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SURVEY OF HERD IMPROVEMENT SERVICES

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SURVEY OF HERD IMPROVEMENT SERVICES

EXECUTIVE SUMMARY

A Workshop Discussion Paper on Herd Improvement (HI) services was prepared for consideration at a Workshop to be conducted by the NHIA for the Herd Improvement industry later this year.

The Discussion Paper sets out the views of dairyfarmers on why they do and why they do not use Herd Improvement services, what improvements should be made to current HI services, and what other services the HI industry could provide to assist dairyfarmers better manage their businesses.

The views of dairyfarmers on HI services were sourced through the conduct of 9 Focus Groups consisting of HI service users throughout the three main dairying regions of Victoria, and individual interviews of dairyfarmers who do not use HI services in the areas where Focus Groups were conducted. The information obtained from the Focus Groups and individual interviews in Victoria was supplemented by views on HI services provided by interstate HI organisations.

Prior to the commencement of the survey of dairyfarmer views on HI services, a review of previous research undertaken by ABARE on Herd Recording's economic contribution, by Monash University on opportunities for HI service providers, and the outcome of a workshop conducted by NHIA on reducing the hassle of herd Test Day. The research undertaken did not focus on what non HI services could be provided by HI Centres and apart from the industry workshop conducted by NHIA in 1995, the research did not suggest any improvements to current HI services or provide qualitative evidence why farmers did not HR.

The Workshop Discussion Paper summarises the current status of the use by dairyfarmers of HI services and the views of dairyfarmers on improvements to HI services and additional services that could be provided by the HI industry. The Discussion Paper covers views on herd recording, artificial breeding, cow identification, calf dehorning, HI supplies, and computers, internet and software.

Key observations from the Focus Groups were:

- ❑ Dairyfarmers see HR as a necessary tool to control their BMCC through periodic ISCC reports in order to maximise milk quality payment
- ❑ Herd Testing is still perceived to be a hassle and there is a need to simplify the operation
- ❑ Automation of Herd Testing at the farm is not perceived by the vast majority to have a cost benefit at current cost levels
- ❑ The increasing number of computers on farms is leading farmers to require herd data to be instantly available and there is strong interest in the development of low cost pocket computer input and read out devices
- ❑ A key concern of many farmers is the low fertility rate achieved and there is strong support to undertake research to improve the conception rate

- Dairyfarmers use multiple methods (usually 3 to 4 methods) of calf and cow identification as there is no single method that meets all requirements
- Only one third of farmers have applied the NLIS electronic ear tag although most farmers stated they intend to put the tags on calves and cows
- There is very little use being made of the NLIS tag for integration into a competent herd identification and management system
- There is a need for a good quality labour service including relief milkers, farm employees, and farm owner/manager relief, and a labour provision service could be provided by local HI Centres

INTRODUCTION

This report has been prepared for the National Herd Improvement Association of Australia Inc (NHIA), to provide background information for a proposed industry workshop on how to increase the overall size of the Herd Improvement (HI) market and how to capture more of the HI client's business. The objective of the workshop is to assist HI industry service providers develop their businesses and enhance their financial viability.

The report sets out the findings from a survey of users and non-users of HI services that assesses :

- (a) why dairyfarmers use HI services,
- (b) why dairyfarmers do not use HI services,
- (c) what improvements could be made to existing HI services
- (d) what other services dairyfarmers consider might be suitably provided/made available by organisations providing HI services.

Background to assignment

As the number of dairyfarms are continuing to decline at around 1% to 1.5% per annum, market growth opportunities for AB semen and herd recording services are limited to the growth in cow population which has increased at around 3% to 4% per annum over the last 10 years. Any market growth for the HI industry service providers above the increase in cow population, will be at the expense of competitors, or will come through additional services. There appears little opportunity to significantly increase the number of dairyfarmers using AB (near market saturation) and herd recording services (currently at a historic static penetration level).

The impact of future dairy industry development on Herd Improvement services is anticipated to be linked to the following projected trends and developments over the medium to long term:

- Fewer dairyfarms but with herds and farms increasing in scale of operation requiring more specialised services to optimise herd performance
- There will be only a marginal increase in the total number of dairy cows in Australia
- Dairyfarms will continue to be under cost pressure to remain viable against the export market return
- Technology changes will influence the delivery of HI services, eg information technology, gene technology and milk testing technology
- Greater emphasis will be placed on Quality Control to assure the whole supply chain for milk and dairy products with the facility for trace back

These developments will mean that the HI industry will be forced to collaborate to apply the necessary resources to take advantage of new technology and exploit market place opportunities to improve current herd improvement services to dairyfarms and develop new services.

