

Halls Gap Village Masterplan

Background Report

North Grampians Shire
March 2015



Independent insight.



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TABLE OF CONTENTS

1	INTRODUCTION	1
1.1	Background	1
1.2	Purpose of the report	1
2	HALLS GAP CONTEXT	2
2.1	Regional context	2
2.2	Halls Gap Village Precincts	3
3	DEMOGRAPHIC AND ECONOMIC CONTEXT	4
3.1	Population and settlement	4
4	MARKET ANALYSIS	8
4.1	Regional tourism market profile	8
4.2	SWOT Analysis – Halls Gap	13
4.3	Investment opportunities	15
5	PLANNING CONTEXT	16
5.1	Planning framework	16
5.2	Key Local Government Planning Objectives	17
5.3	North Grampians Shire Local Planning Policy Framework and MSS Review (October 2014)	18
5.4	Grampians Region Foundation Villages Project	19
5.5	Ararat Stawell Halls Gap Triangle Project 2012	21
5.6	Wimmera Southern Mallee Regional Strategic Plan (2010)	23
6	GOVERNANCE AND IMPLEMENTATION	25

LIST OF FIGURES

FIGURE 1 AGE DISTRIBUTION 2006 AND 2011	6
FIGURE 2 MAP OF THE GRAMPIANS TOURISM REGION	8
FIGURE 3 VISITATION BENCHMARKS (GROWTH 2008 – 2013)	9
FIGURE 4 LIFESTYLE LEADERS ASSESSMENT FRAMEWORK	10
FIGURE 5 TARGET MARKET SEGMENT SUMMARY	11
FIGURE 6 CHARACTERISTICS OF THE CURRENT AND TARGETED VISITOR MARKETS	12
FIGURE 7 REGIONAL SETTLEMENT PLANNING PRINCIPLES	20
FIGURE 8 TRIANGLE PROJECT – STUDY AREA AND CONTEXT	22
FIGURE 9 TRIANGLE PROJECT – HALLS GAP PROPOSED ZONING CHANGES	23

LIST OF TABLES

TABLE 1 POPULATION AND AGE, 2011	5
TABLE 2 HALLS GAP SSC DWELLING TYPE, STRUCTURE AND TENURE (2011)	7
TABLE 3 ACTIVITIES UNDERTAKEN (DOMESTIC OVERNIGHT VISITORS)	12
TABLE 4 INVESTMENT OPPORTUNITIES FOR HALLS GAP	13
TABLE 5 HALLS GAP TOURISM MARKET INVESTMENT – SWOT ANALYSIS	14

1 INTRODUCTION

MVS Architects and SGS Economics and Planning have been engaged by the Northern Grampians Shire Council to prepare the *Masterplan for Future Commercial Investment and Public Land Development in Halls Gap* (the Masterplan).

1.1 Background

Council has identified the frequency of natural disasters in Halls Gap over the past decade as placing pressure on businesses in Halls Gap to the extent that they are focused on survival rather than exploring development opportunities.

In order for Halls Gap to remain competitive as a tourist destination, new products need to be introduced and reinvestment in existing accommodation, retail, dining and recreation products encouraged.

1.2 Purpose of the report

This report presents background research and analysis that has informed the preparation of the *Masterplan for Future Commercial Investment and Public Land Development in Halls Gap*.

Chapter 2 describes the position of Halls Gap in the broader region and the character of the 'precincts' of Halls Gap

Chapter 3 contains demographic and economic analysis including population profile, dwelling supply, structure and demand for residential land.

Chapter 4 provide a tourism market analysis that includes a regional tourism profile, and identification of investment opportunities and barriers to tourism in Halls Gap.

Chapter 5 summarises the current planning controls and policy.

The final chapter provides a discussion of an innovative governance and implementation framework to enable the range of projects proposed in the Masterplan, which fall under the bailiwick of a range of public and private sector organisations, to be successfully implemented.

