

GOLDEN PLAINS SHIRE COUNCIL

# ECONOMIC DEVELOPMENT AND TOURISM STRATEGY 2017 – 2021

PART A – STRATEGY AND ACTION PLAN

PART B – RESEARCH AND FINDINGS



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### EXECUTIVE SUMMARY

Golden Plains Shire Council seeks to adopt a strategic plan that outlines the delivery of economic development and tourism activities to support the direction outlined by the Council Plan 2017-2021.

This document was developed to provide direction and also a consistent and coordinated approach to facilitate Council's tourism and economic development initiatives, activities and events as well as to direct its allocation of resources and build on Council's 2013-17 Economic Development Strategy.

In developing this Strategy, Council undertook to assess the current and future needs of business and industry within Golden Plains Shire. This involved conducting an online survey of business owners, interviews with key stakeholders and focus group sessions with key staff from Council's planning, economic development, environment and tourism teams. A range of Council and external publications including Council Plans, reports and surveys, regional investment plans and strategies, tourism studies and plans were also reviewed as part of this process.

The research highlighted a number of key findings which saw that stakeholders believe Golden Plains Shire's proximity to regional centres and markets was a significant strength along with the region's land affordability which appeals to both new residents and investors. Feedback acknowledged that the Shire has a very strong agricultural industry but also benefits from a diverse range of quality, boutique enterprises making their home in Golden Plains. Of the key challenges facing the municipality, service and infrastructure provision was high on the list with all stakeholders; lack of reliable telecommunications, power supply as well as access to water, sewerage, public transport, roads and education were all noted. The other key challenge highlighted was the need for more support of local business; both through the promotion of businesses to encourage visitation and sales of products and services, and also for the business owners through training and support services.

As a result of a comprehensive review and analysis of all findings, five key pillars were identified as significant in the delivery of the economic development and tourism functions of Council. Each pillar represents a strategic goal, a series of priorities and the methods Council will use to determine success in this area.

The key pillars identified were:

1. Investment attraction
2. Business support
3. Tourism development
4. Lobbying and advocacy
5. Partnerships

This Strategy outlines how key actions under each of these Pillars will guide Council in supporting business and industry across the Shire, as well as attracting new investment into the region to create jobs and strengthen the region's economy over the next four years.

## BACKGROUND

### COUNCIL'S VISION AND MISSION

#### VISION

A healthy, safe, vibrant, prosperous and sustainable community supported by strong leadership, transparent governance and community partnerships - Our Community, Our Economy, and Our Pride.

#### MISSION

We will achieve our vision through:

- demonstrating good governance and involving the community in decision making
- working and advocating in partnership with our community to address social, economic and environmental challenges
- promoting gender equality and equity and inclusion for all
- sustaining a focus on long term outcomes and delivering increased public value through good decision-making and wise spending
- building awareness and strategic alliances with government, regional groups and community.

The Council Plan 2017-21 provides economic development strategic direction through its 'Enhancing Local Economies'.

*"Council will work with business, government and community partners to sustain a diverse, resilient and socially responsible economy, through investment attraction, supporting local business and tourism development." (Council Plan 2017-2021).*

### THE ROLES OF THE ECONOMIC DEVELOPMENT AND TOURISM STRATEGY

The aim of this Strategy is to provide a collaborative and responsible approach and action plan to meet the economic development and tourism needs of Golden Plains Shire, its residents and businesses.

The Council Plan 2017-2021 requires that the economic development and tourism activities address the needs of the community through the key principles of partnership, service and innovation. This Strategy is designed to support the realisation of Golden Plains Shire Council's vision by being collaborative, deliberative and strategic.

A resilient and socially responsible economy requires particular attention to the triple bottom line philosophy, integrating social, environmental as well as the financial impacts when delivering economic development initiatives. Undertakings will require the investigation into financial viability, place-making viability (questioning: does it meet quality of life and connectivity needs, are the initiatives sufficiently well-supported for the long term, is the community involved in a meaningful way, are jobs, product and services sourced locally wherever possible?) and environmental considerations (does it retain the amenity of the area, does it strive to reduce its footprint, what level of impact analysis is required?).

The objectives of this Strategy are to guide Council's activity in supporting business and industry across the Shire, in supporting and promoting local tourism and in attracting new investment into the region, to create jobs and strengthen the region's economy, over the next four years.

## METHODOLOGY

The development of this strategy has involved research, engagement, consultation and analysis to identify economic development and tourism priorities and provide strategic direction for the Shire for the next four years.

### RESEARCH & CONSULTATION

The objective of the research and consultation phase was to collect all data relevant to the project. In particular it was important that stakeholders were provided the opportunity to inform the content of the new Strategy. Feedback and ideas were sought to gauge the state of the region's economy, businesses and industry. There were interviews with key stakeholders and focus group sessions with key staff from Council's planning, economic development, environment and tourism teams. Responses to the 2016 and 2017 Golden Plains Business Survey along with feedback from community via Council's Budget sessions held in late 2016 and the Council Plan consultations held between November 2016 and February 2017 have all been considered. Data has also been drawn from the Community Satisfaction Survey of 2016 and 2017.

Secondary research included a literature review of relevant Council plans, policies, previously conducted research, strategies and documents. Detailed findings from all research and consultation can be found in Part B – Research and Findings.

## GOLDEN PLAINS ECONOMIC PROFILE

Golden Plains is a fast growing municipality located between the regional cities of Geelong and Ballarat. The Geelong Ring Road and Western Highway have dramatically reduced travel times to Melbourne and rail connections enable reliable connectivity to Melbourne.

The Golden Plains economy is dominated by agriculture, with over 10 times the Victorian average number of jobs in this sector. Locally, agriculture accounts for around 25% of output and 20% of employment within the Shire. Small business, dominated by construction is the second largest employer reflecting the strategic location of Smythesdale and Bannockburn, servicing the fast growing western corridor of Melbourne, Geelong and Ballarat.

The Golden Plains economy is closely linked to the regional economies of Geelong and Ballarat which function as product transfer markets; commercial centres and the source of hundreds of jobs most significantly in traditional manufacturing.

The high population growth experienced in the southern and northern ends of the Shire is driven by the strength of these regional centres plus the availability of affordable house and land packages particularly in Bannockburn. Around two thirds of Golden Plains Shire's workforce commute to Geelong or Ballarat for work.

In recent times, the Ballarat and Geelong municipalities have accounted for over 35% of the population growth outside of Metropolitan Melbourne. Approx. 80% of all employment in the municipality remains within the region (i.e. Ballarat and/or Greater Geelong) meaning the area has a high degree of employment self-sufficiency. Recent strong growth in employment (30% higher than Victoria) has driven regional population growth.

Both Geelong and Ballarat are in a period of transition, seeking diversification and moving from traditional manufacturing to more advanced, value adding manufacturing and focusing on growth

industries of the future such as; educational services, health and wellbeing, bioscience, technology and communications, agribusiness, and tourism.

The economic strength of Golden Plains is reflected by the fact that its Gross Regional Product grew at the same rate (30%) as all of Victoria including Melbourne. Given that the key economic sectors, agriculture (grain/intensive/viticulture/sheep) and construction (dwellings) are growing strongly, it is anticipated that Golden Plains will continue its growth trajectory.

