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Purpose of the Annual Update

This 2021 Annual Update to the Skills Forecast and Proposed Schedule of Work 2019 – 2022 (Skills Forecast) presents additional industry intelligence from 2021 to build on previously reported information. This Annual Update from the Meat Industry Reference Committee (IRC) includes intelligence based on national and industry data sources and input from key stakeholders. It proposes vocational education and training (VET) training package review and development work that the IRC deems necessary to meet the needs of industry. The Australian Industry and Skills Committee (AISC) considers this information and includes commissioned work in the National Schedule¹.

In 2019, the AISC changed the requirements for the annual Skills Forecast. IRCs are now required to submit comprehensive Skills Forecasts once every three years, with abridged annual updates in the intervening two years. As IRCs submitted comprehensive Skills Forecasts in 2019, the next are due in 2022. This Annual Update should be read in conjunction with the Skills Forecast and previous Annual Updates.

This document is not intended to be representative of every issue encountered across all industry sectors; it identifies and addresses the challenges and opportunities that industry has determined as 'priority' for this stage of the schedule, and is a resource for industry and associated skills, learning and accreditation bodies seeking to act upon them.

Detailed information concerning industry skills needs across all sectors covered by the Meat IRC, including information from previous Skills Forecasts and Annual Updates, can be found on the Skills Impact website: <https://www.skillsimpact.com.au/meat/skills-forecast/>.

Method & Structure

This is an annual update to the comprehensive Skills Forecast submitted in 2019. IRCs are required to answer the questions in **Section A** to provide updates on issues such as industry skills and workforce development, and qualification utilisation. Answers provided build on and are not repetitive of information reported in previous Annual Updates.

IRC's are also permitted to propose additional training package development work projects to be included in the Proposed Schedule of Work. These will now be submitted separately to the Annual Updates.

Section B details the extensive, robust and ongoing industry consultation undertaken by IRC members and Skills Impact, including with rural, regional and remote stakeholders. In line with Skills Impact's values², this helps to ensure transparency and accountability in the process of industry research and Training Package development work.

This Skills Forecast and Proposed Schedule of Work is developed in line with:

- Standards for Training Packages 2012³;
- Training Package Products Policy⁴;
- Training Package Development and Endorsement Process Policy⁵.

¹ Australian Industry and Skills Committee (2021); *Australian Industry and Skills Committee*; <https://www.aisc.net.au/content/national-schedule>; viewed 13/04/2021.

² Skills Impact (2021); *About us*; <https://www.skillsimpact.com.au/about/>; viewed 13/04/2021.

³ Department of Education, Skills and Employment (2017); *Standards for Training Packages 2012*; <https://docs.education.gov.au/documents/standards-training-packages-2012>; viewed 13/04/2021.

⁴ Department of Education, Skills and Employment (2020); *Training Package Products Policy*; <https://docs.employment.gov.au/documents/training-package-products-policy>; viewed 13/04/2021.

⁵ Australian Industry and Skills Committee (2020); *Training Package Development and Endorsement Process Policy*; <https://docs.employment.gov.au/documents/training-package-development-and-endorsement-process-policy-0>; viewed 13/04/2021.

Industry Reference Committee

The Meat IRC is responsible for national training package qualifications relevant to the meat processing industry.

Qualifications overseen by the IRC are in the AMP Australian Meat Processing Training Package.

The Meat IRC is supported by the Skills Service Organisation, Skills Impact.

The Industry Reference Committee (IRC) is made up of people with experience, skills and knowledge in the meat processing industry, covering a breadth of experience from across relevant sectors.

Name	Organisation or Area of Expertise
Michael Bayer (Chair)	Industry Expert - Pork Processing
Stacey McKenna (Deputy Chair)	Peak/Advisory/Association
Graham Smith	Employee Representative
Grant Courtney	Industry Expert - Meat Processing
Matt Journeaux	Industry Expert - Meat Processing
Michael Williams	Industry Expert - Beef Processing
Scott Robinson	Industry Expert - Meat Processing
Rod Sellers	Industry Expert - Meat Retailing
Nick Roach	Industry Expert - Smallgoods Manufacturing
Glenn Southward	Industry Expert - Beef Processing
Amanda Carter	Industry Expert - Meat Processing
Morna Young	Industry Expert - Sheep Processing
Mark Rickard	Industry Expert - Poultry Processing

Executive Summary

While the Australian meat industry was mainly able to respond and adapt to the challenges of the last year, it was substantially affected by COVID-19, with direct impacts on workforce, markets and training. The most serious of these impacts was the break-out of COVID-19 clusters associated with several meatworks. This affected the health of workers and, while most of these outbreaks were not a result of the conditions in the workplace itself, pressure was placed on businesses' continuing operations due to precautionary restrictions imposed by various state authorities and a lack of seasonal workers entering Australia to fill job positions.

Global markets became less accessible, with impacts on travel and cargo transport, and upgraded biosecurity restrictions were imposed in some countries. On-site embedded training was able to continue, however registered training organisations (RTOs) were required to close classrooms and travel by trainers and assessors was often severely limited, hampering completion of training and apprenticeships.

In this challenging environment, the Meat IRC were pleased at the robust performance of the training package, which had the appropriate flexibility and content required to meet the continually changing conditions. Issues with training delivery and completion were not as a result of training package content, but external factors within some workplaces and within all relevant RTOs.

Given the evidence demonstrating that the training package is currently meeting industry needs, even in extreme circumstances, the Meat IRC believes it is now time to address the outstanding issues that will improve efficiency and meet current training standards. The way to achieve this is through a full review of the whole training package.

It is important to note that almost the whole training package is delivered through apprenticeships and substantial changes to the training package will have a severe impact on completion of apprenticeships unless the re-design of the training package is carefully undertaken. As a result, the Meat IRC is proposing a three-stage delivery of the full review, which will firstly establish the qualifications that will be the long-term foundation for training, substantially reducing the number of qualifications overall. This will be achieved by examining all core units in the qualifications within the project (four qualifications are excluded as having been recently updated). The second stage will then evaluate most of the elective units and it is expected that this will reduce unit numbers by approximately one third. The final stage is to re-design the apprenticeship qualifications related to retail meatworks and butchers.

This will mean a substantial transformation of the training package, which aims to provide simpler training and broader job outcomes with greater transferability of skills. The project is outlined in more detail under Section C Proposed Project.