2 HALLS GAP CONTEXT

2.1 Regional context

Halls Gap sits in the heart of the Grampians region, a major tourist destination famous for its stunning natural and cultural assets. Halls Gap enjoys direct access to the 167,000 hectare Grampians National Park, the fourth largest national park in Victoria. The Park holds more than 80 percent of Victoria's indigenous rock art sites and is integral to the dreaming of the descendants of Jardwadjali and Djab Wurrung people, who maintain connection to the park, and whose history and culture, is celebrated in the Halls Gap Brambuk Aboriginal Cultural Centre.

Over the past 25 years development at Halls Gap has been guided by a series of planning and community engagement exercises, beginning with the Halls Gap Profile Report of 1989, through to the 2001 Urban Design Framework. The latest amendment to the planning scheme, however, was in 2000, 15 years ago.

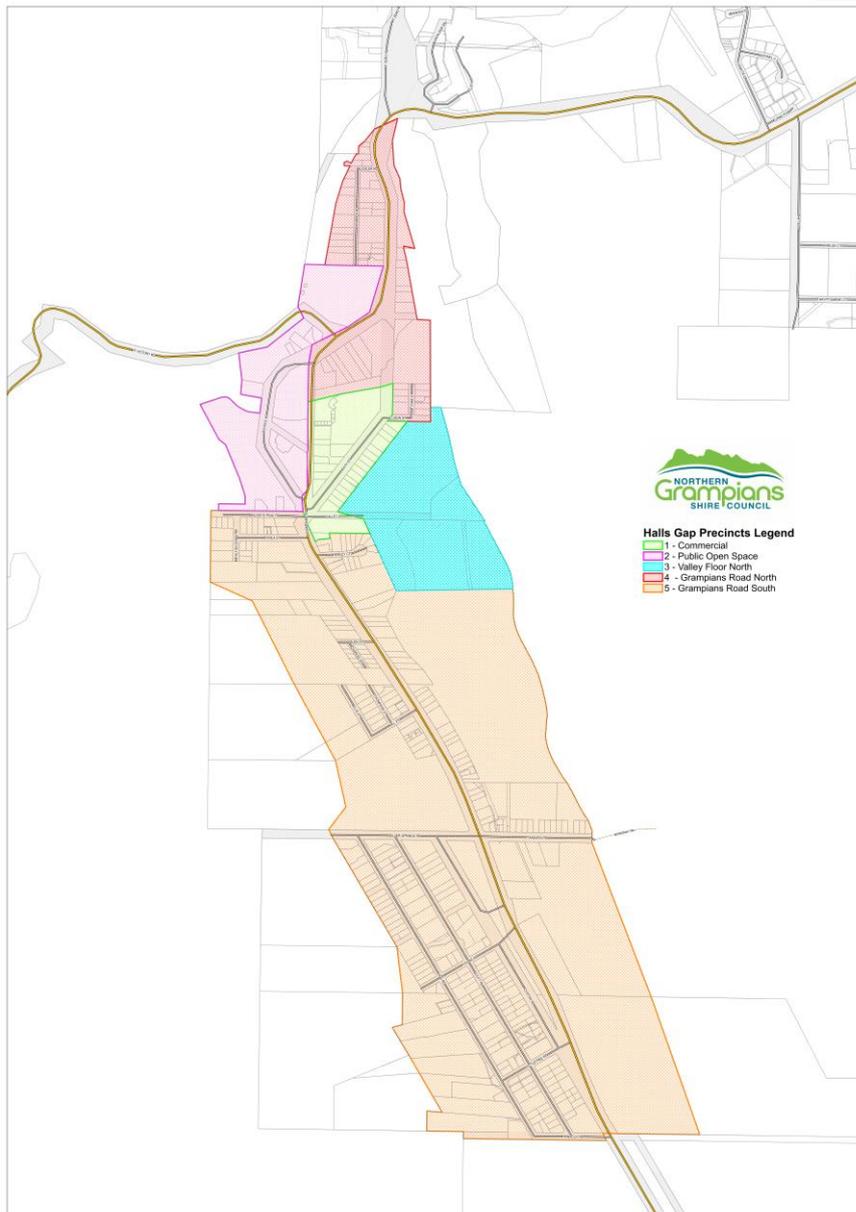
During this time Halls Gap has faced many challenges, including natural disasters of bushfires and floods, as well as the impact of broader economic and social trends of the 21st century: declining rural population growth, the rise of the internet and social media, global economic instability since the financial crisis of 2008/2009, and a new generation of visitors looking for an experience different from that of the past.