Key economic statistics for Golden Plains Shire include:

## POPULATION

1. Population growth in Ballarat and Geelong is at historically high levels (2.5% per annum).
2. The population of Golden Plains Shire is projected to increase by 50% during the next two decades – increasing from around 21,680 people in 2016 to reach 26,700 by 2026 and 32,375 by 2036
3. The long term average rate of population growth across the Shire will be around 2.0%-3.0% faster than Surf Coast (2%) and Moorabool (2.1%).
4. The forecast rate of population growth in Bannockburn (3.5% per annum) and the municipality's South East (2.5%) is broadly comparable with forecast growth in Fyansford. (2.6%), Lovely Banks (3.8%), Torquay North (3.7%), Torquay (3.1%), Bacchus Marsh (2.8%), Ballan (2.7%) and areas of Ballarat West.

## AGRICULTURE

1. Agriculture production is growing strongly. Golden Plains produces 21% of Victoria's eggs, 11% of poultry, 4% of its sheep and lambs and 5% of Victoria's pork.

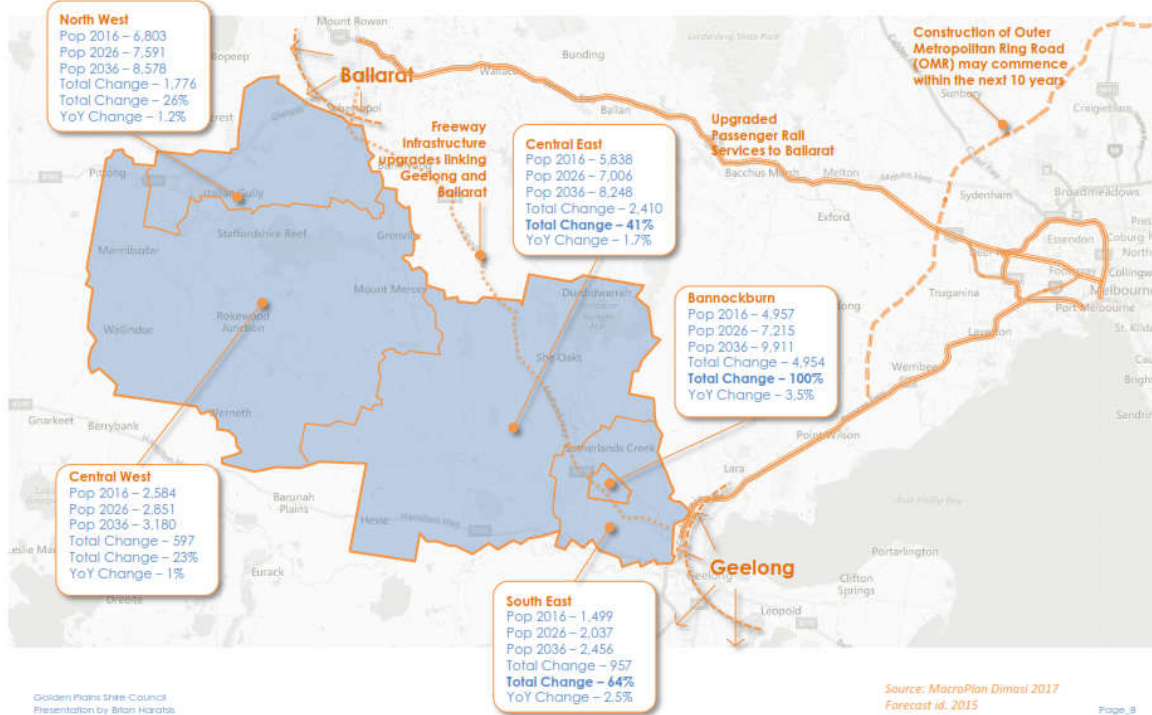
## DWELLINGS AND RESIDENTIAL DEVELOPMENT

1. The number of dwellings in Golden Plains Shire is forecast to increase by 50% to reach 12,696 dwellings in 2026 – an increase of 4,237 dwellings.
2. Golden Plains' new dwelling numbers are broadly equivalent to the volume of new dwellings anticipated in places such as Lara, Mount Duneed, Bacchus Marsh and many of the new urban release areas around Ballarat.
3. Bannockburn is expected to add an extra 2,391 dwellings by 2036 while the North West region abutting Ballarat is expected to add an extra 1,020 dwellings by 2036
4. Residential development in Geelong (Victoria's second largest city) is expected to be concentrated in the neighbouring areas of Batesford, Fyansford, Highton and Armstrong Creek, whilst residential settlements in Ballarat (Victoria's third largest city) will take place in Smythes Creek, Delacombe, Alfredton and Cardigan-Lucas-Bunkers Hill.

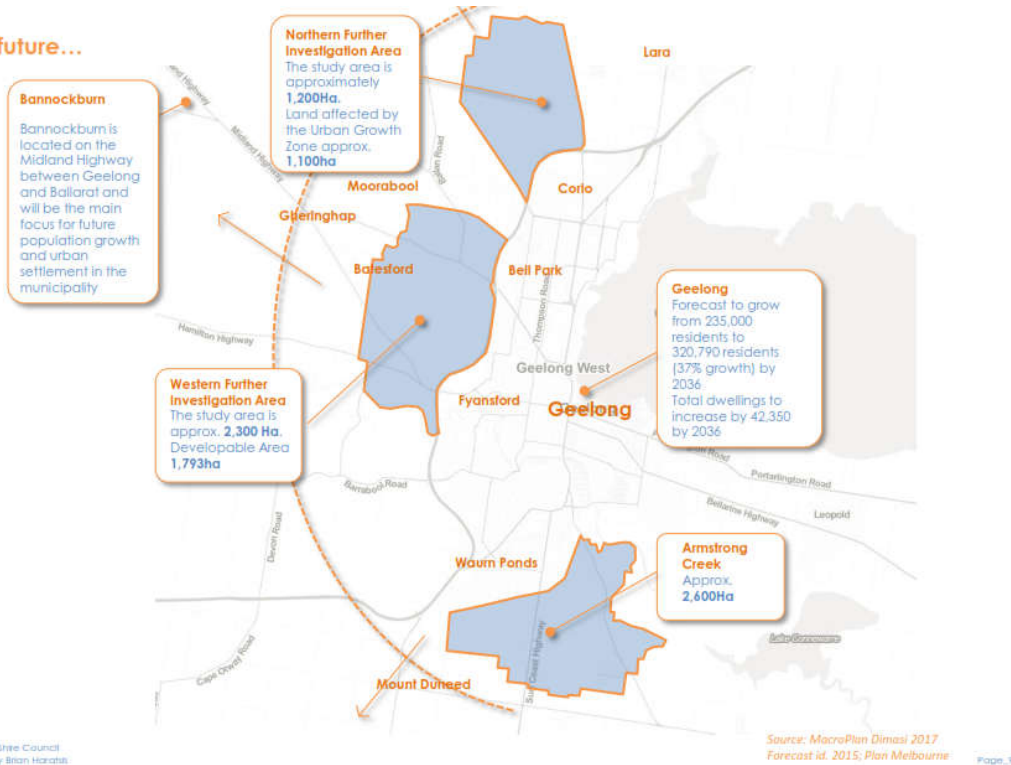
## INFRASTRUCTURE REQUIREMENTS

1. Major infrastructure projects such as the Outer Metropolitan Ring Road (OMR), improved regional road networks and the proposed improvements to Geelong/Werribee/Wyndham rail lines, with improved rail services on the Ballarat Line, are all expected to facilitate greater connectivity to Geelong and Ballarat, and support ongoing fast economic growth.
2. These and other proposed investments are likely to bring more people and investment into Geelong and Ballarat regions and stimulate increased requirements for infrastructure and a range of services within these regional areas, especially within growing population centres and urban fringe locations across the Golden Plains municipality.