The key industry development that is expected to drive change at the farm level and drive change for the HI service provider, will be the National Livestock Identification System (NLIS), which is anticipated in the medium term, to result in the compulsory electronic identification of all cattle in Australia.

It is anticipated that the dairy industry will be early adopters of the NLIS and associated technology with every dairyfarm having each cow with an electronic identification capability that can be utilised for herd recording and other uses by dairyfarmers. The key drivers for 100% adoption of this technology will be export market QA requirements (including farm and animal trace-back and national exotic disease control plan requirements by the meat and cattle industry), and electronic farm management systems (including herd recording).

Commercial pressures will ultimately drive the interest and desire for a meaningful rationalisation of the HI industry. It is considered that these pressures will emerge in the medium time span from the roll out of the NLIS, the progressive adoption of the low cost milk meter, and the introduction of direct selling of semen.

Following the 2001 NHIA Conference at which issues concerning HI industry costs and the market for HI industry services were discussed, and in consideration of the NHIA Board's strategy to undertake activities to strengthen the operations of HI providers, NHIA held a meeting of selected HI industry participants on 28th November 2001 to discuss the issue of expanding the market for HI services and scope how a workshop could be conducted for the industry on this issue.

As a result of this meeting it was considered that information on the use and non-use of HI services would be of benefit to the conduct of the workshop. Accordingly it was proposed by NHIA that a survey be conducted by an independent consultant of HI service users and non-users, to provide for the proposed workshop, a broad understanding of why farmers use and do not use HI services, particularly Herd Recording, and what other services farmers believe might be suitably provided by HI service organisations.

Glossary of terms

For the purposes of brevity the following acronyms and definitions have been used in the text of this report:

HI	Herd Improvement (all services used by farmers to improve herd production and quality of milk produced through genetic gain and production management)
HI Centre	The local HI Centre providing HI services including Co-operatives and Private Businesses (Businesses that are more than a sole proprietor)
HR	Herd Recording (the recording and reporting of a cow's production)
HT	Herd Testing (the sampling and analysis of a cow's am or pm milk production for HR purposes)
NHIA	National Herd Improvement Association
PI	Production Index
PT	Progeny Testing

TERMS OF REFERENCE

The terms of reference for the conduct of the assignment and the preparation of this report for the NHIA are set out at Appendix A and summarised below.

1. Undertake a literature research of past reports on the use and development of HI services.
2. Prepare a preliminary draft of the methodology to be used to conduct the survey, identify the HI centres to assist with the nomination of current HI users, past HI users and non-

users and determine the logistics for conducting focus groups and individual interviews, and draft the questionnaires/agendas to be used, for approval by the NHIA.

3. Finalise survey methodology and all survey information to be obtained and the logistics of collecting the survey information.
4. Arrange for regional focus groups and individual surveys to be conducted.
5. Conduct three focus group meetings and individual interviews in each of the 3 regions of Victoria.
6. Write up summaries of each focus group and individual interviews and discuss with NHIA.
7. Prepare a draft discussion paper for the proposed workshop and seek comment from members of 28th November workshop.
8. Finalise the workshop discussion paper and prepare the final report for the assignment and present to NHIA.

The role of the consultant will be restricted to the obtaining of survey information on the use and non-use of HI services and the preparation of a discussion paper to be used at the proposed HI industry workshop to be conducted following completion of the assignment.

LITERATURE SEARCH

A review of past reports and information pertaining to the provision of HI services was undertaken prior to the commencement of the research on HI services used by dairyfarmers. This review covered :

- Workshop to reduce Test Day hassle (NHIA 1995)
- Opportunities for HI service providers (Monash University 1995)
- HR's economic contribution to the Victorian dairy industry (ABARE 1997)

It is broadly seven years since these reports were produced and with the increase in scale of dairyfarming and advancement of technology, particularly technology associated with animal identification, and automatic measurement of milk, it is timely that research on HR be undertaken.

Described below is a brief summary of these reports to provide background to the research results obtained from this assignment.