Over this period there has also been increased awareness of the environmental values of the area, and the threat to these from development. This has resulted in a series of State-government level planning reforms, placing restrictions on local development and requiring new approaches to achieving planning approval.

The ability to achieve a consolidated and lively village centre has been limited by a lack of development in the majority of main street frontages, held by a single land owner. This has had a significant and detrimental effect on the amenity of the town, affecting local confidence and visitor perception. With the recent leasing of the General Store, plans underway for the redevelopment of one of the main street sites and the opening of the new Halls Gap Community and Tourism Hub, there is great opportunity for a revitalisation of Halls Gap village. It is hoped that additional investment opportunities will flow from these developments.

2.2 Halls Gap Village Precincts

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3 DEMOGRAPHIC AND ECONOMIC CONTEXT

3.1 Population and settlement

Demographic trends

Halls Gap is a small rural town at the southern edge of the North Grampians Shire, approximately 252km from Melbourne. Its small population (613) and slow annual growth rate belie the nature of the town as a major tourist destination – during the peak of the tourist season the population can swell to up to 10,000, making use of the ample accommodation facilities in the area.

In the 2011 Census the population of Halls Gap was 613, made up of 48.9% female and 51.1% male. The average age is 48, 11 years above the Australian average.

The vast majority of Halls Gaps permanent residents were born in Australia (83%). The other top countries of birth in the 2011 census were England (4.7%), New Zealand (1.5%), Germany (1.3%), Fiji (0.5%) and Czech Republic (0.5%). English is the first language for 93.3 percent of the population with small percentages of the population speaking Polish (0.5%), Dutch (0.5%), German (0.5%), Arabic (0.5%), and Czech (0.5%) as their first language. Over a third of Halls Gap residents reported no religion in the 2011 Census, with 15.2 percent Anglican, 12.6 percent Catholic, 10.3 percent Uniting Church and 4.6 percent Lutheran.

Employment rates in Halls Gap are high with 56.8 percent of residents employed full time, 34.7 percent employed on a part time basis and an unemployment rate of only 2.1 percent. The main occupations of Halls Gap residents are:

- Managers (30.4%)
- Professionals (16.8%)
- Labourers (12.1%)
- Community and Personal Service Workers (11.2%)
- Technicians and Trades Workers (9.9%)
- Sales Workers (6.5%)
- Clerical and Administrative Workers (5.6%)
- Machinery Operators and Drivers (5.3%).

The median individual income is \$539.00 per week and the median household income is \$920.00 per week.

Halls Gap has a high rate of home ownership, with 44.3 percent of homes fully owned, 21.3 percent in the process of being purchased by home loan mortgage. 31.6 percent of homes are rented. The median rent in Halls Gap is \$151 per week and the median mortgage repayment is \$1083 per month.

At a regional level, the following trends can be observed¹:

- The population is older than average with fewer infants and more elderly people compared to the rest of regional Victoria and Australia
- The area contains a high proportion of households comprising ‘couples without children’
- Very high proportions of the rural population have Australian citizenship and are Australian born
- There are high employment and property ownership rates
- The main occupations in the area are managers, professionals, labourers and technicians and trades workers
- The main industries of employment in the area are:
 - sheep, beef cattle and grain farming
 - hospitals
 - education (including school, adult and community education)
 - beverage manufacturing
 - parks and gardens operations
 - local government administration
 - agriculture and fishing support services
 - agricultural product wholesaling and timber and hardware goods wholesaling.

Age profile, trends and implications for housing

Comparing Halls Gap to neighbouring townships of Dunkeld and Stawell, shows Halls Gap has a higher percentage of working age people than these nearby towns. Halls Gap also has the lowest percentage of people aged 65 and over, indicating a larger workforce.