**In the future...**



**In the future...**



Economic profile data composited by National economic analysts MacroPlan Pty Ltd.



## GOLDEN PLAINS ECONOMIC DRIVERS

### AGRICULTURE

The main driver of economic activity in Golden Plains Shire is the agricultural sector; employing 26% of the Shire's workforce and worth \$159 million in economic output or 20% of the Shire's economy (REMPAN 2016).

#### BROAD ACRE

In broad acre farming in the region, there has been a shift from livestock toward grain production driven by seasonal changes (climate change) and commodity prices. The trend of lower rainfall in addition to high demand for grain forecast that this trend will continue.

56,000 hectares, or 30%, of land in Golden Plains Shire is used primarily for cropping, with 242 of the Shire's agricultural enterprises (approximately 50%), involved in predominantly the production of barley, wheat and canola.

Despite this more recent shift to cropping, Golden Plains remains a regionally important supplier of cattle, beef cattle, lambs and wool.

#### INTENSIVE

Intensive agriculture includes piggeries, chicken broiler farms, egg farms, free range egg farms and free range poultry. Each week Golden Plains Shire produces four million eggs, 600,000 meat chickens, 1,000 pigs and 28,000 litres of goat's milk which equates to 21% of Victoria's eggs, 11% of poultry, 5% of pigs as well as 4% of Victoria's sheep and lambs (ABS 2010-11).

The 2013 -2017 Economic Development Strategy identified barriers to intensive agricultural development and to some extent they continue to be issues for the agricultural industry in Golden Plains Shire.

Issue in 2013-17 Strategy	Action and results
Lack of water	18km of new potable water pipeline for the Golden Plains Food Production Precinct completed in June 2016. Funded by: Golden Plains Shire, Barwon Water, Federal Government and State Government.  Limited water infrastructure in other areas is still an issue.
Constraints in power capacity and supply	Council works with electricity infrastructure provider Powercor and business owners to resolve emergent issues with good success.  Powercor also encourages the installation of solar panels in shed construction to help meet the power needs of local industry, as provision of 3 phase power is difficult to provide regionally with the current level of infrastructure.
No local feed mill	Lobbying efforts failed to secure a feed mill in Gheringhap when a site in Lara, with fewer biosecurity issues was chosen. In terms of supplying the Golden Plains Food Production Precinct, the Gheringhap Employment Precinct location is still very convenient but requires infrastructure/services support.
Limited land availability due to buffer zones	Council actively seeks to solve this issue through cooperative efforts between land holders, investors and regulative authorities as required.

## POPULATION GROWTH & LIVEABILITY

### POPULATION

A major contributor to economic growth in the Golden Plains Shire region is population growth.

The ready availability of affordable residential land close to both the Geelong and Ballarat regional centres has led to significant growth in both the northern and southern areas of the Shire. While the ten year State average growth rate per annum is 1.7% the Shire's average growth rate has been 2.2% over the same period. The Smythesdale/Ross Creek area has seen 12% per annum growth over recent years and Bannockburn, the Shire's main service centre, has seen average annual growth of 7.2%.

Like most of Australia's population, Golden Plains Shire has a generally ageing demographic profile however with the influx of young adults and families a new wave of children has emerged. This demographic change is driving the desire and demand for child care, maternal child health services, kindergartens, primary schools, playgrounds and other sporting and recreational facilities.

The ageing population is driving demand for aged care, health and well-being services, as well as for infrastructure to support elderly access (eg soft curves for motorised mobility vehicles such as 'gophers'). While the expenditure of aged communities tends to be limited by fixed incomes, that demographic still require housing, transport, services, food and entertainment.

### LIVEABILITY

Liveability is important to sustain population growth. When combined with rural amenity and small town community lifestyle, Golden Plains Shire's liveability has emerged a significant advantage in promoting population growth and investment attraction.

Infrastructure and services are important to liveability. For townships such as Smythesdale, facilities, like The Well: Business Health and Community Hub and the provision of a sewerage system in the township have been very important in population attraction. Across the Shire, Council completed four new kindergarten projects in 2016 to enhance facilities for young families in Bannockburn, Teesdale, Rokewood and Meredith. In the South of the Shire, the Bannockburn Civic Heart Precinct will provide a central hub for community gatherings, family activities, civic ceremonies and an expanded, improved farmers' market and event space.

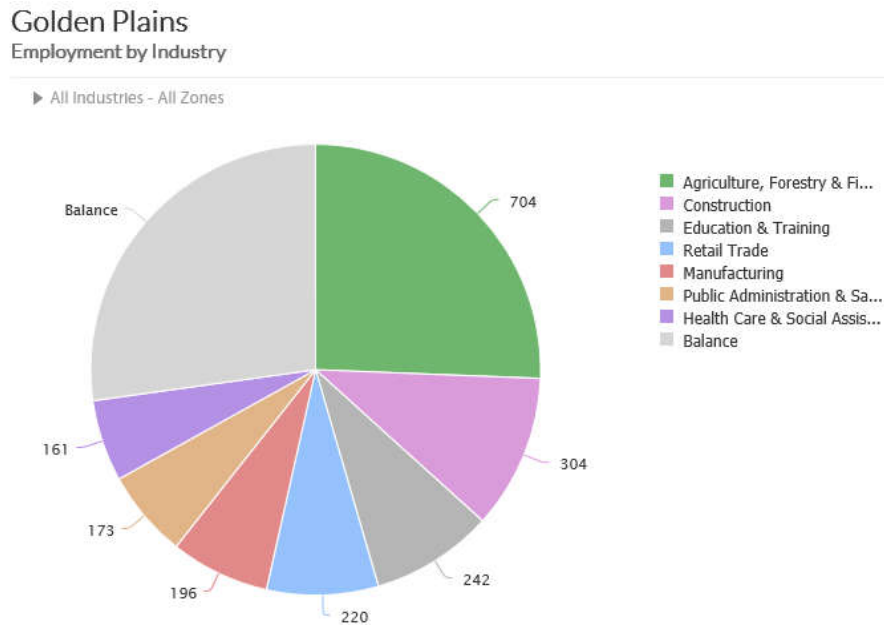
While liveability leads population growth, this growth in turn encourages investment in housing subdivisions, commercial activities and service delivery expansion. In Bannockburn for example, a major redevelopment of the shopping centre is in planning and is anticipated to provide a greater shopping experience plus opportunity for professional services maintaining local expenditure within the Shire. It will also provide a number of jobs for local residents.

