

# Collaborate to Compete

*The Nova Scotia Beef Industry Strategy 2009-2014*

# FOREWARD

We believe in and are working hard to build a sustainable and profitable beef industry.

We believe that we need to transform the current industry and implement significant changes. This strategy outlines the changes that we need to champion - not just hope for - if this industry is to survive and flourish. Maintaining the status quo is not an option. Given the pace, magnitude and complexity of the changes happening in agri-food, protein markets and our industry, and the current state, we'll need even more skills and tools than ever before.

The leadership from Beef Industry stakeholders that has come together to drive this strategy is an example of some of the fundamental changes we need to make. We are redefining the industry's relationship with government so that we can create partnerships for short term solutions *and* long term change. We are shifting toward leadership that understands the need to work more co-operatively, with strong relationships among businesses, institutions, and governments in Nova Scotia - in fact, across the maritime region.

Every sector has to be flexible and adaptable, especially when sustained growth will most likely come from niche opportunities in new and different markets. This strategy outlines changes that will shift attention away from our industry's preoccupation with supply-side thinking (trying to find purchasers willing to take what we have to offer) to the demand-side thinking (find the best and most profitable markets for what we can produce based on our strengths) that can help us overcome weaknesses in our ability to compete regionally, nationally and internationally. We will use our understanding of market trends and opportunities to help us adapt our business, production, and marketing models and capitalize on local strengths whenever they create an advantage.

This first ever provincial strategy, with regional links, outlines the new directions we will take to develop a sustainable and profitable future for the Nova Scotia beef industry.

## The Nova Scotia Beef Industry Strategy Steering Committee

Dave Oulton, Chair of Steering Committee, and Chair of Nova Scotia Cattle Producers

Jim Bremner, Nova Scotia Cattle Producers

John Tilley, Vice Chair of Nova Scotia Cattle Producers

Greg Sheffer, Past Chair, Nova Scotia Cattle Producers

Linda MacDonald, Nova Scotia Department of Agriculture

Shelley Manning, Agriculture and Agri-Food Canada

Hema Chopra, Nova Scotia Department of Agriculture - Committee Support

## And Past Steering Committee Members

Mike Horsnell, Nova Scotia Cattle Producers

Alan Grant, Nova Scotia Department of Agriculture

## Strategy Consultant and Facilitator

Rebecca Colwell, Fourth Wave Strategy Inc.

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Collaborate to Compete – The Nova Scotia Beef Industry Strategy

# Strategy Development Process

# STRATEGY DEVELOPMENT PROCESS

The strategy development process began when the industry-government Steering Committee was struck in May 2008.

The key activities and events in the strategy development process were as follows:

May 2008	Strike the NS Beef Industry Steering Committee
<b>Phase One – Planning to Plan</b>	
May - July	Conduct key stakeholder interviews – retain Gardner Pinfold
July	Design the process – retain Fourth Wave Strategy Inc.
July	Validate the process with NSCP Board of Directors – July 11, 2008
August	1 <sup>st</sup> Stakeholder Strategy Session, Debert – August 18&19
<b>Phase Two – Strategy Development</b>	
October – February	Develop the vision, analyze strategic issues, prepare background information for stakeholders, develop survey
December	Survey to validate the draft strategy – distributed to all NSCP Members & Young Farmers Forum
February 2009	2 <sup>nd</sup> Stakeholder Strategy session, Greenwich – February 3&4
<b>Phase Three – Implementation Planning</b>	
March	Steering Committee presentations at NSCP zone meetings
March-July	Finalize the strategy goals and objectives; develop the implementation governance model; design implementation projects; prepare budget estimates
July	3 <sup>rd</sup> Stakeholder Strategy session, Greenwich – July 29
August – September	Prepare proposal package and seek funding
<b>Phase Four – Implementation</b>	
To be determined	Dissolve the NS Beef Industry Steering Committee – Initiate new NS Beef Industry Development Council

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# Vision and Strategy

## VISION AND STRATEGY

### Where do we want to be in five years time?

The strategy articulates where industry stakeholders want the industry to be in five years time. It includes an overall detailed vision, and the long term goals or results to make that vision a reality and that give us strategic direction.

### The Vision

Our vision is a positive statement of what we want to be in the future, written as if we are already there.

In five years time, our vision for the Nova Scotia beef industry is that:

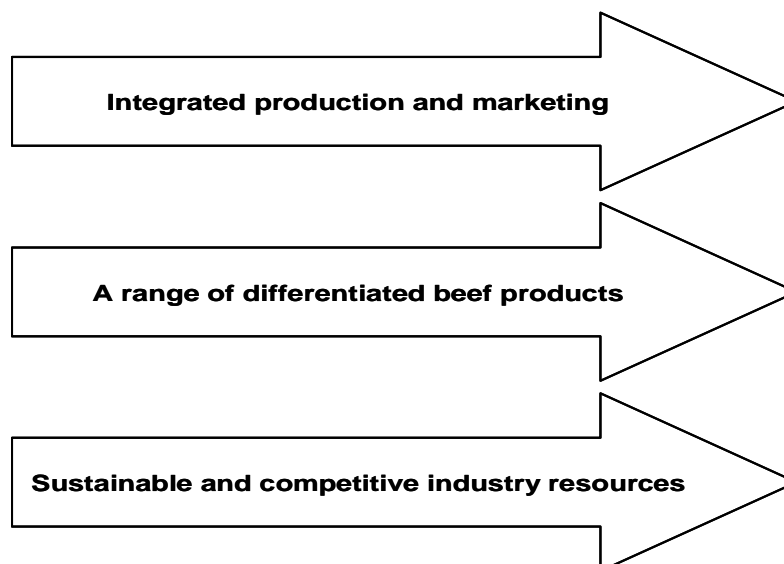
We are selling more than beef. We are selling: quality, traceability, reputation, safety, health, environmentalism, and pride in our region.

Our beef industry has resolved the uncertainty of where to send this spring's calves and last fall's feeders. We have many markets to choose from, each one built around the simple yet powerful notion that we know our customers and they trust us to produce what they want.