TABLE 1 POPULATION AND AGE, 2011

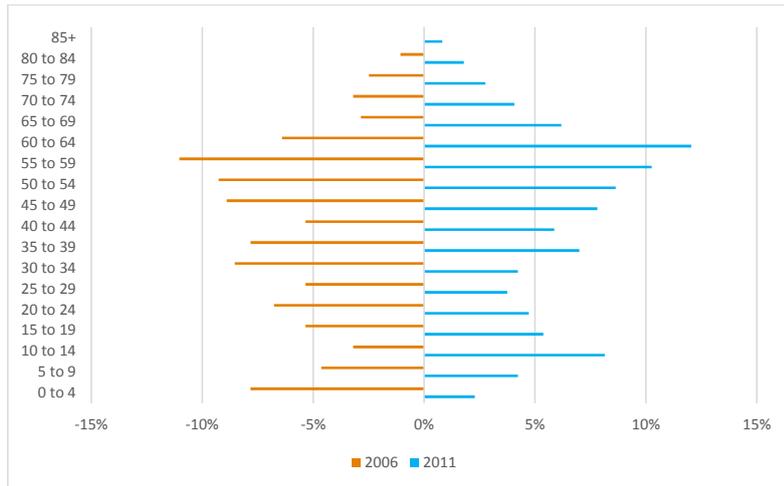
Area	Ages 0-15		Ages 15-64		Ages 65+		Total	
	No.	%	No.	%	No.	%	No.	%
Halls Gap	90	15%	428	70%	96	16%	614	100%
Dunkeld	126	17%	478	63%	149	20%	753	100%
Stawell	1103	18%	3760	61%	1287	21%	6150	100%

Source: ABS 2011 place of residence data

¹ as identified in the Triangle Project Report (2012)

Figure 1 shows the distribution of ages in five year groups for Halls Gap in 2006 and 2011. It shows a slight increase of the working age population in the last five years and a significant increase in the 60- 64 age group between 2006 and 2011.

FIGURE 1 AGE DISTRIBUTION 2006 AND 2011



Source: ABS 2006 to 2011 place of residence data

At a regional level, the Triangle review (2012) reiterates the Victoria in Future (2012) projections, which state population in this area is expected to slowly fall over the next twenty years. However, in the short term this will not result in an oversupply of housing, as household sizes are falling. It is also expected that additional dwellings will be required to supply the holiday home market for non-permanent residents.

In overall trends, the Triangle Review notes that:

Changes to the profile of the permanent population, including ageing, higher levels of disability, and smaller household sizes will also influence the housing requirements of the permanent population. Older people may be expected to require smaller, lower maintenance houses that are in close proximity to transport and services. The majority of housing that meets these requirements is located within main townships, rather than in the rural areas which are the focus of this report. (p.37)

This finding has implications for future residential housing supply in Halls Gap, with an expected future increase in demand for smaller, lower maintenance housing, in close proximity to shops and services.

Dwelling supply, structure and demand for residential land

The population of Halls Gap fluctuates considerably throughout the year due to tourism flows, and accordingly the town has a large number of unoccupied dwellings – between 42% and 59% compared to 9% in Stawell (see Table 2).

Anecdotally, this has caused a housing shortage for people wishing to rent longer term in Halls Gap as it is more lucrative to keep residences vacant for the majority of the year and take advantage of the holiday rental market. Popular holiday home-letting website Stayz shows 114 dwellings for rent in Halls Gap. Even taking into account some of these listings being for dedicated bed and breakfasts or hostels, this still represents a large portion of dwellings not available for long term rental.

This is supported by the local real estate listings, which show only two dwellings available for conventional rent in Halls Gap in November 2014². However, there are currently 83 dwellings listed for sale in Halls Gap, including a number of house and land packages such as the Royston Rd development in Halls Gap where eight dwellings are planned. The average dwelling price in Halls Gap is approximately \$280,000 (homesales.com). While real estate websites record the median weekly rental as \$286, census data suggests the true rate is significantly lower, at \$151. Median mortgage repayments are \$1083.

The majority of dwellings are separate houses (92.8%), followed by flats (2.4%) with the remainder (4.8%) recorded as "other dwellings". In the period between the 2011 census and present, a town house development has been completed for seven townhouses.

With an average household size of 2.3 people, these figures indicate that total supply of housing in Halls Gap is more than adequate, at least for house buyers. However, there may be cause to investigate the source of the high vacancy rate, and ensure that there is adequate rental supply for the worker population, and those wishing to 'trial' living in Halls Gap.