The provision of natural gas; high speed broadband and the development of the Bannockburn P-12 College will also have substantial impacts on the appeal of the township. Projections forecast Bannockburn's population will double by 2036 (id.population forecast) so this investment in infrastructure and services now plays an important role in enhancing the local economy over the long term.

## EMPLOYMENT & BUSINESS SUPPORT

### EMPLOYMENT

Golden Plains Shire has relatively low rates of unemployment 3.6% compared to the State (5.7%) and G21 region (5.8%). This is largely due to proximity of our regional centres and the ability of traditional manufacturing and food processing to support high workforce numbers. As the regional economy transitions, one of the key roles for Council in economic development is to maintain or increase local and regional job opportunities for Shire residents.



Two of Council's chief business strategies are investment attraction aimed at drawing new business and supporting exiting business growth, and general business support in the form of training and development and networking opportunities, problem solving and advocacy.

The key focus of Council's investment attraction is to create more Shire located jobs however it is also committed to working with regional partners to ensure that the regional labour market can sustain the Shire's growing population.

Local workforce development is important to economic development, locally and in a regional context, to help residents successfully compete for local and regional employment opportunities as well as to develop a wide range of skills and education levels to aid local business growth, attract new business and create (better and more) jobs.

A strategy of Council is to partner with education and training providers; the new Bannockburn College, Deakin and Federation universities, TAFEs, G21, Small Business Victoria and specialist training providers, to increase awareness and offer pathways and access to job training opportunities. It is of note that the development of the new Bannockburn P-12 College may become a catalyst for business investment (and jobs growth) in the region, providing an access point to a young trainable workforce, as well as a projected increase in local sales and local expenditure with the stabilisation of the local population as Bannockburn become less of a dormitory town and more of a service centre.

Nationally employment is projected to increase in 16 of the 19 broad industries over the five years to November 2020, with declines in employment projected for Agriculture, Forestry and Fishing, Mining

and Manufacturing. Locally, the Barwon and Ballarat regions are against trend with small increases forecast for Agriculture. (Source; Industry Employment Projections 2016 Report. March 2016).

Council's aim is to provide insight and data on how well the skills and education of local workforce align with existing, growing and emergent local industries both within the Shire as well as at our neighbouring city centres.

### INVESTMENT TASKFORCE

Council has an Investment Taskforce that provides guidance, support and advice to business investors of large developments as they go through the planning and development process in Golden Plains Shire. The Taskforce is led by Council's CEO, and includes senior managers from planning and economic development.

Council encourages potential investors to meet with the Investment Taskforce early on in the planning stage, so that Council can assist them through the process. The Taskforce also provides assistance to investors by way of facilitating meetings with Federal, State and Local Government representatives and utility providers responsible for power, water, natural gas and telecommunications.

One of the key actions in this strategy is the development of an investment attraction plan to support the work of the taskforce. It will focus on the southern portion of the Shire, recognised as the area with the greatest potential for increased business activity.

### BUSINESS SUPPORT

Since a high proportion of Golden Plains residents are employed outside of the Shire, support for local business includes support for regional jobs. In this regional context Council's economic development officers participate in G21 Regional Alliance Economic Development Pillar, Agribusiness Network and Tourism Greater Geelong and Bellarine. Officers are also active in facilitating joint investment groups with G21 and Central Highlands partners to support regional cooperation in attracting new business.

In May 2017 Council amended its Procurement Policy to broaden the definition of local procurement to encompass 'G21 and Ballarat regions.' This is aligned with Council's membership of the G21 GROW program to promote local (regional) procurement to support job growth and social procurement. Local procurement and social procurement are closely related. Local procurement is about buying locally to support local businesses and suppliers. One dollar spent locally is multiplied up to three or four times as it circulates around the local economy creating economic prosperity, jobs and other benefits. Social procurement is a way to take local procurement one step further, so that as well as supporting local businesses, we can target members of our community who might otherwise miss out on employment opportunities.

### GOLDEN PLAINS FARMERS' MARKET – BUSINESS INCUBATOR & TOURISM GATEWAY

The Golden Plains Farmers' Market supports regional economic development by creating a direct distribution pathway to consumers for local and surrounding producers and as such acts as a business incubator for new and developing enterprise. It is a central hub for retail, social and community activity and generates a sense of community pride.

The market brings visitors to the area and supports the promotion of Golden Plains as a gourmet food and wine region and therefore encourages future tourism initiatives and business investment. It generates a sense of place and is a critical element in the delivery of Council's largest community project (projected to cost \$4.17M) the Bannockburn Civic Heart Precinct.

## STRATEGIC DIRECTION

As evidenced by the Economic Profile and analysis of the Economic Drivers, the Golden Plains region continues to be in a period of sustained growth and is generating new opportunities for employment, business growth, tourism and investment. Concurrently, economic vulnerabilities create new and ongoing challenges for the local economy.

In order to ensure that economic development and tourism activities address the current economic conditions and add value for Council's stakeholders, the following principles have been considered when developing the Strategy's strategic direction and determining the subsequent actions.

1. Focus resources where a competitive advantage (cost, difference or focus) exists to maximise return
2. Develop a positive business culture (visits, workshops, skills training)
3. Apply consistent effort on key priorities to encourage and identify investment
4. Actively support and promote a proactive planning environment which supports business development, with due consideration to triple bottom line (eg renewable energy)
5. Continue strong focus on lobbying for new infrastructure (Bannockburn Heart, Precincts) and infrastructure renewal.

As a result of the comprehensive review and analysis of all findings, five key pillars have been identified as significant to the delivery of the economic development and tourism functions of Council. Each pillar represents a strategic goal, a series of strategic activities and the methods Council will determine success in this area.

The key pillars identified are:

1. Investment attraction
2. Business support
3. Tourism development
4. Lobbying and advocacy
5. Partnerships

The key focus areas, or Pillars, can be represented as per the diagram featured on this page, where the Pillars 1, 2, 3 and 4 sit within Pillar 5, Partnership.



# INVESTMENT ATTRACTION PILLAR



Seek to establish Golden Plains as a location of choice to attract new business investment and facilitate business growth.

Strategy	Measurables
<p><b>Seek to establish Golden Plains as a location of choice to attract new business investment and facilitate business growth through:</b></p> <ul style="list-style-type: none"> <li>○ Understanding the local economy, identifying opportunities, and gaps</li> <li>○ Marketing our strengths and opportunities for investment in areas such as the Golden Plains Food Production Precinct and Gheringhap Employment Precinct</li> <li>○ Developing strong internal and external relationships</li> <li>○ Provide information, data and guidance to investors</li> <li>○ Identifying potential sites for development</li> <li>○ Facilitating the Investment Task Force to provide high level support to new large scale investors</li> </ul>	<p>Develop the Golden Plains South Investment Strategy</p> <p>Implement the Golden Plains South Investment Strategy</p> <p>Number of business and investment enquiries</p> <p>Number of businesses in the Shire</p> <p>Number of jobs in the Shire</p> <p>Gross Regional Product</p>

# BUSINESS SUPPORT PILLAR



Support and encourage pathways for education, training and lifelong learning for our community.