Section A: Overview

Industry Developments

Please refer to the [2020 Annual Update](#), which identified several trends, challenges and opportunities that are still relevant now. Additional and emerging trends include:

The impacts of COVID-19

COVID-19 has substantially disrupted the Australian meat processing industry. It has also emphasised the importance of food security and the associated role of Australia's supply chains⁶.

IBISWorld rates 'meat processing' as one of the most exposed industries to the impacts of COVID-19 due to its very high labour intensity, operational difficulties associated with social distancing, highly exposed supply chain and few options for employees to work from home⁷. Given these factors, the lack of workplace impacts in meat works through most of Australia was pleasing, demonstrating a commitment by the Australian industry to applying high standards of safety in every aspect of operations.

The pandemic exposed some weaknesses that needed to be addressed, but overall showed that biosecurity measures in the meat industry were sufficient in the majority of workplaces. Victoria's meat processing businesses were linked to almost 300 cases of COVID-19, with the industry affected more than any other outside of aged care and education⁸. Shifts in less prepared workplaces were characterised by prolonged close workplace contact with colleagues, shared workspaces, shared transportation to and from the workplace, congregate housing, and frequent community contact with fellow workers. The nature of shift work in some workplaces entailed workers arriving and leaving the workplace at the same time each day (often overlapping with other workers), making it difficult to socially distance. The increasing casualisation of the workforce left some workers feeling that they had to show up for shifts in spite of any symptoms that could be linked to COVID-19.

Following the temporary closure of Cedar Meats in May⁹, WorkSafe issued guidance for Victorian meat and poultry processors based on advice provided by the Australian National Centre for Disease Control. The measures were not enforceable but offered recommendations for avoiding outbreak clusters, including to check workers' temperature prior to shifts, enact social distancing protocols and provide full personal protective equipment to workers^{10, 11}.

During stage 4 lockdown in greater Melbourne, the Victorian Premier announced that there would be workforce restrictions on the state's meat industry between 2 August and 13 September 2020. Abattoirs, excluding those with fewer than 25 employees, were required to reduce production by one-third, while poultry producers were to operate at only 80% capacity¹². Workforce capacity restrictions on the meat processing sector were removed from 9 November 2020¹³. Throughout this period, Victoria's 800 retail butchers were permitted to remain open.

⁶ ABC News (2020); *What one-third reduction in output at Victorian meat plants during coronavirus lockdown means for supermarkets*; <https://www.abc.net.au/news/2020-08-06/what-does-cut-in-victoria-abattoirs-output-mean-for-supermarkets/12530570>; viewed 27/11/2020.

⁷ IBISWorld (2020); *COVID-19 Impact Tool*

⁸ ABC News (2020); *Meatworks and coronavirus: The 'domino effect' from Victoria's abattoirs pushing COVID-19 case numbers higher*; <https://www.abc.net.au/news/2020-07-26/coronavirus-covid-19-meatworks-abattoirs-victoria/12490178>; viewed 27/11/2020.

⁹ ABC News (2020); *Coronavirus shutdown at Cedar Meats over as abattoir resumes full operations*; <https://www.abc.net.au/news/2020-05-27/coronavirus-shutdown-melbourne-cedar-meats-workers-return/12289970>; viewed 27/11/2020.

¹⁰ ABC News (2020); *Meatworks and coronavirus: The 'domino effect' from Victoria's abattoirs pushing COVID-19 case numbers higher*; <https://www.abc.net.au/news/2020-07-26/coronavirus-covid-19-meatworks-abattoirs-victoria/12490178>; viewed 27/11/2020.

¹¹ ABARES (2020); *Beef and veal: September quarter 2020*; <https://www.agriculture.gov.au/abares/research-topics/agricultural-outlook/beef>; viewed 27/11/2020.

¹² ABC News (2020); *What one-third reduction in output at Victorian meat plants during coronavirus lockdown means for supermarkets*; <https://www.abc.net.au/news/2020-08-06/what-does-cut-in-victoria-abattoirs-output-mean-for-supermarkets/12530570>; viewed 27/11/2020.

¹³ Australian Meat Industry Council (2020); *Victorian meat manufacturers back to full workforce*; <https://amic.org.au/victorian-meat-manufacturers-back-to-full-workforce/>; viewed 27/11/2020.

With over 90% of meat, fruit, vegetables, dairy and eggs sold in Australian supermarkets produced domestically, the pandemic has impacted on 'just-in-time' supply chains¹⁴. The Australian Meat Industry Council (AMIC) warned there could be less meat available for customers while abattoir restrictions were in place¹⁵ (even though there was some capacity for other states to compensate for Victorian shortfalls by increasing production¹⁶).

As the industry re-emerges following tighter restrictions, some employers are reporting difficulties in attracting and retaining workers. Teys Australia are struggling to fill vacant positions across their eight meat processing factories, most of which are in rural and regional locations. They are concerned that highly publicised outbreaks of COVID-19 in abattoirs and the Federal Government's JobSeeker program are keeping potential workers from applying for the available jobs¹⁷. Australia's largest meat processor, JBS, has also stated their concerns over an inability to access JobKeeper funding, which, in combination with extended drought and severe livestock supply shortages, led to them discontinuing 600 jobs¹⁸. In addition, record livestock prices (as producers are keeping their livestock to re-build herds after the long drought) have led to underemployment as abattoirs cancel workers' shifts to avoid operating at a loss¹⁹. Such concerns are reflected in AMIC's warning to Queensland's first new abattoir in 20 years that their \$37 million operation (supported by a loan from the Northern Australia Infrastructure Facility), which is due to open in the second half of 2021, may find it difficult to attract the 80 workers that will be required²⁰.

Despite the challenges of operating during COVID-19, domestic meat sales rose by 30% since the first lockdowns came into force. WA's biggest meat processor, V&V Walsh, saw sales increase by up to 50% over normal levels²¹. The continuing high demand for meat is indicative of the importance of the meat processing industry and the necessity for sustainable workplaces and skilled workers (see p.8 for comments on attracting new industry workers).

Domestic meat sales rose by 30% after the initial COVID-19 lockdowns came into force.