The Triangle Review (2012) forecasted that there was adequate supply of residential land in the area to serve future growth, with a total of 24 hectares of land required for residential development between 2005 and 2036 across the entire study area.

The North Grampians Rural Living Strategy (2005) notes that growth in the population of Halls Gap has slowed considerably in recent years, which may be due to a lack of available housing stock and an aging population.

TABLE 2 DWELLING TYPE, STRUCTURE AND TENURE IN HALLS GAP (2011)

	Halls Gap	%	Victoria	%	Australia	%
DWELLING TYPE						
Occupied private dwellings	250	40.6	1,944,690	88.7	7,760,320	89.3
Unoccupied private dwellings	366	59.4	246,742	11.3	934,470	10.7
DWELLING STRUCTURE - Occupied private dwellings						
Separate house	233	92.8	1,495,970	76.9	5,864,574	75.6
Semi-detached, row or terrace house, townhouse etc	0	0.0	185,737	9.6	765,980	9.9
Flat, unit or apartment	6	2.4	250,493	12.9	1,056,237	13.6
Other dwelling	12	4.8	11,692	0.6	66,666	0.9
TENURE						
Owned outright	112	44.3	665,416	34.2	2,488,149	32.1
Owned with a mortgage	54	21.3	697,533	35.9	2,709,433	34.9
Rented	80	31.6	515,586	26.5	2,297,458	29.6
Other tenure type	4	1.6	14,619	0.8	70,069	0.9
Tenure type not stated	3	1.2	51,535	2.7	195,213	2.5

Source: Census 2011

² Based on searches of realestate.com.au

4 MARKET ANALYSIS

4.1 Regional tourism market profile

In 2012 the Grampians Tourism Region³ attracted approximately 1.6 million visitors⁴. Tourism was estimated to contribute \$946 million in Gross Regional Product or 22.2 percent of the local economy⁵. Tourism is, unsurprisingly, critical to the economy of the region.

Significant regional planning has been undertaken over the past five years to bring coherence to the planning of the region, and ensure that activity and investment is undertaken in a coordinated way. A key document, the *Grampians Tourism Strategic Plan 2012 – 2016* sets out a three year strategic plan for tourism development in the Region. It is used to guide the actions of Grampians Tourism, and other key stakeholders.

FIGURE 2 MAP OF THE GRAMPAINS TOURISM REGION



Source: Grampians Tourism Destination Plan and Investment Roadmap (2014).

Tourist profile

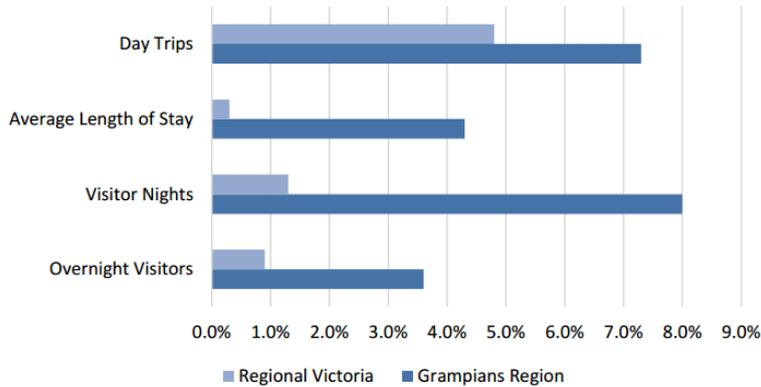
The Grampians Region's domestic visitation is characterised by a high proportion of interstate visitors (25%), with moderately lower proportions of international (9%), and intrastate (66%) visitors compared to Regional Victoria as a whole (Figure 3). Since 2008, Grampians domestic visitation has increased at above regional Victorian benchmarks.

³ The Grampians Tourism Region includes the Shires of Horsham, Northern Grampians, Southern Grampians, Ararat and Pyrenees.

⁴ Grampians Tourism (2013) *Travel to the Grampians Year Ended March 2013*. Grampians Tourism, Halls Gap.