We have rededicated our industry to the limits and possibilities of sustainability, to the achievement of profitable collaboration in the value chain, and to the creation of business models that meet our needs - a Nova Scotian way.

### Strategic Directions

Achieving the following long term goals will help us achieve the vision of success for the Nova Scotia beef industry:



The next few pages provide an overview of each of the three strategic directions. Each overview describes what success will look like when the intent of the strategic direction is fully achieved and the most critical issues and opportunities that need to be addressed starting this year.

## Strategic Direction 1 Integrated production and marketing

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### Vision of Success

*We can expect to see the following results when this strategic direction has been fully implemented:*

The Nova Scotia beef industry will be market driven. Market-driven means we make our marketing and production decisions on the basis of information and knowledge about the market and customer needs. We have access to a fluid flow of market intelligence and know how to react more efficiently to customer demand in a manner that balances demand and supply.

Individual producers have strong marketing competencies, and are better equipped to make decisions on their farms that are consistent with market signals and trends. Producers are engaged in forums where trends are discussed and there is wide spread communication of possibilities and of the positive things being done.

Producers of high quality calves and beef are participating in a greater variety of new markets in a collaborative way. For example, one group of farmers has collaborated by establishing a local feedlot; another has formed an alliance to produce a consistent calf for a specific market opportunity. These kinds of virtual consolidation have increased economies of scale, increased profitability and helped retain independent farm ownership. Young entrepreneurs are entering the beef industry and taking advantage of good business opportunities in our rural communities.

Strong industry cooperation and the sharing of information between sectors (backgrounders, cow calf, feed lots and finishers) makes them better able to pursue market opportunities. Business alliances between producers, and producers and processors are the norm. We are realizing more from our investment in Atlantic Beef Products Inc. and its contribution to develop niche beef markets.

The industry sees consumers and customers as partners in profitability and integral to its sustainable competitiveness. Retailers help us develop our products to meet their customers' needs. We are successfully marketing to a variety of market channels; for example: we have better structured marketing of live animals and better defined products for retail and other markets.

### Issues and Opportunities

Today, we are enjoying a greater number of opportunities that enable producers to participate in the value chain.

Our access to traditional markets has been shrinking, retail markets are consolidating, and at the same time, the marketplace is becoming more differentiated. We are dependent on our federally inspected plant, Atlantic Beef Products Inc. (ABPI), to access export markets, regional markets, retail and foodservice. Traditional marketing systems for red meat are no longer orderly, and they are failing. Within this turbulence, there are significant opportunities to develop new understanding and approaches to ensure future success in our markets and market channels.

The business foundation for the industry in the future needs to be a market assessment – identifying what the market and customers want and translating that downstream through the value chain into production. We have not yet developed a system to identify and better respond to market opportunities; however, AgraPoint has recently completed some important ground work that defines production models for any market, including commodity cattle and branded beef, and the tools, production model spread sheets, are ready to fill in. This emphasizes how business

managers can profit from the greater availability of information technology (internet and computers) and decision support.

We have been using “supply-side” instead of “demand-side” thinking to resolve issues in the beef industry. For example, as a “seller” we offer what we have now for the price we can get or take. As a “marketer”, we will begin to ask what we can produce based on our strengths to the best market for the greatest profits in a sustainable way. When we use demand-side thinking we are willing and able to change the breeds we select, the characteristics of our herd, and products we produce.

Given current and future economic and market trends, many of Nova Scotia’s beef farms do not have viable business models or structures. More of the global industry is focused on cost of production (CoP), and more data is becoming available to show that CoP is lower in other places, particularly for grain-raised production models. The average scale of our farms (number of animals, land base) is too small to sustainably compete especially in commodity markets. Consolidation of farms and increasing production unit size, perhaps virtually or through actual consolidation, is essential for a Nova Scotia beef industry.

Some of our industry members are skeptical and may be reluctant to experiment with new and different approaches. Seeing actual industry collaboration and business alliances in action can help increase awareness and develop a shared belief that it can work for “me”. We can learn about how effective alliances work from other places and other industries. We also need to build a more collaborative culture. In the past, sectors have not been collaborative, but rather competitive and distrustful. We need to repair and strengthen business relationships across the value chain.

Succession planning is high on the personal agenda of the majority of farmers, as is the desire to resolve business challenges and regain some profitability before they transition their business to new ownership or management. We will need to recruit and develop new managers to fill the coming vacancies and to sustain and grow the industry.

### Our priority results over the next 2-5 years

Goals	Objectives
1 Strong and profitable export capable value chains	1 Create a strong relationship between ABPI and NS (and NB and PEI) producers that are interested in participating in a value chain  2 Develop integrated feedlot capacity to support the value chains
2 Modernized regional production and marketing systems for live cattle	1 Encourage producers' adoption of collaborative means to lower total cost of production per unit, or improve quality  2 Increase access to buyers globally through an enhanced live cattle marketing process

### Indicators that will show us we are on track

- Number of alliances pursuing market opportunities
- Accessibility of market information
- Amount of reinvestment / new investment

### Key Stakeholders required to produce these results

- Atlantic Beef Products Inc.
- Producers
- AgraPoint
- Researchers
- Processors
- Production development, partners in applied research
- Market Research and Development
- Marketing

### Existing research and development, initiatives or investment related to these objectives

- Production models developed by AgraPoint
- Value Chain research from the George Morris Centre
- National Value Chain Roundtables (e.g. Canadian Pork Value Chain Strategic Framework)
- Live cattle marketing study in New Brunswick

### Key concepts:

- Value chain: A high-level model of how businesses receive raw materials as input, add value to the raw materials through various processes, and sell finished products to customers. Profitability and partnership are key attributes at each link of the value chain
- Market driven: When managers, organizations, or sectors make decisions on the basis of information and knowledge about the market and customer needs.

## Strategic Direction 2 A range of differentiated beef products

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### Vision of success

*We can expect to see the following results when this strategic direction has been fully implemented:*

A greater percentage of our Nova Scotia beef industry's activity is oriented towards producing a diverse range of value added beef products. We have strong product research and development capacity that is finding new uses for beef and delivering successful product innovations through a variety of distribution channels.