[ABC News, 5 November 2020]

The global meat market

IBISWorld report that meat processing revenue is falling due to turbulent export markets²². The COVID-19 pandemic has caused significant uncertainty in the global beef trade, both in major importing and exporting countries. China, one of Australia's most important beef markets, started testing imported food products for traces of COVID-19 in June 2020. In July, Australian beef exporters were reporting long delays at some Chinese ports as a result of the new testing regime²³.

Further tensions in trade relations with China emerged in August as Chinese authorities suspended imports of meat from John Dee abattoir due to concerns over chloramphenicol, a naturally occurring element, being found in its products²⁴.

¹⁴ R. Carey, M. Murphy & L. Alexandra (2020); *Our Food Supply Has Problems with Equity, Not Quantity*; <https://pursuit.unimelb.edu.au/articles/our-food-supply-has-problems-with-equity-not-quantity>; viewed 27/11/2020.

¹⁵ ABC News (2020); *Shoppers urged to be patient as Victorian coronavirus restrictions impact food supply*; <https://www.abc.net.au/news/2020-08-04/victorian-coronavirus-restrictions-impact-on-food-supply/12518136>; viewed 27/11/2020.

¹⁶ ABARES (2020); *Beef and veal: September quarter 2020*; <https://www.agriculture.gov.au/abares/research-topics/agricultural-outlook/beef>; viewed 27/11/2020.

¹⁷ ABC News (2020); *Tey's Australia blames JobSeeker for historically high vacancy rate*; <https://www.abc.net.au/news/2020-09-08/teys-australia-says-jobseeker-driving-record-high-vacancy-rate/12640036>; viewed 27/11/2020.

¹⁸ ABC News (2020); *JobKeeper blamed as Australia's biggest meat processor, JBS, sheds 600 jobs*; <https://www.abc.net.au/news/2020-09-09/jobkeeper-blamed-as-jbs-cuts-600-jobs-at-dinmore-plant/12646078>; viewed 27/11/2020.

¹⁹ ABC News (2020); *Tough times for meat processors battling trade restrictions and record livestock prices*; <https://www.abc.net.au/news/rural/2020-03-06/livestock-prices-result-in-tough-times-for-meat-processors/12021146>; viewed 27/11/2020.

²⁰ ABC News (2020); *Beef-farming Angus family confident boutique abattoir on their farm will cut costs, lift profits*; <https://www.abc.net.au/news/2020-09-06/queensland-couple-building-new-on-farm-abattoir/12626544>; viewed 27/11/2020.

²¹ ABC News (2020); *Red meat purchases increase by 30pc during COVID-19 lockdowns*; <https://www.abc.net.au/news/2020-11-05/red-meat-sales-increase-by-30pc-during-covid-lockdowns/12851928>; viewed 27/11/2020.

²² IBISWorld (2020); *Meat Processing in Australia - Australia Industry (ANZSIC) Report C1111*

²³ ABARES (2020); *Beef and veal: September quarter 2020*; <https://www.agriculture.gov.au/abares/research-topics/agricultural-outlook/beef>; viewed 27/11/2020.

²⁴ ABC News (2020); *John Dee abattoir suspended from exporting meat to China due to chloramphenicol discovery*; <https://www.abc.net.au/news/2020-08-28/abattoir-john-dee-suspended-from-exports-to-china/12605620>; viewed 27/11/2020.

The huge cull of Chinese pigs due to African swine fever, which continued to be detected in August 2020, is likely to sustain high animal protein prices in 2020-21²⁵. There could be further opportunities for Australian businesses to export pork to China, whose demand for alternative meats, such as beef and sheep is rising²⁶.

Modernising the meat export regulatory system

Critical government and industry action to modernise the Australian export meat inspection and regulatory system is underway following a \$328 million package announced by the Australian Government as part of the 2020-21 Budget²⁷. The 'Busting Congestion for Agricultural Exporters' package will fund reforms for Australian agricultural sectors, including the meat processing sector, to reduce unnecessary red tape, get products to export markets faster and support jobs in rural and remote Australia.

The four-year package is intended to support the development of a more competitive meat industry by reinforcing Australia's reputation as a producer of high-quality and safe meat, underpinned by a robust regulatory system. It also has objectives to bolster the meat processing sector's exports with a package of modernisation proposals developed in conjunction with, and strongly supported by, industry leaders, including AMIC. The measures put in place are reputed to be the most comprehensive reforms undertaken since the 2011 Australian Export Meat Inspection System was implemented.

The Government's 'Busting Congestion for Agricultural Exporters' package will support the development of a more competitive meat industry.

The 'Building a More Competitive Meat Industry' measure will enable export modernisation activities and introduce new regulatory assurance tools that reward high levels of compliance while determining areas for improvement. The measure includes key modernisation proposals such as:

- A digital modernisation roadmap for investing in technology and identifying opportunities to improve regulatory activities, e.g. integrating 'smart' technologies for verification activities and modernising administrative procedures.
- Post-mortem inspection and disposition modernisation activities to align modern food safety science with meat processing standards.
- Improvements to systems and processes, such as streamlined approval variations for Approved Arrangements, and assessing new technologies (e.g. smart-glasses, other virtual technologies and enhanced processing equipment) for introduction at export meat processing workplaces in a simplified and timely manner.

The National Skills Commission and attracting new industry workers

The National Skills Commission (NSC) was created in 2019 when much of the national debate focused on skills gaps; but, with the onset of COVID-19, the focus moved firmly onto managing skills surpluses and identifying training options for unemployed workers, especially young people, women and city-dwellers, who have been disproportionately affected²⁸. The meat processing industry may be able to capitalise on the availability of people who have been displaced from their usual work and are seeking new opportunities.

As well as highlighting reskilling and upskilling options for improving the prospects of people already performing an industry role, the NSC are promoting 'skills transferability' to facilitate clearer pathways between roles in diverse industries that require similar capabilities. The IRC notes that skills transferability is an important objective that must be considered as complementary to the primary role of vocational education and training in enabling potential workers to reach competency and be job-ready. This contention recognises that specific skills are required for jobs in order to complete tasks safely and effectively.

As the AgriFood industries recover from the immediate impacts of COVID-19 and look to value-add, more jobs

²⁵ ABARES (2020); *Beef and veal: September quarter 2020*; <https://www.agriculture.gov.au/abares/research-topics/agricultural-outlook/beef>; viewed 27/11/2020.