Support and nurture local business development and economic growth to generate local employment opportunities.

Strategy	Measurables
<p><b>Support and nurture local business development and economic growth to generate local employment opportunities, and</b></p> <p><b>Support and encourage pathways for education, training and lifelong learning for our community through:</b></p> <ul style="list-style-type: none"> <li>• Business visits and relationship building</li> <li>• Problem solving</li> <li>• Facilitating linkages &amp; referrals</li> <li>• Responding to business enquiries</li> <li>• Facilitating business networking events</li> <li>• Facilitating &amp; auspicing links to grant programs</li> <li>• Business training and mentoring</li> <li>• Provision of Economic Development news and information</li> <li>• Buy local campaign</li> <li>• Continued support of the Golden Plains Farmers' Market</li> </ul>	<p>Number of new businesses registered</p> <p>Number of businesses attending business events, training, mentoring etc</p> <p>Number of Golden Plains Farmers' Market's held each year</p> <p>Number of businesses engaged</p> <p>Labour market participation</p>

# TOURISM DEVELOPMENT PILLAR



Work with regional and broader businesses and industry to develop our visitor economy as a key contributor to local economic sustainability.

Strategy	Measurables
<p><b>Work with regional and broader businesses and industry to develop our visitor economy as a key contributor to local economic sustainability through:</b></p> <ul style="list-style-type: none"> <li>Continued support of the Golden Plains Farmers' Market</li> <li>Supporting community and business events</li> <li>Facilitating Federal and State Government grants</li> <li>Implementing and supporting township Welcome Hubs</li> <li>Supporting and promoting the Moorabool Valley Taste Trail</li> <li>Supporting the Golden Plains Arts Trail</li> <li>Promoting Golden Plains heritage</li> <li>Supporting Lethbridge Airport</li> <li>Support the development of tourism projects and infrastructure</li> <li><b>Investigate improvements to tourism infrastructure</b></li> </ul>	<p>Completion of stage one of the Bannockburn Heart Development</p> <p>Number of Golden Plains Farmers' Market's held each year</p> <p>Tourism output and jobs in Golden Plains Shire</p> <p>Number of tourism projects</p>



# LOBBYING AND ADVOCACY PILLAR



Engage Federal and State Government in supporting local business and local infrastructure.

Strategy	Measurables
<p><b>Engage Federal and State Government in supporting local business and local infrastructure through:</b></p> <ul style="list-style-type: none"> <li>• Identifying and communicating key priorities, issues, concerns and projects</li> <li>• Organising a calendar of meetings with relevant Ministers and members of parliament</li> <li>• Developing and regularly updating the Priority Projects booklet and issue specific Briefing Notes</li> <li>• Writing submissions highlighting key issues for business and the community</li> <li>• Participating in G21 Regional Alliance delegations to State and Federal Ministers</li> <li>• Organising guest presenters to Council</li> <li>• Running corporate event announcements, openings and other official events</li> <li>• Developing event-specific Briefing Notes</li> <li>• Liaising with Government agencies</li> <li>• Lobbying and working with utility and telecommunication providers to expand infrastructure and services</li> </ul>	<p>Successful outcomes achieved as a result of lobbying and advocacy work eg funding secured, new infrastructure, community problems addressed</p> <p>Number of lobbying and advocacy meetings held</p> <p>Number of delegations participated in</p> <p>Number of submissions to enquiries</p>

# PARTNERSHIPS PILLAR



Facilitate, advocate and work with business, government, community, key stakeholders and groups to enhance our local economy.

Strategy	Measurables
<p><b>Facilitate, advocate and work with business, government, community, key stakeholders and groups to enhance our local economy through:</b></p> <ul style="list-style-type: none"> <li>• Active networking</li> <li>• Integrated cross departmental planning</li> <li>• Membership of regional influence groups</li> <li>• Collaborative project development</li> </ul>	<p>Number of partnerships and partnership projects</p> <p>Outcomes of partnerships</p>

## RESOURCED ACTION PLAN

Note, the Year One action items included in the plan below are all resourced within the draft 2017/18 Budget. Programs and activities outlined for the future comprising Year Two, Three and Four constitute core business and are expected to be provided for within the annual operating budget for Economic Development and Tourism activities. Actions that would require additional funding or would be contingent on other contributions have not been included.

Investment Attraction				
Action	Year 1	Year 2	Year 3	Year 4
Develop Golden Plains Southern Investment Attraction Strategy	✓			
Implement the Golden Plains Southern Investment Attraction Strategy		✓	✓	✓
Develop Bannockburn Industrial/Commercial investment prospectus		✓		
Develop Gheringhap Employment Precinct investment prospectus		✓		
Promote & support the Golden Plains Food Production Precinct	✓	✓	✓	✓
Review Golden Plains Investment Taskforce		✓		
Facilitate Regional Investment Collaboration	✓	✓	✓	✓
Engage in local workforce development activities			✓	✓
Fulfil Council Plan commitment to social and environmental responsibility in investment attraction	✓	✓	✓	✓

Business Support				
Action	Year 1	Year 2	Year 3	Year 4
Develop and implement a local business networking plan incorporating business visits and tours and business networking events across a broad range of industries	✓	✓	✓	✓
Deliver business networking events	✓	✓	✓	✓
Facilitate the delivery of business training and mentoring services	✓	✓	✓	✓
Facilitate economic development and planning cooperation on development projects	✓	✓	✓	✓
Disseminate business information via newsletters, email updates, social media and websites	✓	✓	✓	✓
Encourage local businesses to buy local by developing an online business directory		✓	✓	
Conduct a bi-annual online business survey		✓		✓

## Tourism Development

Action	Year 1	Year 2	Year 3	Year 4
Support the Moorabool Valley Taste Trail	✓	✓	✓	✓
Develop a Goldfields Heritage Trail			✓	
Develop a new tourism website	✓			
Develop a tourism promotional campaign including social media		✓	✓	✓
Support and further develop township Information Hubs and tourism signage	✓	✓	✓	✓
Support and develop creative industries, local events and festivals	✓	✓	✓	✓
Develop and grow the Golden Plains Farmers' Market	✓	✓	✓	✓
Facilitate regional cooperation with Tourism Ballarat and Tourism Greater Geelong & Bellarine	✓	✓	✓	✓
Investigate improvements to tourism infrastructure, eg caravan and camping infrastructure, signage, lookout points, trail networks.		✓	✓	

## Lobbying & Advocacy

Action	Year 1	Year 2	Year 3	Year 4
Review Lobbying & Advocacy Plan with Comms & Marketing unit	✓	✓	✓	✓
Identify, communicate community & Shire wide issues and projects	✓	✓	✓	✓
Provide support to lobbying & advocacy meetings with Members of Parliament and Government agencies	✓	✓	✓	✓
Promote the Shire through corporate events – announcements, openings, sod turning events and business networking events	✓	✓	✓	✓
Liaise with and support utility providers to improve local services such as water, gas, power & telecommunications	✓	✓	✓	✓

## Partnerships

Action	Year 1	Year 2	Year 3	Year 4
Develop and implement a plan to actively network with business, government, community & key stakeholders	✓	✓	✓	✓

Develop and implement a process for cross departmental cooperation on economic development & tourism	✓			
Participate in regional partnership opportunities with the Central Highlands and G21 regions	✓	✓	✓	✓
Investigate membership of regional bodies such as the Central Highlands and G21, Committees for Ballarat & Geelong,	✓	✓	✓	✓
Participation in the implementation of the G21 Sustainable Agribusiness Strategy 2017-2022.	✓	✓	✓	✓

***Thank you for reading our Economic and Development and Tourism Strategy.***

PART B – RESEARCH & FINDINGS

**Timing:** June 2016 – June 2017

**Evaluation:** All information received was recorded and reviewed and used to inform the development of the Draft Economic Development and Tourism Strategy and is, where appropriate, included in the Strategy.