We have a strong market research program that helps us develop beef products that meet the specific attributes that consumers and customers demand. This research capacity has also helped increase our industry productivity (reduced waste) by finding new markets for every part of our cattle, including trim.

We have the capacity to seek out new markets that line up with our comparative advantage, grass forages. The grass fed attribute is perceived, valued, and important in these target markets. Producers are conscientiously following feed regimes (e.g. summer pastures with grass, fall high quality forage with supplements, etc.) to maintain this advantage.

Producers are consistently selling a specified quality of beef which their customers want. They follow insights from "outside – in" measures that help them continue to profitably meet customer demand with perfect orders. We are investing in brand development for selected markets, and carefully manage the brand(s) and quality to ensure it delivers on its promise. Success would mean that all Nova Scotian beef is inspected, and it would also mean we have producers in Nova Scotia, New Brunswick and Prince Edward Island pooling their resources to create dependable capacity to fill specialty beef markets.

### Key issues & opportunities

As a high cost producer with little or no market power in the commodity market, producers of beef face an uncertain future. For example, the number of marketing options for the sale of commodity fed beef, commodity feeders and commodity breeding stock is declining. Nonetheless, there is real opportunity for the Nova Scotia beef industry to break the current trends and enjoy a profitable and sustainable future by shifting into more promising products in the increasingly differentiated beef markets. Value added products could include organic, natural, certified-hormone free, Kobe, and grass fed beef; and veal.

We have an opportunity to differentiate Nova Scotia beef and build on the present positive Nova Scotian brand. Consumer research should dictate the positioning and brand(s). In the consumers' minds, branded beef could be a lot of things, and many factors or attributes come into play. Through a rigorous approach we will determine how to respond to emerging consumer trends such health consciousness (beef is good source of Omega 3 and 6), increasing price/value sensitivity, and an increasing value attributed to locally produced and sourced food. At this time, we don't know if "maritime" is *the* brand to choose; however, any brand should capitalize on our natural strengths.

A brand also needs to be protected. We need rigor to protect the quality of the product, and inspection of all Nova Scotia beef products is essential. The fact that some beef sold in the Nova Scotia, New Brunswick and PEI markets is still not inspected is a critical provincial and regional threat.

A lot of our industry research in the past has been directed at reducing cost of production, rather than identifying market or marketing opportunities. Our current capacity to access and evaluate beef product markets is weak. We need to develop this capacity, and invest in ways to speed up test marketing. Converting market information into an actual new product will take leadership and perseverance, especially in this industry where more sophisticated marketing and sales have not been required in the past. We can build on production research conducted by the Maritime Beef Testing Society regarding the types of feed and environmental conditions needed to produce the cuts of meat consumers now demand.

We can only be successful in niche markets if we can secure adequate volume of product that meets certain specifications. With our smaller scale of farm operations, cooperation across farm businesses to produce similar products may be challenging on a large scale. We need to overcome any sense of competition and put our focus on partnership and collaboration instead.

Our food safety system and traceability advantages have attracted an immediate opportunity to sell beef into an offshore market. This definable market opportunity can be scalable, and is dependent on regional input.

### Our priority results over the next 2-5 years

Goals	Objectives
1 A portfolio of branded quality, healthy and profitable beef products	1 Identify the desired products and product specifications
	2 Develop the initial brand to test the market
2 A consistent quality and sufficient supply of cattle that meets identified brands	1 Improve overall production performance - develop and implement industry standards and best practices throughout the NS cattle production chain
3 Producers have products (genetics to grown cattle) that profitably address market opportunities	1 Explore and develop markets and market channels for opportunities to reposition and expand (including live cattle and direct marketers)
	2 Deploy resources to allow individual producers to evaluate their business, product and market opportunities

### Indicators that will show us we are on track

- Number of different beef products that are sold
- Number of producers participating in specialty or niche product chains
- Brand strength in target market
- Number of partnerships / alliances / value chains

### Key stakeholders required to produce these results

- Producers
- Input suppliers
- Extension – business development and market development
- Processors
- Food Service
- Retail
- Value chain expert
- Regulatory environment
- Commercialization/business structure expertise
- Global vision marketer
- Maritime Beef Council / regional representation
- Public policy representative

### Existing research and development, initiatives or investment related to these objectives

- Work at ABPI to develop beef products
- Maritime Beef Council efforts
- Opportunity scan
- Nielson Data
- CCGP retail opportunities identified
- Identified Nova Scotia Restaurant Association food service opportunities

### Key concepts:

- Brand: A product or service to which human beings attach a bundle of tangible (functional product and service characteristics) and intangible (emotional and/or symbolic) meanings that add value. A brand has one strategic purpose and that is to differentiate itself from competitors.

## Strategic Direction 3 Sustainable and competitive industry resources

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### Vision of success

*We can expect to see the following results when this strategic direction has been fully implemented:*

The Nova Scotia beef herd has the genetic foundation and consistently performs to meet profitable market needs.

Our industry is keeping our land in production and managing land and water resources in a sustainable way. We have an excellent forage production system and new feed regimes that make a difference on the bottom line of each business. We support land use policies that sustains these critical natural resources. Our farms are attractive and environmentally friendly. Since stewardship sometimes goes beyond the direct benefit to a business, we have found ways to balance societal benefits and private costs.

Well established strategic infrastructure, from ‘bricks and mortar’ to research expertise, allows us to capture opportunities. Nova Scotia Cattle Producers (NSCP) is properly funded and has the human resource capacity to lead and manage industry development. Co-operation between maritime producers, our three maritime provinces and the federal government has made our regional beef-processing facility, ABPI, sustainable. We have identified and filled missing roles to help our industry be more competitive, such as; the need for more marketing management expertise, centralized sales capacity, beef specialist, and/or beef marketing specialist, etc.

Industry has the ability to collectively support and commit to strategic resources for growth and development. We identify resources that are needed to support best practices in everything from production to marketing, and monitor our progress towards desired results as outlined in this strategic plan and business cases for the resources.