Workshop to reduce Test Day hassle (NHIA 1995)

A two day workshop was attended by 70 industry people and the outcomes were:

- Adoption of a wider and forward thinking approach to HI services
- Develop a suitable electronic animal I/D device
- Develop an affordable in-line milk flow meter
- Introduce alternate am/pm herd recording for those who want this system
- Outsource the milk testing process

Arising from the workshop a Taskforce was formed to carry out the recommendations which broadly have been implemented through a number of R & D projects that have been completed and the R & D taken up commercially.

Opportunities for HI service providers (Monash University 1995)

The Monash University conducted qualitative research using six Focus Groups in each of the three main dairy regions of Victoria. The results reported from this research were:

- competition for delivery of HI services benefits dairyfarmers
- the delivery of HI services must satisfy farm business requirements
- the value of HI services are not evident until used by farmers
- quality payments for milk will drive demand growth for HR
- benefits of HR are hard to quantify against disadvantages experienced
- farmers that use HR are more likely to use AI than farmers who do not use HR
- farmers have different needs for HI services
- HR information needs to be applicable for decision making
- HR information needs to be presented to farmers against an industry benchmark
- Large or developing farms generally do not use HR information for culling

The Focus Groups identified the following reasons why farmers use HR:

- farmers who progeny test have to HR to select bulls
- HR is used to select bulls against cow weaknesses
- the PI is used to cull cows
- some farmers are motivated by performance numeric expression
- maintaining a history on the herd over a number of years
- selling stud cows
- prove performance to business partners

HR's economic contribution to the Victorian dairy industry (ABARE 1997)

The research study on the economics of HR resulted in the following findings:

- 63% of dairyfarmers used HR and 90% used AI to improve productivity of their herds
- 10% of dairyfarmers did not HR and did not use AI
- farms that HR have higher annual milk production, higher income and higher profit per cow and less variability within the herd than farmers who do not HR
- the industry as a whole benefits from HR activities through increased cow productivity as a result of genetic gain

Conclusions from literature search

The review of the research undertaken over the last 7 years indicated there was no specific focus on what non HI services that could be provided by HI Centres, and apart from the industry workshop conducted by NHIA in 1995, the research did not suggest any improvements to current HI services or provide qualitative evidence why farmers did not HR.

METHODOLOGY FOR SURVEY OF HI SERVICES

The first step in the assignment was a desktop literature research on the use and development of HI services.

To assess the views of dairyfarmers on HI services and potential services, a survey was then conducted of:

- current users of HI services,
- past users of HI services, and
- farmers who have never used HI services.

The survey sought dairyfarmer views on the respective current HI services (Herd Testing, Artificial Insemination, Progeny Testing, and other HI services), and sought suggestions on potential services that could be provided by HI organisations.

To obtain a representative response from users and non-users of HI services, the survey was conducted in the three main dairying regions of Victoria.

The survey in each region used the Focus Group approach to obtain the required information from current users, and individual interviews and phone interviews were conducted with non-users of HI services.

Three Focus Groups were conducted in each region for users and past users of HI services. Each Focus Group consisted of around 10 randomly selected HI service users and included some past users.

For non-users of HI services personal interviews were conducted with 2 to 3 non-users in each region. The individual interviews of non-users were conducted in person or by phone in order to eliminate any peer pressure influencing the information presented.

The NHIA approved the questionnaires and Focus Group discussion agenda to be used to obtain the required survey information. The selection of 9 Herd Improvement Centres to assist conduct the Focus Groups in the three dairying regions of Victoria was done with the assistance of the NHIA.

Each Herd Improvement Centre invited participants in the Focus Groups and hosted the Focus Group meetings arranged in their area. To encourage free discussion amongst dairyfarmers no HI Centre staff participated in the Focus Groups.

The survey results from the Focus Groups and the individual interviews were summarised and a draft Workshop Discussion Paper prepared for consideration by the NHIA for presentation to the proposed Workshop to be held following completion of this assignment.

In addition to the survey of HI services in Victoria, a survey form was drafted to provide input to the survey of HI services from States other than Victoria. A letter from NHIA with the survey form was sent to HISWA (WA), AHRS (Qld), HISCOL (SA), ABRI-Dairy Express (NSW), and TasHerd (Tas). The responses received were taken into consideration in preparing the draft Workshop Discussion Paper on HI services.