**Research:** A literature review of Council’s documents and those of other organisations, where relevant, was undertaken to place this strategy in a position to claim “best practice” with its economic development and tourism responsiveness and activities.

DOCUMENTS & COMMUNITY FEEDBACK REVIEWED

Document	Themes and findings relevant to Strategy
Council Plan 2017-2021	Provided Council vision, mission and values which underpin the strategic direction of this strategy.
Golden Plains Shire websites	Provided background information on council, the region and Council’s existing economic development and tourism methods and information. This includes Council’s Taste See Explore tourism website and Golden Plains Farmers’ Market website.
Golden Plains Shire Council Economic Development Strategy 2013 to 2017	This document provided background information on the evolution of the economic development and tourism function with Golden Plains Shire Council. In summary it reported on the researched findings of the time and called for a focus on three key areas, namely; connecting the economy, facilitating business and investment and enhancing liveability.
Golden Plains Food Production Precinct Concept Plan & Business Case	These documents detail the Shire’s commitment to intensive agriculture development in the region, and identify the key inhibitors to its development, as well as helping to guide future development in the sector.
Golden Plains Shire Council’s Business Survey (2016 and 2017)	These surveys provided detailed feedback from local business owners and operators about economic development activities within Golden Plains Shire. See summaries at appendices one and two.
Golden Plains Shire Council’s quarterly economic development e-newsletter - EDQ	Provided information on the Council, region and existing economic development initiatives.
Investment Taskforce Group Terms of Reference	Guiding principles for high level and cross departmental support for new investment.

Id Community Profile	Provided a demographic analysis of the Shire based on previous Censuses as well as updates provided by the Australian Bureau of Statistics.
Id Economic Profile	Provided a detailed breakdown of the Shire's economic data based on information from the Australian Bureau of Statistics and NIEIR.
Id Forecast	Provided demographic information about the future of the region.
REMPPLAN Economic Data Modelling	A Shire and region based analytical resource tool featuring detailed economic data.
Golden Plains Shire Rating Strategy February 2017	Prepared by MacroPlan, this report examined local and regional economic and demographic indicators to establish the differential rating methods for Golden Plains Shire.
IBIS World Reports	IBIS reports provide the latest industry statistics and industry trends, allowing Council to identify the products and customers driving revenue growth and profitability in specific industries. The reports identify leading companies and offers strategic industry analysis of the key factors influencing the market.
Council Plan survey, Community Feedback for 2017/18 Budget and Community Feedback Council Plan engagement	A range of community consultation during October 2016 to February 2017 provided feedback that has been grouped into three themes. See appendix three.
G21 Economic Development Strategy (2014)	This document outlined the strategic and action-based economic development activities the G21 Economic Development Pillar aimed to undertake; key initiatives to support included Lethbridge Airport and the Golden Plains Food Production Precinct. Advocacy issues included freight, passenger and major road connections. Outcomes sought included increased tourism visitation, job accessibility and improved travel efficiency.
Strategic partners review	This body of work identified the key partners of Golden Plain Shire Council and the value of collaboration with these partners. See Appendix four.
Tourism Greater Geelong and Bellarine Strategic Plan 2014 - 2017	The regional strategy to drive, support and grow the visitor economy.
Tourism Greater Geelong and Bellarine Tourism Development Plan 2016	Identifying key development opportunities for the region including Golden Plains Shire.
Tourism Victoria's Regional Tourism Strategy 2013-2016	Document outlines the action-based activities of Tourism Victoria to encourage tourism to regional Victoria.
Deloitte Access Economics The Current and Futures State of Victoria	A macro perspective of the future state of Victoria's society, economy and environment.

Deloitte Access Economics Building the Lucky Country	A series of reports on imperatives for a future prosperous Australia.
Committee for Economic Development Australia (CEDA) Economic and Political Overview	Analysis of the current state of the economic and political environment that supports future growth.
Rural Councils Victoria 2012 report – ‘Economic Development Activities and Capacity Audit.’	This Strategy’s focus on five key areas is also supported:  <i>“Retention and expansion of existing business and industry continues to be the major area of focus ... with 27% of Councils nominating this activity within the two most important economic development priorities ...</i>  <i>Tourism promotion and product development was nominated as the second major focus with (22%) ...</i>  <i>Attraction of new business and industry was nominated as the third major focus ...by 18% of Councils.”</i>
SWOT Analysis	See appendix five.

**Appendices follow overleaf.**



## APPENDIX ONE: 2016 GOLDEN PLAINS BUSINESS SURVEY OVERVIEW

- 75 businesses responded, the majority of which (70%) were small businesses, employing 0-4 employees.
- Responses came from across the Shire, with the majority from Bannockburn, 'Other', Dereel, Inverleigh, Lethbridge and Meredith.
- The majority of responses were from businesses in the agriculture, forestry and fishing sector (20), followed by 'Other', construction and professional, scientific and technical services.
- The majority of businesses (76%) advised that their staffing levels had stayed the same over the past 12 months, with 16% increasing, and 5% decreasing their staffing levels.
- 50% of responders advised that their mobile phone coverage was either good or very good, and 44% advised that it was either fair or poor.
- 77% had no issues finding suitable staff, with 16% stating that they did have trouble finding suitable staff.
- Only a few respondents provided suggestions for training opportunities that they would like to see offered in the Shire, suggestions included business management and accounting, marketing and social media and heavy vehicle training.
- 15% were exporting, with the majority exporting agricultural products to a broad range of markets.
- Around half of the businesses who responded had experienced growth in the last 12 months.
  