### Issues & Opportunities

With this strategy in place, we have an opportunity to leverage resources from a variety of other sources to develop the beef industry. However, we don’t have sufficient capacity in our industry organization to do business cases and demonstrate the rigor required for public/private investment. Our ability to focus on longer term strategic development is sometimes diverted by short-term pressures. We want to minimize the shock from the transition from industry decline back into growth. We acknowledge that there are no “one size fits all” solutions, and NSCP needs greater capacity to provide support through the process.

Young people are not entering the beef industry. Young people that are interested in agriculture are gravitating to the supply managed commodities where the economic prospects appear to be better.

One of the biggest productivity and performance issues in the industry today is the genetic hodgepodge of cattle on which we base our industry. We need to continue to invest in research to learn about which cattle perform better genetically, and to identify what lines we should be looking at based on processor’s product needs and consumer trends. We need to provide information to help cow-calf producers adopt the type of genetics that will perform best in our conditions, and provide what the market is looking for. Producers report they do not receive feedback from feed-lot operators on the performance of individual animals. In spite of empirical evidence that genetics needs attention, farmers are not investing in changing their herds.

Farmers are starting to value environmental stewardship in new ways. The public doesn't yet broadly perceive that farmers can produce desired environmental benefits. Our provincial stock of productive farm land is at risk due to current economic pressures and encroachment.

This direction will ensure that we have well established strategic infrastructure from 'bricks and mortar', to research expertise, to crops and cattle. Industry must now decide both the strategic and future roles of ABPI, the Nappan Research Station, and the Maritime Beef Test Station.

### Our priority results over the next 2-5 years

Goals	Objectives
1 Enhanced industry capacity to collaborate, coordinate, communicate, provincially and beyond	1 Enhance NSCP's capacity to champion and participate in industry development (by industry we mean the whole supply and market chain, genetics to consumer; business and government, public and private) 2 Create a formal multi-stakeholder alliance to lead and manage Nova Scotia Beef Industry Strategy development
2 A comprehensive research, human resources & extension programme that creates synergies and focus	1 Develop a research and extension strategy for beef 2 Determine infrastructure supports for research (including Nappan and MBTS) 3 Determine research and extension human resource needs to support the strategy
3 An eco-committed production system	1 Certification program for the required brand attributes e.g. hormone free, humane treatment certifications, feed regimes, Enviro Farm plans (EFP) 2 Implement sustainable and competitive forage production models 3 Develop brand compliant farm management processes

## Indicators that will show us we are on track

- Evidence of broad adoption of environmental / sustainable farm practices
- Degree of self-sufficiency for export across the value chain within the Maritimes
- Commercialization of beef industry research and development (innovation)
- Performance of the genetics of our herds

## Key Stakeholders required to produce these results

- Government – municipal, provincial, federal
- Owners of environmental and physical infrastructure – Processors, Test Station, Atlantic Stockyards etc.
- Funding programs/lenders
- Stock breeders
- ABPI
- Research/Nappan and Maritime Beef Test Station – feed regimes
- NSAC
- AgraPoint

## Existing research and development, initiatives or investment related to these objectives

- Forage productivity research at NSAC and elsewhere
- Enviro Farm Plans program
- Feasibility study re: shared services for red meat associations

## Key concepts:

An industry or business that is **sustainably competitive**<sup>1</sup> will:

- look to niche opportunities in new markets and new products for growth
- invest in research, development and training that builds on local solutions
- strive to meet (or exceed) international standards, finding niche opportunities and capitalizing on local strengths where this creates an advantage (think locally, act globally)
- work towards making products recyclable or biodegradable
- enhance and renew the capital resources, especially human and natural, needed to remain competitive
- look to alliances and partnerships to capitalize on aggregate skills and resources
- invest in productivity
- transform new or under-used capacity or waste into higher-value products through innovation
- conserve energy and be aware of climate change impacts
- understand the importance of design for creating globally competitive products, and increasing productivity
- build flexibility, adaptability and responsiveness into systems
- gather information about emerging trends
- take a long term view.

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<sup>1</sup> Excerpt from: Learning From The Future: Nova Scotia and the Circular Society, June 2005, as discussion paper towards the development of the Sustainable Prosperity strategy.

# Accountability for Implementation

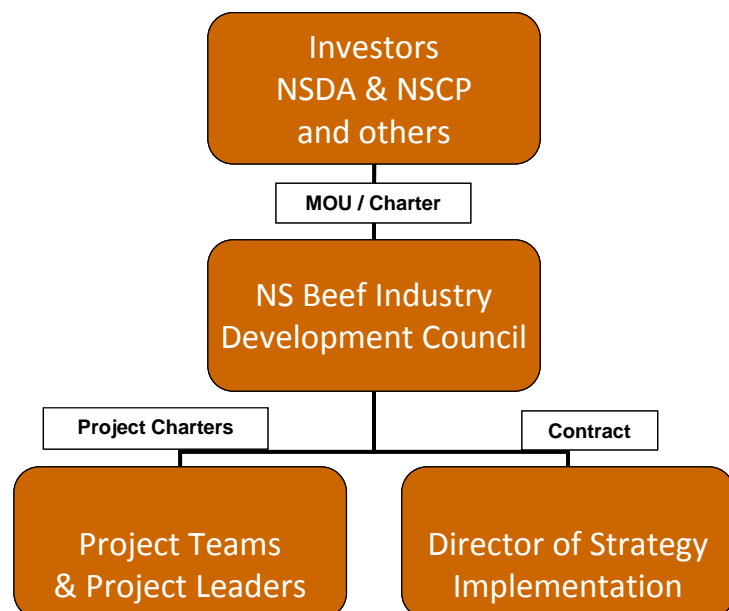
# ACCOUNTABILITY FOR IMPLEMENTATION

## Overview of the organizational structure required to implement the NS Beef Industry Strategy

The recommended process and structure for implementation represents best practice industry and multi-stakeholder strategy implementation. Each element of the organizational structure is described below.