²⁶ Meat & Livestock Australia (2020); *State of the Industry Report 2020*

²⁷ Australian Government (2020); *Modernising the meat export regulatory system*; <https://www.awe.gov.au/news/media-releases/modernising-meat-export-regulatory-system>; viewed 27/11/2020.

²⁸ National Skills Commission (2020); *A snapshot in time: The Australian labour market and COVID-19*

will be created²⁹. Critical technical and transferable skills are, and will be, in high demand across the industry because of their importance in value-adding, as noted in the Australian Meat Industry Council submission to the National Agricultural Workforce Strategy:

“During the next 10 years the meat processing industry will require a smarter and more skilled workforce. It will need new skilled persons to undertake design, installation, calibration, maintenance/service, troubleshooting etc. There will be many new jobs generated.

It is likely that average wages will increase commensurate with greater skills – however there must be sufficient incentives/programs in place to attract and retain these skilled workers in the rural/regional areas, otherwise we risk a technology lag in non-metropolitan areas across the country.

Improvements in supply chain traceability and distribution (for example, shelf-life) will likely improve Australian exports and underpin ongoing sustainability of the sector (and jobs). Greater emphasis on end-to-end distribution and dedicated supply chains will likely result in greater investments in jobs to ensure these technical capabilities can be met.”

VET Qualifications & Employment Outcomes

The data and literature references presented in the [2020 Annual Update](#) remain relevant.

Over the last year, consultation with stakeholders has led to the identification of several key factors that led employers not to seek or favour VET graduates, including:

- Absence of legislative, regulatory or licensing requirements governing an occupation or industry³⁰.
- Lack of value assigned to VET within industry cultures and networks³¹.
- Belief that formal credentials are relevant for career establishers but not for higher level roles filled by more experienced candidates³².
- Dissatisfaction with the work-readiness of previously employed VET graduates³³, especially those whose learning did not include a workplace-based component³⁴.
- Abundance of alternatives to VET recognised by employers.
- Worker shortages, especially within small businesses in RRR areas³⁵, which leads to employers being often forced to hire candidates who do not possess the desired qualifications, but who subsequently receive informal, on-the-job training.

The IRC notes, however, there is strong evidence that exposure to and engagement with quality VET-related outcomes are indicators of the system being valued and regarded as a yardstick by employers. Data released from NCVER’s survey of employers’ use and views of the VET system³⁶ shows that, of ‘Manufacturing’ (including ‘Meat Processing’) employers who are ‘satisfied with training as a way of meeting their skill needs’, 72% mandate ‘vocational qualifications as a job requirement’ (which is equal to the all-industry average).

There is further evidence that government supported and funded programs that encourage partnerships between training providers and industry raise the profile of VET – and so employers’ receptiveness to hiring

²⁹ J. Azarias, R. Nettle & J. Williams (2020); *National Agricultural Workforce Strategy: Learning to excel*; National Agricultural Labour Advisory Committee, Canberra, December; p.93

³⁰ L. Wheelahan & G. Moodie (2017); Vocational education qualifications’ roles in pathways to work in liberal market economies; *Journal of Vocational Education & Training* 69 (1): 10-27; p.13

³¹ Parliament of Victoria (2012); *Inquiry into agricultural education and training in Victoria*; p.41

³² A. Hall, L. Turner & S. Kilpatrick (2019); Understanding Tasmanian dairy farmer adoption of pasture management practices: a Theory of Planned Behaviour approach; *Animal Production Science*; CSIRO Publishing; <https://doi.org/10.1071/AN18321>

³³ National Farmers Federation (2019); *Submission to Hon Steven Joyce: Expert review of Australia’s vocational education and training system*; 25 January 2019; p.10

³⁴ C. Smith, S. Ferns, L. Russell, Leoni & P. Cretchley (2014); *The impact of work integrated learning on student work-readiness*; Sydney, New South Wales: Office for Learning and Teaching.

³⁵ S. Gelade & T. Fox (2008); *Reality check - Matching training to the needs of regional Australia*; NCVER, Adelaide; p.33

³⁶ NCVER (2019); *Australian vocational education and training statistics: Employers’ use and views of the VET system 2019*; NCVER, Adelaide.

graduates – due to the successful outcomes facilitated for all stakeholders. A number of initiatives are successfully promoting pathways for graduates and increasing employers’ engagement with VET.

Other Training Used by Employers

The data and literature references presented in the [2020 Annual Update](#) remain relevant.

Enrolment Levels

The data and literature references presented in the [2020 Annual Update](#) remain relevant.

Consultation undertaken on behalf of the IRC throughout 2020 has identified key information regarding the low use of qualifications, including:

- Unmet demand for ‘flexible’ training
- Negative industry perceptions of the VET system and training delivery
- Emerging preference for short courses and micro-credentials
- A lack of trainers demonstrating both teaching excellence and industry expertise
- RTO viability challenges, especially relating to:
 - compliance
 - training and assessment materials development
 - thin markets in RRR areas
 - biosecurity, seasonality and production times
 - government funding
 - creating and maintaining industry partnerships.

RTO delivery issues

As stated in the 2020 Annual Update, RTOs have struggled to offer viable training delivery in regional areas due, in part, to a lack of qualified and available trainers and assessors. Additional costs, such as adhering to industry regulation and safety requirements and travelling to dispersed workplaces, have been prohibitive for many RTOs, and now very few have AMP qualifications on scope. In lieu of available training, employers often turn to non-accredited options, which serves to further obscure demand for formal training.

Table 1: RTO delivery issues

Qualification	2015	2016	2017	2018	2019
AMP20216- Certificate II in Meat Processing (Smallgoods)	0	0	0	0	0
AMP20415- Certificate II in Meat Processing (Meat Retailing)	39	85	117	54	62
AMP30716- Certificate III in Meat Processing (Quality Assurance)	0	0	13	23	48
AMP31116- Certificate III in Meat Processing (Livestock Handling)	0	0	33	16	13
AMP31216- Certificate III in Meat Processing (Packing Operations)	0	0	2	0	0
AMP40215- Certificate IV in Meat Processing (General)	57	71	18	2	3
AMP80115- Graduate Certificate in Agribusiness	0	0	0	0	0
AMP80215- Graduate Diploma of Agribusiness	0	0	9	22	42

Source: NCVET VOCSTATS, TVA program enrolments 2015-19

PLEASE NOTE: Qualification data includes enrolments in superseded versions where available

AMP Training Package products in project stage (commissioned by AISC)

The following qualifications are all part of current projects commissioned by the AISC, which were founded upon extensive industry consultation and evidence of demand for these training package products subject to their being reviewed and developed. For more information, please go to <https://www.skillsimpact.com.au/projects/>.