CONDUCT OF FOCUS GROUPS

The nine Focus Groups were conducted in the three main dairying regions of Victoria as follows:

Northern Victoria - Cohuna, Waaia, and Tatura

Western District – Warrnambool, Timboon and Colac

Gippsland – Maffra, Warragul and Korumburra

There were 76 participants in the Focus Groups representing 69 farms. The local HI Centre invited the participants to each Focus Group and arranged the meeting set up.

All of the participants in the Focus Groups used Artificial Insemination and most of the participants used Herd Recording.

The discussion agenda for each Focus Group is set out at Appendix B and the briefing paper forwarded to each participant is attached at Appendix C.

Following the conduct of each Focus Group a summary was prepared and forwarded to the Manager of each HI Centre that hosted a Focus Group. These summaries remain confidential to each respective HI Centre.

CONDUCT OF INDIVIDUAL INTERVIEWS OF NON HI SERVICE USERS

Each HI Centre that organised a Focus Group also provided the names and phone numbers of 2 to 3 dairyfarmers who do not Herd Record and where possible, the name of a dairyfarmer who does not use AB.

Visits to some farms were made to interview these dairyfarmers with most of the dairyfarmers being interviewed over the phone. Without exception all dairyfarmers contacted were willing to provide their views on why they do not use HI services.

To facilitate the individual interview process, a questionnaire was drafted to record the responses of dairyfarmers as to why they do not use HI services. The questionnaires were summarised to provide a collective view in the Workshop Discussion Paper.

Each dairyfarmer's response to the survey questions remains confidential to the individual dairyfarmer with the response losing identity in the summary that was prepared.

SURVEY INFORMATION FROM INTERSTATE HI ORGANISATIONS

Four State HI organisations (TasHerd, HISCOL, Dairy Express and HISWA), responded with completed questionnaires which were summarised and the information compared with the Focus Group responses.

The information provided by interstate HI organisations was similar to the Focus Group information, and confirmed the findings of the Focus Groups, with the exception of Herd Software. The software programs used included additional programs such as Dairy Champ, Eaze Dairy, On Farm, AgFeeecs, Alpro, Westfalia Plan 6, Dairy Express and Winfarm.

WORKSHOP DISCUSSION PAPER

As required under the terms of reference a Workshop Discussion Paper was prepared separate to this report. The paper is drafted in a format that can be circulated to participants in the proposed Workshop following approval by the NHIA.

The draft Workshop Discussion Paper is attached to this report and covers the following matters.

- Introduction
- Profile of participants in survey of HI services
- Current status of Herd Recording

- Improvements to Herd Recording
- Current status of Artificial Breeding
- Improvements to Artificial Breeding services
- Current status of cow identification
- Improvements to cow identification
- Current status to calf dehorning
- Improvements to calf dehorning
- Current status of HI supplies
- Improvements to HI supplies
- Status of computers, internet and herd software use
- Improvements to computers, internet and herd software
- Additional services that could be provided by HI Centres

Key observations drawn from the dairyfarmer responses that should be addressed by the proposed NHIA Workshop are:

- With factory payment systems now requiring BMCC to be under defined levels to gain a premium payment, farmers see HR as a necessary tool to control their BMCC through periodic ISCC reports to maximise milk quality payment
- Herd Testing is still perceived to be a hassle and there is a need to simplify the operation
- Automation of Herd Testing at the farm is not perceived by the vast majority to have a cost benefit at current cost levels
- The increasing number of computers on farms (75% of the Focus Group participants) is leading farmers to require data available at their fingertips to better manage the herd and there is strong interest in the development of low cost pocket computer input devices which can also provide cow information record on demand
- Whilst AB has a very high adoption rate, a key concern of many farmers is the low fertility rate achieved and there is strong support to undertake research to improve the conception rate
- Dairyfarmers use multiple methods (usually 3 to 4 methods) of calf and cow identification as there is no single method that meets all requirements including permanent attachment
- Only one third of farmers have applied the NLIS electronic ear tag although most farmers stated they intended to put the tags on calves and cows
- With the exception of two farmers there is very little use being made of the NLIS tag for integration into a computerised herd identification and management system
- There was a wide range of views for the local HI Centre to supply items other than AI and HT items. Some HI Centres had well developed supply item service and others ranged from a medium to token service
- Although the general view of Focus Groups was that HI Centres should concentrate only on the delivery of HI services, all Focus Groups said that the major challenge currently facing dairyfarmers was obtaining good quality labour for the farm including relief milkers, farm employees, and farm owner/manager relief, and a labour provision service could be provided by local HI Centres

OTHER MATTERS

Affordability of automated HT set up

In a number of Focus Groups the question of affordability was raised in relation to the newly released ELi in-line Milk Meter. The general view was that the basic ELi Milk Meter at around \$670 per cup set was considered expensive and in any case most farmers wanted a fully automated set up including the ELi meter which is near twice the cost of the basic ELi meter.