- The **investors'** partnership will begin between **NSCP and NSDA, and potentially other investors**, to oversee the entire process and provide investment to the multi-stakeholder implementation team. The founding investors are NSCP and NSDA, and others will join over time.
- A **strong multi-stakeholder Industry Development Council** operating within a Memorandum of Understanding with the investors (a high level document), will manage the strategy implementation and projects, liaise with other key stakeholders and allocate and manage resources to ensure the process is a success. The role of the Council is described in more detail on the next page.
- **Project Teams** will be accountable for implementing projects and for reporting on the projects' results and outputs. We will begin five projects in 2009 – the first year of the strategy. Each project will have a project charter, approved by the Council. Project teams will be comprised of volunteers from across industry and government.
- A **Director of Strategy Implementation** will ensure the detailed strategy development; implementation, tracking and reporting proceed in an effective manner. This senior leader will set clear mandates for project participants, develop and use structured formats, tools and a process for timely reporting and documentation.
- Implementation will include a number of **accessible meetings, events, and opportunities for real input** to build buy-in, consensus, and create a shared vision in the stakeholder communities that make up the NS Beef Industry, including its Maritime links.

The relationship between each of these elements is shown in this organizational chart.

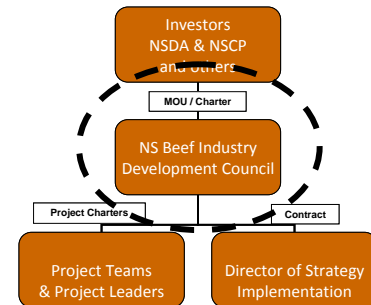


# The Nova Scotia Beef Industry Development Council

This new group will be the governance body accountable for implementing, monitoring and evaluating the Nova Scotia Beef Industry Strategy on behalf of the investors NSCP and NSDA, and potentially other investors. This Council will contribute to the strategy's goal of creating enhanced industry capacity to collaborate, coordinate, and communicate, provincially and beyond.

Its purpose is to:

- Find, allocate and manage resources to ensure the process proceeds and be accountable to all financial investors, or funders – NSCP & NSDA, and others
- Produce regular status reports on the progress of the strategy – annual report
- Find and set up appropriate leadership for each project: project leader and other members
- Approve project charters and authorize the project
- Hire and manage a Director of Strategy Implementation
- Communicate with each project team on a regular basis to ensure they are on track
- Help remove obstacles to implementation
- Develop key stakeholder awareness of and commitment to the strategy
- Evaluate progress, and initiate new projects as the previous set are completed



## **Council Membership**

Each member will be accountable to represent the needs and interests of **all** stakeholders across the value chain. This is not a voting body; decisions will be reached by consensus. Each participant will be empowered to make decisions without having to consult with any other outside group for permission to act.

Members will be selected so as to create a strong complement of multidisciplinary *skills* – finance, production, marketing, research, etc. The composition of the Council should reflect the diversity of *different perspectives* from business experience across the beef value chain, for example: experience working in Marketing, Research, Extension, Primary Producers, Feedlots, Processing, Retail, Food Service / Restaurants etc. Council will have a maximum of eight members. Efforts should be made to secure a minimum of two members with strong experience in primary beef production.

The Council will develop and follow a key stakeholder consultation process when reviewing progress, and determining new projects or setting new priorities. Other key stakeholders may be consulted on an as needed basis.

## **Role of Chair (or designate)**

Conduct the meetings of the NS Beef Industry Development Council (NSBIDC)

Set agenda, provide structure for the meeting

Call and cancel meetings as per the quorum  
Ensure the key discussions/decisions of the meeting are recorded (e.g. minutes, synopsis)  
Ensure good quality participation  
“monitor the pulse”, motivate participants, renew commitment as required  
Be a spokesperson for the strategy

### ***Council Member Accountability***

Be mutually accountable for the success of this process  
Represent the needs and interests of **all** stakeholders across the value chain  
Participate in all meetings  
Prepare in advance of meetings  
Confirm attendance no later than three days in advance  
Be on time  
Be open  
As an owner of the process, communicate constructively about this process  
Support the decisions of the group - no negative talk about group decisions outside the room

### ***Meeting Quorum***

If we do not meet the quorum, the meeting will be postponed  
We will use a consensus approach – all members are required to confirm consensus decisions  
At the discretion of the chair, a meeting may proceed with a minimum of \_\_\_\_ (to be determined)  
The decision to cancel a meeting will be made no later than three days before

### ***Meeting ground rules***

No hierarchy in room  
All speak freely as individuals  
Very participative  
Value alternative viewpoint/different perspectives  
Respect the need to move on  
Respectful and professional demeanor

### ***Revision to Terms of Reference***

- The NSBIDC will review the terms of reference and, if required, make adjustments once each year

### ***Number of meetings:***

There will be more effort at the beginning of the process, and the pace for the Council will slow down as the Project Teams get underway. We anticipate three in person start-up meetings. Quarterly meetings will also be held in person, with an option for more frequent one hour teleconference meetings. Meetings will be held in the NSCP Boardroom in Truro.

### ***Key events for the Council:***

secure legal status / registration

hire the Director of Strategy Implementation

approve project charters

meet with Project Team Leaders (in conjunction with the Director of Strategy Implementation) to assess progress on a periodic basis (quarterly or semi-annual)

present annual report to investors

refresh the “strategy” and set new priority initiatives for next 12 months

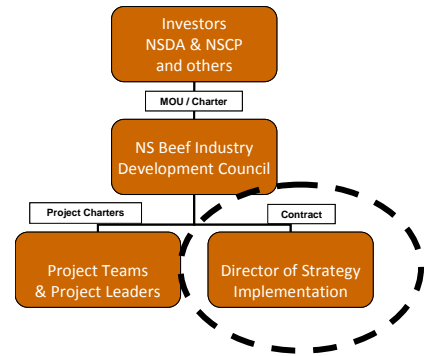
## Director of Strategy Implementation

This position reports to the Chair of the NSBIDC.