Table 2: AMP Training Package products in project stage (commissioned by AISC)

Qualification	2015	2016	2017	2018	2019
AMP30416- Certificate III in Meat Processing (Rendering)	33	43	13	3	5
AMP50115- Diploma of Meat Processing (Meat Retailing)	3	4	0	0	0
AMP50215- Diploma of Meat Processing	32	6	24	18	13
AMP60115- Advanced Diploma of Meat Processing	0	0	0	4	0

Source: NCVER VOCSTATS, TVA program enrolments 2015-19

PLEASE NOTE: Qualification data includes enrolments in superseded versions where available

Reasons for Non-Completion

The data and literature references presented in the [2020 Annual Update](#) remain relevant.

Workplace-Based Training & Assessment and Mandatory Work Placements

The AMP Training Package is predominantly based on mandatory workplace requirements as part of apprenticeships and traineeships. The challenges of safely accessing workplaces to deliver training are compounded by many RTOs' inability to plan and deliver viable training and assessment strategies in light of the many restrictions in place. Learner retention is compromised by increasingly expensive training delivery, lay-offs, social distancing requirements on-campus and restrictions on travel limiting the number of trainers and assessors that can be sent to relevant regional, rural and remote (RRR) areas. Generally, these issues have had more of an impact than mandatory work placements, which remain strongly supported by industry where they are appropriate. Alternatives implemented by RTOs, including online delivery, have been met with some dissatisfaction by learners who are finding it harder to submit assessments considering increased demands on their time, especially from families, and difficult study conditions while learning from home.

Other major issues relate to peoples' loss of employment and their associated apprenticeship status. Due to diminishing prices and disrupted export market, some employers are retrenching staff, including those with formal VET training arrangements. Not only do economic downturns increase the rate of apprentices and trainees who are unable to complete qualifications because of job loss or redundancy³⁷, research also shows that, when compared to similar cohorts, those apprentices and trainees made redundant are also more likely to be unemployed nine months after losing their job³⁸. Due to restricted labour market opportunities, many displaced individuals are choosing to pursue employment and study options in other fields rather than wait for a possible resumption of their previous arrangements³⁹.

Cross-Sector Units

The response presented in the [2020 Annual Update](#) remains relevant. There is no additional information to add at this time.

³⁷ P. Hurley (2020); *The impact of coronavirus on apprentices and trainees*; Mitchell Institute for Education and Health Policy, Victoria University.

³⁸ T. Karmel & D. Oliver (2011); *Effect of the downturn on apprentices and trainees*; NCVER, Adelaide

³⁹ National Skills Commission (2020); *A snapshot in time: The Australian labour market and COVID-19*

Changes to Skill Requirements

Currently, the Meat IRC has not identified any urgent or important needs for the industry that have not previously been addressed over the last few years.

The Meat IRC believes that this is an ideal time to commence a full review of the AMP Training Package to address issues related to streamlining, duplication, training standards, delivery issues and complexity. As a result, the IRC has approved a project that reviews the whole of the training package in a three stage process.

Completing the work over stages is important to minimise the impacts of the work on learners, RTOs and employers, particularly in relation to apprenticeships. The work being undertaken is substantial and is expected to reduce the current training package size substantially.

Apprenticeship & Traineeship Barriers

The data and literature references presented in the [2020 Annual Update](#) remain relevant. Likewise, barriers to VET delivery and the reasons for industry's low engagement with the system, detailed in questions 2., 4. and 5., should also be considered relevant here.

Industry-specific data relating to the Australian Government's \$2 billion JobTrainer skills package, which includes objectives to attract new apprentices and keep existing apprentices in jobs, has yet to be released. Its design is in part a response to research⁴⁰ forecasting that COVID-19 will cause apprenticeship/traineeship commencements to decrease over the next few years because they have fallen during past economic downturns, with struggling employers reluctant to commit to three- to four-year apprenticeship arrangements⁴¹. JobTrainer anticipates such challenges and will further be supported by industry strategies to expand apprenticeship and traineeship opportunities.

The IRC will assess the outcomes of such initiatives as information becomes available.

Other Relevant Activities

The IRC has been busy during 2020, with many responsibilities bestowed upon it, requiring extensive time and resources, for dealing with the impacts of COVID-19, workforce, industry and trade issues.

The IRC has assisted the AISC and the AISC Emergency Response Sub-Committee (ERSC) by seeking industry input and responding to a number of requests for information. These requests have taken place in several stages.

Immediate crisis response:

- Identification of immediate training issues relating to workplace and campus-based training (completed April 2020).
- Identification of skills needs and delivery challenges for essential workforces (completed May 2020).

Supporting training for worker movement and potential surge workforces to meet current needs:

- Identification of existing training products and potential surge workforces (completed May 2020).
- Analysis of available infection control training (completed June 2020).

Support for workforce recovery:

- Critical Response Projects to create pathways for displaced workers (submitted July 2020, in

⁴⁰ P. Hurley (2020); *The impact of coronavirus on apprentices and trainees*; Mitchell Institute for Education and Health Policy, Victoria University.

⁴¹ P. Hurley (2020); *The impact of coronavirus on apprentices and trainees*; Mitchell Institute for Education and Health Policy, Victoria University.

progress).

- Promotion of pathways for displaced workers (first projects submitted July 2020, under consideration).

Mandatory Work Placements Analysis and Response:

- Initial analysis of units requiring mandatory work placements or assessment/training conditions that were likely to require the use of physical workspaces, most likely in workplaces (completed April 2020).
- Analysis of units within qualifications with high levels of enrolments (completed October and November 2020).

The IRC is extremely pleased to report that the current *AMP Training Package* is robustly standing up to the additional logistical challenges brought about by COVID-19. Since the establishment of the IRC, the components of the training package that have undergone review have enabled:

- Flexible options for training and assessment to meet fluid and urgent industry needs.
- Coverage of the major training requirements for all industries associated with the training package.
- Minimal requirements for mandatory work placements or onsite training and assessment (there are multiple delivery mode options), while recognising that many units cannot be delivered virtually or online.
- Extensive and suitable options of recognised skill sets and units for use by the states that have decided to develop their own training offerings outside the national system (without IRC consultation).