- Key issues:
  - More support needed for local businesses (including more locals buying local and more opportunities to promote local businesses)
  - Lack of infrastructure and services (including telecommunications)
  - Climate and access to water
  - Challenges working with and getting support from Council generally
  - Lack of transport services and isolation
  
- Main opportunities:
  - Eco-tourism
  - Intensive and non-intensive agriculture
  - Growing population
  - Affordable land and housing
  
- Key initiative that businesses want to see implemented include:
  - Improved services and infrastructure (high school, supermarket, retail space, roads, public transport, water and telecommunications)
  - More promotional and networking opportunities for businesses
  - Tourism and eco-tourism
  - Opportunities for international trade

## APPENDIX TWO: 2017 GOLDEN PLAINS BUSINESS SURVEY OVERVIEW

- There were 55 responses to the 2017 Golden Plains Business Survey. The majority of which (74%) were small business (0 - 4 employees) with the primary business location reported as Bannockburn with 14 businesses.
- The industry sector most represented was agriculture followed by construction, retail then professional, scientific and technical services. More than half of survey respondents reported that their staffing levels had remained the same over the past 12 months with 5% reporting a decrease in staff citing not enough work along with restructuring the business. The majority of respondents (66%) reported that they had not had any issue finding suitable staff. 27% of respondents reported having trouble finding suitable staff. The main reason for this was poor quality applicants. There was a broad range of positions that they were unable to fill.
- Training opportunities that respondents would like offered in Golden Plains Shire include business management and accounting, marketing and social media, heavy vehicle licensing and more apprenticeships and traineeships on offer in the region.
- Answers regarding the effectiveness of telecommunications were divided with approximately half of respondents reporting that mobile phone and internet services were good or very good and the other half reporting they were fair or poor.
- Sixteen percent of businesses were exporting, predominantly agricultural products, to a broad range of markets.
- Approximately half of businesses who responded had experienced growth and half had not, and 49% of respondents were home based businesses.
- Key issues:
  - More support needed for local business (including more locals buying local and more opportunities to promote businesses)
  - Lack of infrastructure and services (including telecommunications)
  - Finding and retaining reliable and experienced staff
  - Challenges working with and getting support from Council generally
  - Lack of transport services and isolation
- Main opportunities:
  - Eco- tourism
  - Intensive and non-intensive agriculture
  - Growing population
  - Affordable land and housing
- Key initiatives that businesses want to see implemented include:
  - Improved services and infrastructure (high school, supermarket, retail space, roads, public transport, water, and telecommunications)
  - Further support for outlying towns
  - 'Buy local' campaign initiated by Council for the entire Shire (promote local businesses with links on council's website)
  - Business support (to help access funding and grants, networking opportunities, book keeping basics and mentoring)
  - Youth training and support
  - Agri tourism growth (develop and market our producers to bring more people to the area)

## APPENDIX THREE: COMMUNITY FEEDBACK, BUDGET AND COUNCIL PLAN

Theme	What the community told us they want	Location
<b>Encourage business growth</b>	<ul style="list-style-type: none"> <li>Encourage new business, small business, business education and training</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Financial incentives for business, lower rates, charges, fees for business set up</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Small business or tourism grants</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Reduce red tape, paperwork, streamline permit process</li> </ul>	Whole shire
<b>Support rural economy and tourism</b>	<ul style="list-style-type: none"> <li>Support farming</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Develop and promote tourism opportunities</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Develop small towns as tourist attractions</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Employment growth (e.g. alternate farming etc.)</li> </ul>	Central
	<ul style="list-style-type: none"> <li>Promote niche crops, intensive agriculture, sustainable living</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Better balance between farming and the environment</li> </ul>	South
	<ul style="list-style-type: none"> <li>Tourism focus - environmental, historical, promote rail trail and rainbow bird trail</li> </ul>	North
<b>Buy local and increase local jobs</b>	<ul style="list-style-type: none"> <li>Use local businesses for contracting work</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Develop local trade services directory for Shire</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Jobs for all skill levels</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>Local community working spaces instead of commuting</li> </ul>	Whole shire
	<ul style="list-style-type: none"> <li>University/ industrial / employment for youth</li> </ul>	North
<b>Financial Transparency</b>	<ul style="list-style-type: none"> <li>Be open and transparent, particularly financial disclosure, decision making, tendering, officials' interests, conflicts of interest, funding, grants, wages and programs, future plans</li> </ul>	Whole shire

## APPENDIX FOUR: STRATEGIC PARTNERS

### REGIONAL DEVELOPMENT VICTORIA

Regional Development Victoria (RDV) delivers the Victorian Government's vision of creating a stronger regional Victoria through job creation, better infrastructure and new investment.

RDV has regional offices in Geelong and Ballarat respectively. The Ballarat office is the service centre for Grampians region of which Golden Plains Shire is a member. However due to the close proximity of the Shire's main business and commercial centre, Bannockburn, to Geelong there is also a strategic relationship with this office.

Council works with RDV to develop opportunities to grow the economy and create jobs through supporting local business, investment attraction and community infrastructure. RDV provides specialist advice and access to funding sources to support these key initiatives.

Greater value could be achieved through the relationship with both offices of RDV by continued liaison, and information sharing plus a commitment to early involvement in new opportunities.

### BUSINESS VICTORIA

Business Victoria is a government agency designed to help Victorians start, run and grow their businesses.

Business Victoria provides an on line Q&A service and an interactive guide that can be customised. It also provides information on

- key business issues
- specific industry sectors
- government licenses and regulations that apply to your business
- financial support, advice and training.

Council partners with Business Victoria to provide the Small Business Bus at locations across the Shire. The bus is staffed with professionals who can provide general business assistance and also personalised mentoring for business operators.

Council recognises the value of Business Victoria resources and the Small Business Bus and will continue to engage with them in the future to increase access for all Shire businesses.

### SMALL BUSINESS MENTORING SERVICE

The Small Business Mentoring Service (SBMS) is an incorporated not-for-profit association that has over 130 experienced business mentors who offer mentoring programs for small business.

Golden Plains Shire Council has engaged their services to offer mentoring sessions in towns across the Shire for small business. Council covers the cost of these sessions so that the service can be offered free to small business.

These sessions have been well received by businesses in Golden Plains and Council plans on continuing to engage their services to build the capacity and skills of local businesses.

## BUSINESS GROUPS

There is only one local business association in Golden Plains Shire, the Bannockburn Chamber of Commerce. Council works with this group and also the Geelong Chamber to run business networking events and provide local business training. Council will continue to work with the local Chamber to help grow its capacity as a business network.

A closer relationship with the Geelong Chamber and building of a new relationship with Commerce Ballarat will lead to greater opportunities for Golden Plains Shire businesses.

## G21

Geelong Region Alliance (G21) is the formal alliance of government, business and community organisations working together to improve the lives of people within the Geelong region across five municipalities – Colac Otway, Golden Plains, Greater Geelong, Queenscliffe and Surf Coast.

G21 works as a forum to discuss regional issues across interest groups and municipalities resulting in better co-ordinated research, consultation and planning.

G21 is the official Strategic Planning Committee for the G21 region and, as such, is responsible for leading the development and implementation of the region's strategic plan.

Council participates in all aspects of the G21. Economic Development issues and activities are heard through the Economic Development Pillar. Council participates in partnership projects that benefit Golden Plains Shire and the region such as the G21 Agribusiness Forum Innovation Roadmap Project.

The strategic partnership enables Golden Plains to support G21 regional projects and have G21 lobby on our behalf for the success of project funding bids.

Greater value could be achieved through increased engagement with the Economic Development Pillar to build a stronger network of relationships that would support local economic growth.

## REGIONAL TOURISM ASSOCIATIONS

Golden Plains Shire is a member of Tourism Greater Geelong and Bellarine (TGGB) and is represented on the Board by a Councillor delegated annually by Council.

Council works with TGGB to grow the visitor economy through developing product and marketing experiences that attract visitors. A key joint initiative is the newly formed Moorabool Valley Taste Trail that will market and promote the gourmet food and wine experience to be found in the southern end of the Shire.