The Director's role is to:

- design and coordinate the project implementation process, in consultation with the NSBIDC and others, to obtain results in a timely manner
- provide expert advice in the organizational design of the projects, and help get project teams underway
- coordinate documentation and information management for all project elements
- build and maintain a comprehensive database of stakeholders and organizations
- plan and execute internal and external communications to raise awareness in the beef industry and the public (website, email campaigns, periodic reports, media etc.)
- hire external assistance as required – research, IT, communications advice etc.
- plan, organize and facilitate consensus-building working meetings
- synthesize the ideas, strategies and suggestions that arise through the process for validation by stakeholders
- plan and implement an evaluation process for projects and the overall strategy
- maintain a project schedule

A job description for this role follows.



### ***Job Description – Director of Strategy Implementation***

Reporting to the Chair of the NSBIDC, the Director of Strategy Implementation will be responsible for managing the implementation of the NS Beef Industry Strategy.

The Director of Strategy Implementation will provide leadership to the strategy implementation process through several key results areas:

- Project management and budgeting
- Networking and coordination
- Project planning and development with volunteer project teams
- Communications and Promotion

An estimated percentage of time allocated to each key result area follows below.

25%	Project Management	<p>Plan and organize implementation projects and project teams</p> <p>General project administration (templates, report structure and process, timelines etc.) monitor and report on progress of all projects against the implementation plan and industry strategy</p> <p>Scan for and assess factors that may influence current projects and new opportunities</p> <p>Financial budgeting and control of the implementation projects, and the overall budget for strategy implementation with NSBIDC</p> <p>Communicate project progress to the NSBIDC and facilitating the resolution of project issues</p>
20%	Networking and Coordination	<p>Interact with a wide scope and variety of industry and government stakeholders, within Nova Scotia and beyond.</p> <p>Develop, maintain and enhance networks of key businesses, agencies and groups that may provide industry growth opportunities.</p> <p>Coordinate implementation efforts with government departments (provincial, federal, international); related strategy initiatives (Red Meat, Maritime Beef Council); and associations, on programs and initiatives that support the aims of the NS Beef Industry Strategy.</p>
35%	Project Planning and Development with volunteer Project Teams	<p>Provide support to project teams to help them form, develop project charters and work through a range of challenges as they achieve the project's objectives.</p> <p>This may include start up planning; assisting with the identification and supply of financial, outside services and stakeholder support; and addressing change management issues.</p>
15%	Communications and Promotion	<p>Communicate the vision and strategic intent to various audiences, including beef producers and expand support for the vision</p> <p>Promote progress and opportunities for involvement in strategy implementation</p> <p>Carry out the communications plan and coordinate necessary communications support as required (strategy brand, media – web, print, etc.)</p>
5%	Occasional	Perform other duties as assigned.

### ***Knowledge/Special Skills Required***

A Bachelor's Degree plus 10 years progressive management experience, or a Masters plus 6 years experience is required.

A familiarity with agriculture and related sectors (value added, processing, distribution, retailing). Experience with marketing, business management or business development and project management are required.

Strong presentation/writing and analytical skills are essential, including an ability to communicate and motivate via written media. The candidate must be adept in use of MS Office 2000 or later, particularly Word and Excel, Internet and email. Familiarity with managing web sites an asset.

### ***Specific Judgment and Initiative Required***

There is a definite requirement to exercise independent judgment and initiative in generating and planning work.

The incumbent is required to represent the NS Beef Industry Strategy Implementation Council when organizing and managing initiatives, networking, and providing support to project teams. As such, the incumbent must possess a high degree of tact and professional decorum.

The incumbent must also be equally effective working in teams and with volunteers. Internal staff management is not part of the job; however people-management skills and experience are essential.

### ***Physical, Mental and Visual Demands***

This position demands considerable travel, including nights and weekends, both outside the Province and within. A home office is acceptable, and some office presence at NSCP is recommended to facilitate networking with staff.

This position is exposed to normal hazards associated with visits to agricultural, processing and related operations, and hazards associated with travel. The Director must be able to work under pressure and accommodate fast turnaround when required.

### ***Compensation***

Annual compensation contract estimated at \$70-85K with no benefits. The term will be for 3 years, and will be renewable. This is a performance contract, reviewed by the Chair of the Council each 2 months for 1 year, and twice per year thereafter.

## Project Teams

The Project Teams will carry out the bulk of the implementation work. They are accountable for implementing projects and for reporting on the projects' results and outputs.

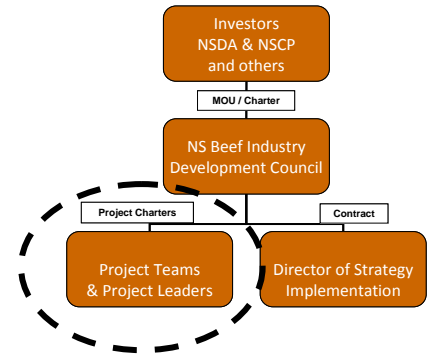
Project teams will be comprised of volunteers from across industry and government.

Each Project Team's role is to:

- design the project and prepare a project charter for approval by the Council. A project charter is a project management tool that states what the project is about, and includes a work plan with a start date, stop date and other important milestones.
- carry out the project activities, outlined in the charter, to achieve the intended results
- report on their activities and progress
- maintain alignment with the overall strategic plan
- maintain communications with key audiences
- monitor their own team performance and make adjustments to their working process as required

Each project team will have a designated volunteer project leader, who will act as a spokesperson and representative of the project team.

The next section provides an overview of the initial priority projects.



# Projects

## PROJECTS

This section describes the purpose of, and an overview of the proposed work in each project.

The projects were designed to contribute the desired goals and objectives, and to ensure we are building the right capacity to help transform the industry and create a new growth curve. We considered the feasibility of this collaborative approach given the reliance on volunteer leadership. Each project was also designed so that it would produce a measurable impact.

The projects were based on input received since the project initiated in August 2008, from three stakeholder sessions, surveys, NSCP zone meetings and other submissions. The projects were validated by a group of industry stakeholders, including seed stock providers, producers, processors, marketers, retailers, public policy managers and researchers, from Nova Scotia, New Brunswick and Prince Edward Island on July 29, 2009.