The IRC has also responded to a Ministers' request to delete units and qualifications which had zero enrolments in the years 2017 to 2019. Each of the units identified by the Ministers were only first released in June 2019 and the IRC advised that more time is necessary to allow training to be delivered by RTOs.

The additional work detailed above has required that the IRC meet more regularly and that members conduct many more additional "out of session" discussions and consultations than in previous years. This has been achieved without additional IRC members or secretariat support. The Chair of the IRC would like to express their gratitude to all IRC members and stakeholders who have given up so much of their time and energy in 2020 to complete this important work.

IRC Sign-Off

Signed on behalf of the Meat Industry Reference Committee

Name of Chair	Michael Bayer
Signature of Chair	
Date	09/07/2021

Section B: Ongoing Consultation

Details of industry consultation undertaken by IRC members and Skills Impact, including with rural, regional and remote stakeholders will be included in the final document that is submitted to the Australian Industry and Skills Committee (AISC). Once submitted, the final document will also be published on the Skills Impact website.

Entity Name	Sector	State	Rural/ Regional/ Remote	Ongoing engagement	Industry intelligence	Promotion of VET	Networks & Partnerships
Australian Renderers Association (ARA)	Industry Association	National	Yes	✓	✓	✓	✓
Australian Lot Feeders' Association (ALFA)	Industry Association	National	Yes	✓			✓
Australasian Meat Industry Employees Union (AMIEU)	Industry Association	National	Yes	✓	✓		✓
Australian Meat Industry Council (AMIC)	Industry Association	National	Yes	✓	✓		✓
Australian Pork Limited (APL)	Industry Association	National	Yes	✓	✓		✓
Meat and Livestock Australia (MLA)	Industry Association	National	Yes	✓	✓		✓
Australian Chicken Meat Federation	Industry Association	National	Yes	✓	✓		✓
Australian Country Choice	Commercial Business	Qld	No		✓		✓
Baiada	Commercial Business	National	Yes	✓	✓		✓
Bindaree Beef	Commercial Business	NSW	Yes	✓	✓		✓
BE Campbell	Commercial Business	NSW	Yes	✓	✓		✓
Charles Darwin University	RTO private	NT	Yes	✓	✓		✓
VIC STA	Regulator	Vic	Yes	✓	✓	✓	✓
CHM Alliance	RTO private	Qld	No	✓	✓	✓	✓
Department of Agriculture	Government	National	Yes	✓	✓		✓
DPIPWE Tas	Government	Tas	Yes		✓		✓
Eversons Food	Commercial Business	NSW	Yes		✓		✓
FGM Consultants	RTO private	Vic	Yes	✓	✓	✓	✓
Food Safety Operations	RTO private	Qld	Yes	✓	✓	✓	✓
Game Meat Processing	Commercial Business	Qld	Yes		✓		✓
Hillside Meat Processors	Commercial Business	WA	Yes		✓		✓
Ingham's	Commercial Business	National	Yes	✓	✓		✓

Entity Name	Sector	State	Rural/ Regional/ Remote	Ongoing engagement	Industry intelligence	Promotion of VET	Networks & Partnerships
JBS Australia	Commercial Business	National	Yes	✓	✓		✓
Kangaroo Industry Association	Industry Association	National	Yes		✓		✓
Luv-a-Duck	Commercial Business	Vic	Yes		✓		✓
M&J Chickens	Commercial Business	NSW	No		✓		✓
Macro Meats	Commercial Business	SA	Yes	✓	✓		✓
NSW TAFE	RTO private	NSW	Yes		✓		✓
Oakly Beef Export	Commercial Business	Qld	Yes	✓	✓		✓
Poultry Hub	RTO private	NSW	Yes		✓		✓
Red Meat Advisory Council	Industry Association	National	Yes		✓		✓
Response Consulting	RTO private	National	Yes	✓	✓		✓
Samex Peterborough	Commercial Business	SA	Yes	✓	✓		✓
TAFE QLD	RTO private	Qld	Yes	✓	✓		✓
TAFE TAS	RTO private	Tas	Yes	✓	✓		✓
Teys Australia	Commercial Business	National	Yes	✓	✓		✓
Total Quality Management Systems	RTO Private	Vic	Yes		✓		✓
Training Solutions Australia	RTO Private	WA	Yes		✓		✓
VERTO	RTO Private	NSW	Yes		✓		✓
Leisha Hewitt, poultry auditor and animal welfare consultant	Commercial Business	Tas	Yes	✓	✓		✓
Natasha Wing Consultancy	Commercial Business	NSW	Yes	✓	✓		✓
NSW Department of Primary Industries	Government	NSW	Yes	✓	✓		✓

Section C: Proposed Project

2021–2022 Project Details

Meat Processing Skills Review Project

Description

This project proposes a full review of the AMP Australian Meat Processing Training Package, to take place over three stages (approximately three years). The training package has undergone a series of small changes over the last five years, designed to meet specific industry needs. It is designed for workplace-based delivery and includes elements that are no longer considered best practice in the VET system. The aim of this project is to review all 24 qualifications, 446 units of competency and 75 skill sets so they not only meet Training Package Standards, but so they are more user friendly for employers, learners and registered training providers (RTOs). This work will reduce duplication across the training package, improve the ability for employers and learners to choose the appropriate program of learning, and will simplify RTO delivery. The first stage of this project is proposed to take place in 2021-22 and will include the review of all general meat processing qualifications and core units to create qualifications that can have specialist skills or job role streams added as they are developed. This will also allow for groupings of job roles at relevant AQF levels within single qualifications.