⁵ Deloitte Access Economics (2013) *Victorian Regional Tourism Satellite Accounts 2011-12*, Tourism Victoria

FIGURE 3 VISITATION BENCHMARKS (GROWTH 2008 – 2013)



Source: Grampians Tourism Destination Plan and Investment Roadmap (2014).

Lifestyle leaders

The tourism markets of Halls Gap and the wider Grampians Region were profiled for the development of the *Grampians Tourism Destination Plan and Investment Roadmap* (March 2014). This roadmap outlines projects and priorities to grow the potential of the Grampians Region as a whole.

Significant work has been undertaken to identify the core target markets of the Grampians Regions in order that further investment might be targeted towards them, such that the region can work in concert.

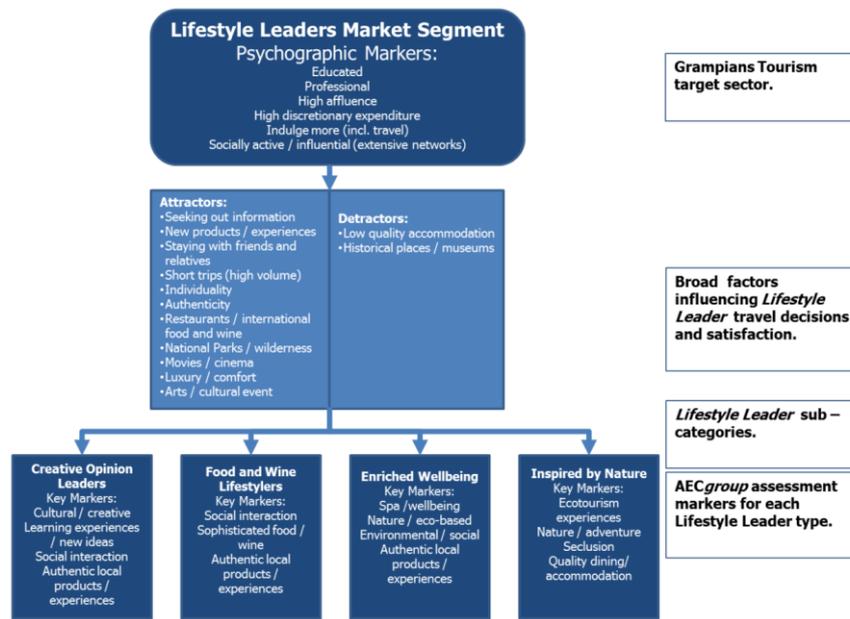
The AEC Group was commissioned to undertake this work, in the *Grampians Tourist Region Product and Experiences Gap Analysis*. Target market segments relevant to the Grampians Experiences and Product Gap Analysis are defined in terms of their psychographic (Tourism Victoria), geographic and activity-based features. It was determined that Grampians tourism region should be most focused on attracting the **Lifestyle Leaders psychographic** (as defined by Tourism Victoria), especially the Inspired by Nature sub-type.

The value of this segment for tourism stems from typical characteristics of high travel rates, high expenditures, willingness to disperse and try new things and influence over choices made by other traveller segments (AEC Group 2014). Research by Tourism Victoria into the Lifestyle Leader psychographic has revealed four key types of Lifestyle Leader of relevance to the Grampians tourism market:

- Creative Opinion Leaders
- Food & Wine Lifestylers
- Enriched Wellbeing
- Inspired by Nature

AEC Group noted that the four segments derive from the same psychographic make-up and are not mutually exclusive. However, the segments do provide a more targeted estimation of the tourism interests within the Lifestyle Leaders psychographic. The Lifestyle Leaders Assessment Framework is reproduced in Figure 5.

FIGURE 4 LIFESTYLE LEADERS ASSESSMENT FRAMEWORK



Source: Tourism Victoria, AEC Group (2014)

A target market analysis was undertaken to understand the current status of the Grampians in terms of serving the interests of this target market, and core objectives for the Destination Plan. Figure 5 shows a snapshot of the implications of this psychographic analysis in terms of the objectives that need to be pursued in the Destination Plan:

FIGURE 5 TARGET MARKET SEGMENT SUMMARY

Market Segment	Current Status	Source	Core Objectives for Destination Plan
Psychographic			
<i>Lifestyle Leaders:</i> Creative Opinion Leaders	<ul style="list-style-type: none"> The Grampians is attractive to this market in terms of individuality and authenticity The Grampians is likely weak for this market in terms of providing risks, new experiences and new ideas 	AECgroup	<ul style="list-style-type: none"> Priority target market Maintain current strengths and develop additional layers to suit
<i>Lifestyle Leaders:</i> Food & Wine Lifestylers	<ul style="list-style-type: none"> Potential strong sub-psychographic for the Grampians Strong regional competition for this segment from regions closer to Melbourne Food and wine product is still immature and generally not meeting more discerning and varied expectations of visitors 	SED Consulting (2010), AECgroup	<ul style="list-style-type: none"> Priority existing market Maintain current strengths and develop additional layers to suit
<i>Lifestyle Leaders:</i> Enriched Wellbeing	<ul style="list-style-type: none"> Likely to enjoy some niche product in the region Strong regional competition for this segment from regions closer to Melbourne (e.g. Daylesford) 	AECgroup	<ul style="list-style-type: none"> Secondary target market Develop greater diversity of product and experiences to suit
<i>Lifestyle Leaders:</i> Inspired by Nature	<ul style="list-style-type: none"> Assumed the strongest sub-psychographic for the Grampians 	AECgroup	<ul style="list-style-type: none"> Priority existing market Maintain current strengths and continue to develop and innovate products to stay relevant
International – Experience Seeker	<ul style="list-style-type: none"> Core international market Not growing however performing well relative to benchmarks 	AECgroup	<ul style="list-style-type: none"> Priority target market Maintain current strengths and develop additional layers to suit

Source: AEC Group, 2014.

Key implications from this analysis for the Masterplan in Halls Gap include:

- Investment in opportunity areas to align with priorities for the Lifestyle Leader tourist market
- An understanding that tourist visitation to the area is driven through nature-based and outdoors adventures, followed by food, wine, and heritage related product.
- Key target markets like new information, New products / experiences, Staying with friends and relatives, Short trips (high volume), Individuality, Authenticity, Restaurants / International Food and Wine, National Parks / Wilderness, Movies / Cinema, Luxury / Comfort, Arts / Cultural Events
- They do not like: poor quality accommodation, historical attractions, passive products
- Key challenges for the region were:
 - Poor accommodation standards and presentation of towns
 - Maintaining iconic “hero” status of nature attractions with target markets
 - Filling investment gaps in opportunity areas (e.g. farm and wine, water and rural culture)
 - Improving interaction between Halls Gap and the rest of the Grampians Tourism Region in a way that enhances dispersal and the overall tourism offering

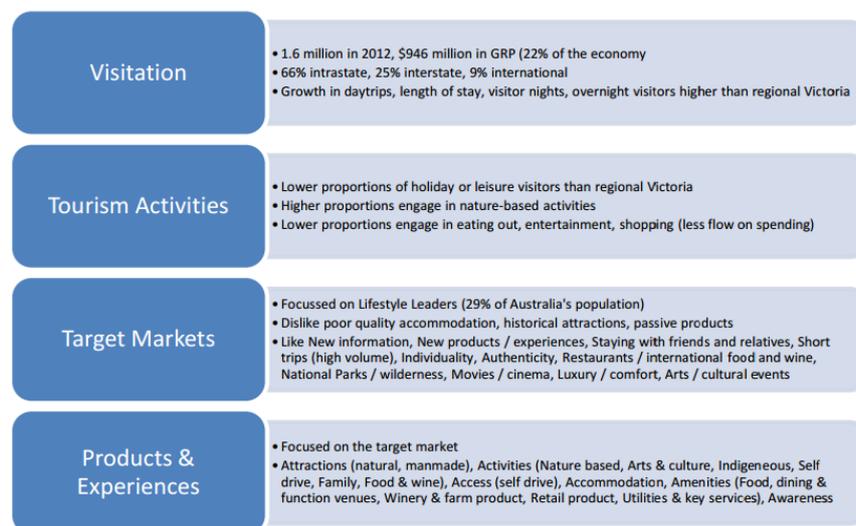
Analysis of activities undertaken by overnight visitors confirms that visitors to the region, aside from eating and visiting friends, are typically enjoying the natural attractions of the area. However, this data also confirms that the provision of good quality, attractive food, dining, bar and retail opportunities is an important way to capture visitor spend, and to attract additional visitors to the town. Currently, the Grampians Region receives below benchmark levels of flow-on spending activities such as: Eat out at restaurants, Pubs clubs discos etc., Go shopping (pleasure) (AEC Group 2014).