Five projects will be initiated in 2009 – the first year of the strategy. Some of these projects will span multiple fiscal years.

Project 1 Value Chain and Profitable Products

Project 2 Modernize Primary Production – made up of sub-projects 2A, 2B and 2C

Project 3 Promote Producers' Market Opportunities

Project 4 Set Research and Extension Priorities

Project 5 Strengthen NSCP (internal to NSCP)

Each project will have a designated Project Team Leader responsible to carry out the project plan and to ensure the right industry members are involved.

The outline of each project includes its name, a statement of purpose and an outline of what the work will include. Each project team will review this information in their start-up meeting and prepare a more comprehensive project breakdown in a project charter, for approval by the NSBIDC.

## Project Outlines

Project	Name	Purpose	Work of the Project Team will include:
1	Value Chain and Profitable Products	To define best practices so we can promote value chains as a way of doing business, and start one or more value chain businesses with a specific set of businesses	<p>Select examples of actual value chains</p> <p>Consult different value chains (relevant to NS beef) and the different segments in each chain to gain more understanding</p> <p>Create extension program to educate industry about value chains</p> <p>Consider the outputs of other projects: incorporate the results (e.g. market opportunities) as timing permits</p> <p>Investigative travel (or bring experts here)</p> <p>Develop a prospectus based on existing examples</p>
2A	Modernize Primary Production Part A) Producer Collaboration	By March 31, 2010 or earlier: to have groups of producers sharing equipment, assets, resources, information and using their combined scale to reduce costs, increase value and pursue new opportunities	<p>Look at how to use and improve the primary production cost of production planning tool so that it can show the benefits of scale through collaboration and encourage collaboration</p> <p>Consider existing collaboration models and best practices we can learn from</p> <p>Develop an extension program that promotes forms of collaboration (e.g. farm clubs) and implement the program to get participation as soon as possible</p> <p>Investigate and develop change methodologies to increase participation, identify how to get people to participate</p> <p>Determine how to tap into existing resources / programs</p> <p>Develop zone by zone pilots to create visibility</p>

Project	Name	Purpose	Work of the Project Team will include:
2B	Modernize Primary Production Part B) Forage Production and other best practices	<p>To determine the preferred “green<sup>2</sup>” forage production system(s) in this province (including water quality) and encourage adoption of these systems</p> <ul style="list-style-type: none"> <li>• get ready to respond to a differentiated product for a new value chain and possible certification</li> <li>• define and implement best practices in forage production</li> </ul> <p>To increase adoption of best practices by a critical mass of producers so we have more consistently fed cattle</p>	<p>Identify appropriate green forage production systems for Nova Scotia (we have dedicated researchers / experts in this province)</p> <p>Identify best practices for each system for Nova Scotia</p> <p>Determine the forage production systems we need for certification (hormone / organics etc.)</p> <p>Identify obstacles to adoption (e.g.. low Ph, high cost) and recommend options</p> <p>Demonstrate best practices more broadly</p> <p>Develop consistency across a critical mass of producers</p>

<sup>2</sup> By “green forage production system” we mean an eco-friendly, sustainable forage production system.

Project	Name	Purpose	Work of the Project Team will include:
2C	Modernize Primary Production Part C) Feedlot Best Practices	To use feedlot pilots to demonstrate their effectiveness and prepare for value chains. To explore the benefits of retained ownership and obtain data through transparent costs for the feed packages that are used.	<p>Defining how feedlot will track, monitor cattle; identify IT requirements including readers, panels</p> <p>Design the evaluation framework, describe what we will measure and assess, e.g. efficiency given the size of feedlot</p> <p>Define the refined feed regime “feed package”</p> <p>Set up contract with interested parties</p> <p>Develop a pilot to demonstrate best practices and obtain cost data</p> <p>Develop a method to share results – communications process</p> <p>Etc.</p> <p>(Note that one of the zone pilots in Project 2A can also be a feedlot)</p>
3	Promote producers’ market opportunities	<p>To be conducting a business education program targeted to NSCP members</p> <p>To have a report with opportunity and economic analysis of differentiated local beef products</p>	<p>Identify and assess (economic) market / consumer / business opportunities – gather stats, do analysis</p> <p>Communicate business opportunities targeted to key participants.</p> <p>Develop a business education program including tools targeted to NSCP members</p>

Project	Name	Purpose	Work of the Project Team will include:
4	Set Research and Extension Priorities	<p>To identify the specific research and extension initiatives and programs that should be implemented / continued in 2010 and beyond to support the beef industry strategy</p> <p>To begin work on several pilot projects that demonstrate best practice in research and address key strategic priority areas</p>	<p>Identify the research and extension that is required to successfully implement this strategy (for each direction, goal and objective)</p> <p>Assess what research and extension is currently underway &amp; by whom (produce an inventory)</p> <p>Assess the fit between what we need and what is already happening, and identify gaps and how to fill them</p> <p>Identify roles – who do we need to do what – for all players in the research community (public and private sector)</p> <p>Involve the research community – the influencers – to understand the identified priorities and develop a commitment to that direction</p> <p>Determine what processes we need for accountability and sharing (e.g. research council that meets twice a year)</p>
5	Strengthen NSCP	<p>By September 2009</p> <p>to identify the appropriate business and organizational model for NSCP to adopt, i.e. the plan for sustainability</p> <p>By March 31, 2010 or earlier:</p> <p>to implement all the changes</p>	<p>Review and update the current strategic plan for NSCP</p> <p>Confirm the mission</p> <p>Evaluate functional requirements (communications, finance, hr, admin, service delivery) and prioritise needs (basic needs vs. wants) or (distinguish between must haves and nice to haves)</p> <p>Identify alternatives for organizational design (may involve looking at other examples)</p> <p>Develop the desired business and organizational model</p>

# Appendix

# APPENDIX

## Frequently Asked Questions

### **What is the Collaborate to Compete strategy?**

**Collaborate to Compete** is a document that outlines a vision, strategic directions and goals for the Nova Scotia Beef Industry. It will guide projects and initiatives designed to reposition the industry for a more profitable and sustainable future by

- building on current successes
- enhancing the industry's competitive advantages and
- exploring new growth opportunities with partners along the market chain

The **Collaborate to Compete** strategy was drafted by a steering committee of cattle producers and government representatives with input from hundreds of industry stakeholders.