Case for Change

Rationale for Change

The Meat IRC recommends that a full training package review takes place over three (3) stages. This Case for Change is for Stage 1 of the proposed review. The project will review and streamline the AMP Training Package while minimising disruption to current apprenticeships and training delivery. The purpose is to meet the updated program priorities (as outlined in the Training Package Development and Endorsement Process Policy) and meet Training Package Standards, by:

- Reducing duplication and removing obsolete training products
- Removing training products that are under-used
- Simplifying the training package to ensure that employers, learners and RTOs understand and can be more effectively informed of available choices
- Improving the ability of learners to work across sectors
- Improving RTO delivery and potentially increase enrolments through removal of elements of the Training Package that do not comply with current Training Package standards

The AMP Training package currently consists of 24 qualifications and 446 AMP Units of Competency. At the completion of all three stages of the project, it is expected that the training package could be streamlined into approximately 9-15 qualifications and fewer than 300 AMP units. The review will cover 20 of the existing 24 qualifications (two were updated and approved in February 2021 and two higher level qualifications will not be affected by the project).

The AMP Training Package is structured as a progressive set of qualifications, with specific qualifications in industry areas. Elements of the Training Package have been designed to provide specific skills for the multiplicity of animals and techniques covered by the Meat industry. Potentially shared skills have not been appropriately identified. As a result, in two Certificate II level qualifications, there are more than 100 units available as identified options with completion of 14 and 9 units respectively required to achieve the full qualification.

Proceeding to review the training package through the usual "qualification" approach is likely to create major delivery and enrolment issues, especially regarding apprenticeships. It is also likely to take significantly longer to address the issues and achieve the desired outcomes.

Instead, the Meat IRC proposes that the development be undertaken over three stages. This will allow for some baseline qualifications at each AQF level to be developed in the first stage, based on the critical core units and applicable streams included to replace the current sector-specific qualifications. Using the staged approach will allow for more effective identification of job roles and specialisations within job roles, as a greater variety of subject matter experts from across sectors will need to be consulted.

The IRC is recommending that work be undertaken in three stages:

Stage 1: Review the General Qualifications and Core Units to create baseline qualifications which can then have specialist streams added as they are developed. This will also allow for groupings of job roles at relevant AQF levels within single qualifications: this is likely to result in a significant reduction in qualifications

Stage 2: Review components based on identified industry sectors: this is likely to result in a significant reduction in units and development of Skill Sets

Stage 3: review the qualifications and training relating to retail operations and specialist areas: this is likely to result in reductions in qualifications and units, as well as development of Skill Sets

Using the staged approach will allow for more effective identification of job roles and specialisations within job roles, as a greater variety of subject matter experts from across sectors will need to be consulted.

If the AISC approves Stage 1 of the project, desired outcomes will not be achieved unless all three stages are completed. While Stage 1 will reduce qualifications, to allow ongoing delivery, there will initially be a need to share most of the existing Units of Competency across fewer qualifications (potentially leading to a short-term increase in available electives per qualification). Stage 2 will focus on streamlining Units of Competency by examining all electives and non-core imported units, which will result in a major reduction of units (likely between 25-40%). Stage 3 will focus on the set of current qualifications that are associated with the retail/butcher meat sector, which has a highly varied employer grouping from large retailers and smallgoods manufacturers, through to local butcher operations. This will ensure that unintended consequences to apprenticeships and training in this area are minimised. This will also lead to a further reduction in qualifications and units.

It is the current intention that the Case for Change for each stage of the project would be submitted at the same time as the Case for Endorsement of the preceding stage, allowing flexibility in meeting industry needs and ensuring each Case for Change builds on the actual outcomes of previous work.

If the AISC does not approve the proposal, the Meat IRC will submit Cases for Change based on a qualifications approach. It is the view of the IRC that this mechanism will take significantly longer to improve the Training Package, and create a result that is less amenable to the possibilities of clustering qualifications in the longer term. This is because the current underlying structure of the Training Package is resistant to the process of potential clustering, and the underlying structure can only be addressed through a broad-based review.

Evidence for Change

The Meat IRC has submitted Cases for Change previously that have addressed priority areas for the industry and for the AISC. Examples are:

- Industry need: Halal, game harvest auditing and animal welfare skills
- Low enrolment areas: Diploma and Advanced Diploma of Meat Processing and Meat Rendering.

The Meat IRC now believes the time is right to address the remaining priorities as outlined in the standards, and in particular:

- Change the structure and reduce the size of the training package
- Eliminate duplication
- Address compliance issues that have existed for some time that have meant that it does not meet

current training package standards, notably:

- nesting of qualifications;
- AQF misalignment;
- core units at multiple levels; and
- the points allocation system used in some qualifications.

Consideration of Existing Products

The Case for Change is based on review of existing products. New products are developed where:

- The change to the qualification/unit is so significant as to constitute a new training product.
- New and emerging skills and techniques are identified, especially regarding the increasing role of technology.
- Cross-sector units and imported units do not meet industry needs.

Although new products may be developed, each stage of the project will deliver a training package that has reduced numbers of qualifications and/or units overall.

Approach to Streamlining and Rationalisation of the Training Products Being Reviewed

It is a critical outcome of this project that it results in a significantly streamlined training package which is also able to meet any updated needs relating to qualifications and training packages in the future. There is an expectation that the project can result in:

- Reducing the current 24 qualifications to somewhere between 9 and 15.
- Reducing the overall number of units from 446 to fewer than 300 (and potentially below 250).
- Increase the number of Skill Sets by more than 10.

There will also be consideration of the potential for at least one qualification to be delivered through a different training package.

Stakeholder Consultation

Stakeholder consultation undertaken in the development of Case for Change

In addition to identifying stakeholders through desktop research, the IRC recommended industry specialists to be consulted during the development of this Case for Change. Existing contacts of IRC members were approached first, and those individuals facilitated introductions to other interested parties (a 'snowballing' sampling method). Several of these groups have expressed support for the proposed qualification specialisation or skill set and have registered their interest in contributing to further consultation activities.

Evidence of Industry Support

Industry support for the proposed qualification specialisation or skill set was elicited through extensive email and telephone contact with a wide range of stakeholders, many of whom have stated their support for this project and willingness to contribute further.

Proposed stakeholder consultation strategy for project

IRC members and Skills Impact will continue to identify and target stakeholders for participation through existing and new networks. Peak organisations, enterprises and training providers will also be identified to assist with promoting opportunities to contribute, through internal and external media such as intranet portals, newsletters etc.

COVID-19 restrictions will impact on the possible methods of consultation throughout the various stages of this project; for example, snap border closures and state-based lockdowns will influence the methods of consultation. Project risk management strategies will include contingency plans for unforeseen restrictions,

including alternative engagement mediums, such as webinars. Every effort will be taken to reach those stakeholders in regional, rural and remote (RRR) areas, where there may be poor connectivity.