Discussions were held with the Field Representative for the ELi Milk Meter and it was apparent that there is strong farmer interest in further development of the use of the in-line meter occurring to incorporate auto cow I/D, cow drafting, auto cup removal, bale feeding control, and mastitis detection. Integration of all these requirements in a software program that included the herd data base was considered a desirable requirement.

Development of data input and readout facility

A number of Focus Groups raised the need for the farmer to have a simple portable device that could be carried in the farmer's pocket to read out individual cow details from a computer record and allow the farmer to input data about the particular cow such as detected on heat and date/time on heat, calving details, health problems, and instructions for milking operators.

The Groups that discussed this issue thought that the mobile phone would be an excellent device to use for this purpose providing it could carry or access cow details from a data base and allow the farmer to input and transmission of data to a computer data base.

Discussions on this prospect were held with the Mr Lawrence Paratz, Managing Director of Telstra Countrywide, 242 Exhibition Street, Melbourne, (phone 03 9632 2566). Mr Paratz advised that Telstra Countrywide would be most interested in participating in a Workshop on the use of Short Message Service (SMS) on mobile phones for dairyfarmers to input text data into computer data bases (currently being done in other industries), and also the development of a pocket mobile phone/computer reader/input device that uses the CDMA network (being launched by Telstra this year).

It is recommended that a session on current developments in remote communication to computer data bases be included in the proposed NHIA Workshop prior to consideration of matters associated with computer/software services to dairyfarmers.

APPRECIATION

The survey of HI services and the preparation of the Workshop Discussion Paper would not have been possible without the assistance of the HI organisations and the dairyfarmers who participated in the Focus Groups and the individual interviews. In particular the assistance of the following is appreciated :

- ❑ The HI Centres who invited farmers to the Focus Groups and provided the facilities
- ❑ The dairyfarmers who gave up several hours of their time to contribute their views in the Focus Groups
- ❑ The dairyfarmers who made themselves available for individual interviews
- ❑ TasHerd and HISWA for returning the questionnaires
- ❑ The NHIA for assisting organise the Focus Groups and interstate participation

T W O'Callaghan
Primary Industry Consultant
May 2002

Terms of Reference for Consulting Assistance

NHIA is seeking information on the use and non-use of HI services by farmers to facilitate the conduct of an industry workshop on industry development and enhanced financial viability. Accordingly it is proposed by NHIA that a survey be conducted by an independent consultant of HI service users and non-users, to provide for the proposed workshop, a broad understanding of :

- a) why farmers use HI services,
- b) why farmers do not use HI services particularly Herd Recording, and
- c) what other services farmers believe might be suitably provided/made available by HI Service organisations

To this end the Consultant is required to :

1. Undertake a literature research of past reports on the use and development of HI services.
2. Prepare a preliminary draft of the methodology to be used to conduct the survey, identify the HI centres to assist with the nomination of current HI users, past HI users and non-users and determine the logistics for conducting focus groups and individual interviews, and draft the questionnaires/agendas to be used, for approval by the NHIA.
3. Finalise survey methodology and all survey information to be obtained and the logistics of collecting the survey information.
4. Arrange for regional focus groups and individual surveys to be conducted.
5. Conduct three focus group meetings and individual interviews in each of the 3 regions.
6. Write up summaries of each focus group and individual interviews and discuss with NHIA.
7. Prepare a draft discussion paper for the proposed workshop and seek comment from members of 28th November workshop.
8. Finalise the workshop discussion paper and prepare the final report for the assignment and present to NHIA.

The role of the consultant will be restricted to the obtaining of survey information on the use and non-use of HI services and the preparation of a discussion paper to be used at the proposed HI industry workshop to be conducted following completion of the assignment.

Any further consulting assistance which may required to plan and facilitate the workshop will be subject to a separate assignment proposal.

The output of the assignment will become the property of NHIA for use in future planning of HI industry development.