### **Why do we need a strategy?**

Cattle producers have told the NS Cattle Producers (NSCP) Association and provincial government that they are struggling. They want change. This was the starting point of a review of the entire industry from producer to consumer. What that review showed was a need to reposition the entire industry in order to be more profitable and sustainable. The strategy provides a plan to guide members of the industry to success.

### **What will the strategy do for cattle producers?**

The **Collaborate to Compete** strategy provides a framework for producers to work together over time on initiatives that will positively impact their future.

### **Does the strategy have something for every industry stakeholder?**

**Collaborate to Compete** is not focused on any one part of the industry; rather, it strengthens the entire industry and encourages more partnerships, alliances and collaboration to compete in both commodity and differentiated beef markets.

The strategy addresses some of the needs that all producers have in common: a stronger more sustainable industry association, improved infrastructure, better market information etc. However, it is unlikely to meet all the needs of all producers. Different farms have different needs. Individual producers will decide which strategic direction and projects they wish to participate in.

## **What impact will a new provincial government have on the Collaborate to Compete strategy?**

It is difficult to know what impact the new provincial government will have on the implementation phase of the **Collaborate to Compete** strategy. However, given the input and support the steering committee, and subsequently the strategy, have received from producers and other industry stakeholders over the last year, we are confident the Collaborate to Compete strategy will be favourably received by Minister MacDonell.

## **What is involved in the implementation/action phase?**

Through the three to five year implementation phase, the focus will be on defining and implementing projects that support achievement of the three **Collaborate to Compete** strategic directions:

- Integrated production and marketing
- A range of differentiated beef products
- Sustainable and competitive industry resources

The projects and initiatives will be designed and implemented so that they help to reposition the industry for a more profitable and sustainable future. Proposed projects for the first year of implementation include

1. Value chain and profitable products
2. Modernize primary production
3. Promote producers' market opportunities
4. Strengthen the Nova Scotia Cattle Producers
5. Set research and extension priorities

The immediate next steps include assembling an implementation council to oversee successful implementation of the strategy, soliciting final input from producers and other industry stakeholders on the five proposed projects, pulling together project teams, defining specific actions and a budget for each project, and soliciting funding for the projects.

## **Who will implement the strategy? What is the role of the Nova Scotia Cattle Producers and the provincial government?**

Just as defining the Collaborate to Compete strategy was a collaborative effort, with input from stakeholders across the beef industry, collaboration and involvement of producers and other stakeholders from across the industry are key to the implementation phase. Industry stakeholders will act as members of the implementation council, whose role is to oversee successful implementation of the strategy, project leads, and project teams. To support the implementation council and project teams, a full-time Director of Strategy Implementation will be hired on a three-year contract basis.

The Nova Scotia Cattle Producers and the provincial government have overall responsibility for successful implementation of the strategy. The implementation council will report on its progress to the NSCP and provincial government at least twice each year.

### **When will action start on the projects? What is the timeline?**

Action on the first year projects (as defined above) has begun in the form of naming project leads, and defining specific actions to be undertaken and budgets. Project teams will be pulled together through the summer. One of the most important next steps is to solicit funding for each of the five first year projects from government and industry. Securing funding is key to further action on the projects.

The five strategic projects are termed “first year projects” because they will all be initiated in the first year of implementation (pending funding). Some of the five projects may span more than three years while others may be complete within a year; they may also spawn other projects that reach into year five of implementation.

### **Will there be more than five strategic projects?**

The proposed projects slated to begin in the first year of implementation are not intended to be the only projects initiated to meet the goals outlined in the **Collaborate to Compete** strategy. It is likely that some will spawn other projects and that, when the implementation council reviews progress on the strategy implementation with input from industry stakeholders, further projects will be added.

### **How can I get involved in implementing the strategy?**

Getting involved in implementing the strategy is as simple as a phone call or e-mail to one of the steering committee members. Industry stakeholders are invited to get involved in the project(s) that is of most interest to you.

Steering Committee members:

Dave Oulton, 798-4923, [dianddaveoulton@eastlink.ca](mailto:dianddaveoulton@eastlink.ca)

Linda MacDonald, 424-4560, [macdonld@gov.ns.ca](mailto:macdonld@gov.ns.ca)

John Tilley, 384-2961, [johntilley@northnovacable.ca](mailto:johntilley@northnovacable.ca)

Greg Sheffer, 420-8717, [greg\\_sheffer@scotiamcleod.com](mailto:greg_sheffer@scotiamcleod.com)

Jim Bremner, [jim.bremner@ns.sympatico.ca](mailto:jim.bremner@ns.sympatico.ca)

Shelley Manning, 896-0098, [Shelley.manning@agr.gc.ca](mailto:Shelley.manning@agr.gc.ca)

### **When can I expect to see results of the strategy?**

Each step will provide results, some large and some small, that will add up to the vision for the industry. The first set of projects will produce more modernized approaches in primary production (reducing costs and increasing quality through collaboration, gaining business information to assess feedlot opportunities, and a consistent feed regime based on best practices); a stronger industry association; a research plan and direction for research to support the strategy; and education and information about real market opportunities.

### **Where will the money come from to implement the strategy?**

Once project leads and teams are in place and specific actions and a budget for each of the five first year projects have been finalized, the steering committee will solicit funding from government and industry.

### **How can I stay informed of the strategy implementation?**

Several communication tools will be used to keep industry stakeholders informed of the strategy implementation. Through the same tools, industry stakeholders will have the ability to ask questions and provide comments on the strategy implementation. The tools include:

- Collaborate to Compete website
- Twice yearly progress updates mailed to all producers and other industry stakeholders
- Updates at NSCP zone meetings and annual general meeting
- Updates from the Director of Strategy Implementation and Project Team Leaders.