Representatives from small, medium and large enterprises, along with representatives from training organisations and Indigenous communities will form Subject Matter Expert Working Groups.

For each sector stage, initial development work will be undertaken in consultation with relevant Subject Matter Experts (SMEs). Drafts will be created and reviewed by the experts. The drafts will then be made available for public consultation and feedback, with consultation sessions to be held around Australia (where possible). Following this, the final drafts will be validated through further consultation and Quality Assurance processes. The Case for Endorsement will be finalised and submitted to the IRCs for review and final approval, prior to submission to the AISC.

Licensing or regulatory linkages

As this is a whole of Training Package review, all legislative, regulatory and licensing provisions will need to be considered during development. All states and territories have meat hygiene authorities and the regulatory authority is based on legislation that applies Australian Standards, in particular, AS4696:2007 Hygienic production and transportation of meat and meat products for human consumption. Food authorities then apply the Australia New Zealand Food Standards Code, although the AS 4696:2007 Hygienic production and transportation of meat and meat products for human consumption.

Other legislation covering the meat industry includes The Biosecurity Act 2015 and the Export Control Act 1982. There are 11 additional Australian and NZ Standards applied to the meat industry.

There is a licensed occupation of Meat Inspector (Meat Safety).

Project Implementation

Prioritisation Category

- Stage 1: Complex project expected to take up to 18 months
 - Stage 2 (if approved): Complex project expected to take up to 18 months
 - Stage 3 (if approved): Routine project expected to take up to 12 months
- Only one qualification in the project is listed for Fast-track development. Industry consultation has not identified the need for this qualification to undergo an urgent review at this time. It has been included in Stage 1 of the project.
- There are no qualifications listed as Marked for Deletion in the project. Of the three qualifications listed as Marked for Deletion in the list of December 2020:
 - One qualification has been deleted as part of the streamlining project
 - One qualification has been updated and was endorsed by the AISC for Minister's Approval at the meeting in February 2021
 - One qualification has evidence of enrolments in 2021

Project Milestones

Key project milestones for Stage 1 include:

Months	Activity
1-3	Project planning and briefing, identification of experts and consultation with IRCs
4-7	Workshops with subject matter experts including research and functional analysis
8-9	Development of draft documents in preparation for public consultation
10-12	Public Consultation
13-15	Review of public consultation and Equity Review
16-17	National public validation of final draft qualifications, skill sets and units
18	Approval of Case for endorsement to IRCs and submission to AISC

- **Stage 2** Commencement expected August 2022
- **Stage 3** Commencement expected November 2023

Summary of Components

Component	To be reviewed	To be updated	To be deleted
Units	125	Up to 125	Up to 40
Qualifications	11	Up to 8	Up to 8
Skill Sets	0		

Delivery or Implementation Issues

There are significant delivery issues associated with the completion of this project. Almost all of the Training Package is delivered through apprenticeships. Workplace employment and training is essential in the industry. Tours of facilities alone usually result in significant withdrawals of applications for apprenticeships (up to 50% of a small cohort is not unusual) and the work involves dealing with live animals, sharp and dangerous equipment, biosecurity, traceability and work safety. While knowledge elements can be delivered virtually or in the classroom, the model used within most of the non-retail sector of the meat industry is to embed trainers in workplaces or have them visit onsite. In the retail sector, significant disruption to workplaces occur when RTOs schedule intensive classroom sessions without consideration of employer needs and industry work cycles.

The current structure of the Training Package includes elements built around achieving similar outcomes for different meats. For example, there is a differentiation between making cuts on carcasses of small animals and large animals. Within each of these may be a requirement to make cuts on more than one type of large or small animal. As the anatomy of each animal is different, so do the cuts need to be different and the method of recovering the meat product, while using the same fundamental cutting skill, also differs markedly. Some elements of the apprenticeships have been built across different levels of the AQF. While this may have a purpose in terms of training delivery, it is not compliant with current Training Package standards. Similarly, to ensure that learners have enough different experiences to gain competency, a points allocation system is used for each unit, with the expectation that learners complete a minimum number of units to achieve the required number of points. Again, while this may have an important purpose in terms of training delivery, it is not compliant with current Training Package standards.

One of the major difficulties reported by RTOs is in choosing the correct products from the numerous elective units in the Certificates II and III qualifications. While trying to meet industry needs, there are also issues related to viability and regulation, particularly in choosing what to put on-scope. These issues need to be addressed, however because meat training takes place in the workplace, there is a significant amount of tailoring to meet local employer needs. With 166 AMP units in Certificate II Meat Processing (Abattoirs) requiring completion of a minimum 9 units (6 core, 3 elective), there may be enormous differences in the ways that delivery of that qualification look across each individual RTO.

These elements make the design of this project critical and have been important considerations for the IRC. It is the view of the Meat IRC that the only way the outcomes can be achieved is through a staged, broad review which initially designs baseline qualifications which can then be built upon in modular fashion to create more effective delivery outcomes.

Implementing the Skills Minister's Priority Reforms for Training Packages (2015 and October 2020)

Ensure that more information about industry's expectations of training delivery is available to training providers to improve their delivery and to consumers to enable more informed course choices

The project will streamline and simplify the training package, in particular by removing significant numbers of units existing across multiple AQF levels and eliminating duplication.

Ensure the training system better supports individuals to move more easily between related occupations

The project will merge and reduce qualifications, adding specialist streams within the merged qualifications, and providing upskilling Skill Sets

Improve the efficiency of the training system by creating units that can be owned and used by multiple industry sectors

The review will allow for the incorporation of cross-sector and imported units relevant to skills in the Meat industry. Current training products used in AHC, FBP, SFI, ACM and other training packages will also be considered. In addition, consideration will be given to whether training can take place under a different training package using existing training with some specialisation added from AMP

Foster greater recognition of skill sets and work with industry to support their implementation

The Training Package review will result in more modular construction and will include additional Skill Sets, notably for upskilling given the critical importance of all workers having underlying skills for biosecurity, animal welfare and work safety reasons.

This Case for Change was agreed to by the Meat IRC

Name of Chair	Michael Bayer
Signature of Chair	
Date	11/05/2021