Greater value could be achieved through increased engagement with the TGGB staff through networking opportunities and monthly regional tourism staff meetings.

## BALLARAT REGIONAL TOURISM

Council works with Ballarat Regional Tourism (BRT) to promote the attractions and businesses in the North of the Shire. This includes the Ballarat to Skipton Rail Trail and the heritage townships of Linton and Smythesdale. Council is not currently a member of BRT but will be investigating ways to achieve greater value from this relationship.

## INTERNAL PARTNERS

The Economic Development Unit works collaboratively with business units across the Shire especially in areas of mutual interest such as Land Use Planning and Recreation Services. Council collaborates with Planning officers to provide the best possible information and guidance to assist local business development. These two business units also collaborate on the Investment Taskforce to facilitate new investment.

Economic Development Officers work with Recreation staff on project such as the Ballarat to Skipton Rail Trail that attracts visitors to the region but also provides a popular recreation facility for local residents.

Economic Development is also responsible for resourcing the Golden Plains Shire organisation with economic data modelling through REMPLAN and demographic data through i.d. profile. These services enhance service planning for units across the Shire and provide credible data input to grant applications.

Closer working relationships and engagement with key staff to assist economic development planning will foster productive outcomes for the Shire plus add value to support initiatives for local business development and investment attraction.

## UTILITIES

Golden Plains Shire business growth depends on access to water, gas, electricity and telecommunications. Council works with utility providers to identify gaps in service, strategic supply needs, problem solving and opportunities to support business investment.

## CUSTOMERS

### COUNCIL

This Strategy aligns with the Council Plan and delivers Council's vision for the growing prosperity of the Shire.

The Economic Development Unit keeps Council informed and involved through briefings, reports and newsletters. An increased focus on Council engagement will foster a greater understanding of the purpose of professional economic development and the role of Council Officers. It will also provide the opportunity to tap into the knowledge and experience of Councillors across their own varied professional and Council careers.

## LOCAL BUSINESS

A key platform of the Economic Development & Tourism Strategy is to support local business through provision of information and advice, access to training and mentoring services, and facilitation of relationships with other sections of Council.

Council also partners with business groups and government agencies to provide training and development opportunities and business networking events.

A greater emphasis on building local business knowledge and understanding of the resources and assistance available will help maintain and grow the local economy. Small business mentoring through Small Business Victoria will be a focus.

## INVESTMENT ATTRACTION

Council actively promotes opportunities for investment in the Gheringhap Employment Precinct and the Golden Plains Food Production Precinct and responds comprehensively to enquires from private investors and government agencies. Council provides information, facilitation, site selection advice and problem solving to ease the way for investment, new business and job growth.

Council has established the Investment Taskforce, to provide guidance, support and advice to investors as they go through the planning and development process in Golden Plains Shire. The taskforce is headed up by Council's CEO, and includes senior managers from planning and economic development.

Council encourages potential investors to meet with the Investment Taskforce early on in the planning stage, so that Council can assist them through the process.

The Taskforce also provides assistance to investors by way of facilitating meetings with federal, state and local Government representatives and utility providers responsible for power, water, natural gas and telecommunications.

A concerted effort to attract investment will be facilitated by new business prospectuses for the Gheringhap Employment Precinct and the Golden Plains Food Production Precinct.

## VISITORS

The Visitor Economy is an important and underappreciated segment of the Golden Plains economy. Visitors are not just tourists, they are friends and relatives visiting or staying with residents; they are the business, government and other professional people travelling through the Shire.

Services that will assist visitors are provided through:

- Our website [www.visitgoldenplains.com.au](http://www.visitgoldenplains.com.au)
- Welcome Hubs
- Brochures
- Maps
- Interpretive signage

- Information is also shared through Council's social media
- Partnership marketing through Tourism Greater Geelong and the Bellarine and Tourism Ballarat.

The Economic Development Unit works with tourism business operators to develop visitor product and experiences. It provides advice, access to Small Business Victoria services, and facilitation of relationships with other sections of Council.

Key visitor products supported by Golden Plains Shire are the

- Golden Plains Farmers' Market
- Golden Plains Arts Trail and
- Moorabool Valley Taste Trail
- Ballarat to Skipton Rail Trail

Over the next three years the Moorabool Valley Taste Trail, including the Golden Plains Farmers' Market, will lead Council's investment in the Visitor Economy as it has the most potential to grow visitor numbers and increase the visitor yield for local business.

Alongside this approach will be an increased focus on promoting local things to local people tapping into the potential of the visiting friends and relatives market.



## APPENDIX FIVE: SWOT ANALYSIS

Survey results, research and focus group feedback identified strengths and weaknesses of economic development and tourism in the Shire and are summarised in the SWOT analysis below.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Proximity - Geelong, Ballarat, Melbourne</li> <li>• Land affordability</li> <li>• Room for growth – commercial, industrial, residential</li> <li>• Underutilised infrastructure and facilities</li> <li>• Agricultural industry – broad acre farming, cropping, intensive, viticulture</li> <li>• Boutique enterprises – goats cheese, olives, fine wines</li> <li>• Goldfields heritage – historic sites, townships, bridges, trails</li> <li>• Events – commercial and community</li> <li>• Equestrian centres</li> </ul>	<ul style="list-style-type: none"> <li>• Employment and expenditure escape to Geelong, Ballarat, Melbourne</li> <li>• Services lacking or not equitably provided - telecommunications, gas, power, water, waste water treatment for industrial zones, sewerage for townships, public transport</li> <li>• Lack of land zoned for industrial development close to townships</li> <li>• Lack of economic diversity – dominated by agriculture</li> <li>• Goldfields heritage underperforming as a tourism attractor</li> <li>• Lack of local tourism business groups</li> <li>• Lack of accommodation providers</li> <li>• Golden Plains Shire brand recognition</li> </ul>
Opportunities	Threats
<p>Investment attraction:</p> <ul style="list-style-type: none"> <li>• Small to Medium Enterprises (SME) – industrial, agriculture value adding</li> <li>• Intensive agriculture – eggs, chicken meat, pork, goats, horticulture</li> <li>• Moorabool Valley – viticulture, equestrian</li> <li>• Golden Plains Farmers’ Market</li> <li>• Residential development</li> <li>• Commercial/services for growing population</li> </ul> <p>Accommodation – BnBs, Air BnBs</p> <p>Tourism development:</p> <ul style="list-style-type: none"> <li>• Goldfields heritage</li> <li>• Arts and Culture</li> <li>• Trails – cycling, walking, horse riding</li> <li>• Visitor economy –friends and relatives</li> <li>• Encourage more community events</li> <li>• Support new commercial events</li> <li>• Golden Plains brand development</li> </ul>	<ul style="list-style-type: none"> <li>• Competition for investment with Geelong and Ballarat</li> <li>• Lack of water to support investment</li> <li>• Climate change effects on agriculture</li> <li>• Corporate buy-up of agricultural land</li> <li>• New farming techniques, research and development,</li> <li>• Business viability/sustainability</li> <li>• Manufacturing restructure</li> <li>• Rate capping</li> <li>• Funding</li> </ul>

## NOTES

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