**HERD IMPROVEMENT SERVICE FOCUS GROUP
DISCUSSION AGENDA**

1. INTRODUCTION

- Appreciation of participation
- Background to NHIA research
- Changing environment for HI services

2. DAIRYFARM PROFILE OF PARTICIPANTS ON HI RELATED MATTERS

- Computer used (herd information)
- Computer used (electronic transfer of information)
- Form of animal identification used
- Registration of cattle used (stud)
- AI used and if DIY
- Other HI services used

3. HERD RECORDING AND TESTING USED AND SYSTEM USED

- Monthly pm/am
- Bi monthly pm/am
- Monthly alternate pm and am
- Other

4. COMMENT ON WHY EACH HI SERVICE USED

- Herd Recording and Testing
- AI semen purchase
- Insemination service
- Progeny testing
- Cattle identification (type)
- Freeze Branding
- Calf de-horning
- Herd Software
- HI Farm Supplies (eg nitrogen)
- Other services

5. COMMENT ON POSSIBLE IMPROVEMENTS TO EXISTING HI SERVICES

- Herd Recording and Testing
- AI semen sales
- Insemination service
- Merchandise
- Other services

6. OTHER SERVICES THAT COULD BE PROVIDED BY LOCAL HI CENTRE

- Associated with HI
- Other services outside traditional HI area

7. COMMENT ON AWARENESS OF HI INDUSTRY INFRASTRUCTURE

- NHIA
- ADHIS

8. COMMENT WHY YOU THINK NON USERS DO NOT HERD RECORD

- Reasons/opinions never used
- Reasons why ceased using

BRIEF ON RESEARCH ON HERD IMPROVEMENT SERVICES

BACKGROUND

The National Herd Improvement Association (NHIA) has initiated a project to assist HI Centres expand the use of HI services, improve the services currently being delivered and identify new services that could be provided by HI Centres.

It is over 7 years since research was undertaken on why farmers do and do not use herd improvement services, and with pressure on the industry to rationalise, the advancement of new technology, and the changing needs of farmers, it is time that research on these issues be conducted again.

Local HI Centres have agreed to participate in the project which in the first instance will research the views of users of HI services through Focus/Discussion Groups. Non users of HI services will be interviewed on an individual basis to obtain their views as to why they do not use herd improvement services.

The first phase of the project is essentially gathering information on the use and non-use of HI services. The information gained from this research will be summarised and used for the second phase of the project which will be the conduct of a workshop for representatives of HI Centres later this year. The outcome of this workshop will be for the use of HI Centres to improve the services they provide, consider new services that could be provided and increase the number of dairyfarmers using the HI services.

This project has the support of the HI Centre members of NHIA, and 9 HI Centres throughout Victoria have been invited to participate in the first phase of the project.

HI CENTRE PARTICIPATION

Each HI Centre participating in the research of the use and non use of HI services is required to host a small Focus Group of up to 10 clients who are current users of HI services.

The Focus Group will meet at the HI Centre for around one and a half-hours, at a time and date to be selected.

The Focus Group will be led by former UDV Executive Director, Terry O'Callaghan, who has agreed to assist NHIA research the following matters:

- (a) why farmers use HI services,
- (b) why farmers do not use HI services particularly Herd Recording, and
- (c) what other services farmers believe might be suitably provided/made available by HI service organisations.

Each HI Centre will assist by selecting the participants for the Focus Group and inviting their attendance, and provide a venue for the Group.

Attached is an agenda that will be used for each Focus Group to help participants understand the matters to be canvassed in each Group.

In addition to the conduct of Focus Groups, a limited number of interviews will be conducted with non-users of HI services to identify the reasons why they do not herd test or use other HI services.

MAKE UP AND CONDUCT OF FOCUS GROUPS

HI Centres will be responsible for inviting dairyfarmers to participate in each Focus Group, taking into account the need to have a Group that is broadly representative of their client base.

Participants in each Focus Group will be free to submit their views on any aspect of herd improvement services, and individual views will remain confidential to the Group and will not be identified in any summary of the views expressed in a Group.

The information obtained from each Focus Group will be summarised and the summary made available to each HI Centre who hosted the Group. A master summary will be made of all 9 Focus Groups conducted in Victoria, for presentation to the workshop to be held later in the year.

Farmers are encouraged to participate in the Focus Groups to assist the Herd Improvement industry develop and implement plans for the future to improve the delivery of services and introduce new services to assist farmers.