TABLE 3 ACTIVITIES UNDERTAKEN (DOMESTIC OVERNIGHT VISITORS)

Activity	Grampians (%)	Regional Victoria (%)
Eat out at restaurants	43	50
Visit friends and relatives	39	45
General Sight seeing	26	28
Bushwalking or rainforest walks	23	14
Visit national parks or rainforest walks	19	11
Pubs, Clubs, discos, etc	15	19
Shopping (pleasure)	11	20
Picnics and BBQs	8	9
Other outdoor activities (a)	6	4
Daytrip to another place	5	6

Source: Note: (a) e.g. horse riding, climbing, bungee jumping, four wheel driving.
 Source: Tourism Victoria (2012) Grampians Market Profile Year Ending December 2012. Tourism Victoria, Melbourne

FIGURE 6 CHARACTERISTICS OF THE CURRENT AND TARGETED VISITOR MARKETS



Source: AEC Group, 2014

Investment opportunities for Halls Gap

A series of investment opportunities were identified in the Roadmap, broken down into regional priorities, significant opportunities, and destination specific and localised opportunities. A number of these opportunities are directly related to Halls Gap, and are summarised in the table below.

While the regional investments such as the Grampians Peak Trail and the Region Digital Project will undoubtedly influence Halls Gap, at the precinct level it was noted that there are a number of opportunities areas that are important, but difficult to influence, including natural areas public use facilities and services improvements, dining and local produce retailing developments, farm and winery tourism developments, regional arts and culture facilities, information centres, local self-guided tours and trails, community amenity infrastructure, accommodation developments and enhancements in the regional centres and local events.

TABLE 4 INVESTMENT OPPORTUNITIES FOR HALLS GAP

Regional Priority Opportunities	Significant Opportunities	Destination Specific and localised opportunities
Grampians Peak Trail	Nature-based and Eco-Accommodation	Key enabling infrastructure:
Grampians Region Digital Project	Grampians Region Village and Produce Regions Project	Digital infrastructure, local touring roads improvements, public transport improvements, utilities.
Outdoor Adventure Recreation Destination	Pomonal / Lake Fyans / Halls Gap East Development Zone	Other Opportunities:
Grampians Region Foundation Village Project	Grampians Region Events Strategy	Natural areas public use facilities and services improvements, dining and local produce retailing developments, farm and winery tourism developments, regional arts and culture facilities, information centres, local self-guided tours and trails, community amenity infrastructure, accommodation developments and enhancements in the regional centres, local events.
Grampians Ring Road	Wildlife Art Museum of Australia (Pomonal)	
Indigenous Interactive Education Product (including Halls Gap (Brambuk), Budj Bim and Maggolee (Horsham)).		

Source: Grampians Destination Plan, 2014. (AEC Group, 2014)

This project falls within the larger priority opportunity area of revitalising Halls Gap and Dunkeld to incorporate elements aimed at key visitor markets, as part of the Grampians Region Foundation Village Project.

Key barriers to increasing tourism flows in Halls Gap

A number of barriers to enticing further visitation to Halls Gap were identified in the Destination Plan and Road Map. These include:

- The Grampians region is pigeon-holed as purely a ‘walking /hiking active nature’ holiday. People are largely unaware of the broader regional offer and its relative merits
- Lack of reputation for food and wine offer. This has become an integral part of a consumers’ regional/rural holiday expectation and a proxy for sophistication/quality. Whether or not consumers choose to partake is less important than the regions’ reputation for wineries, restaurants, cafes, local markets, events and festivals. In some ways Food and Wine becomes a ‘marker’ for destination sophistication/quality and shifts it up the desirability spectrum
- Perceived distance from Melbourne; relatively ‘basic’ standard of accommodation (lack of 5 star facilities), relatively poor amenities/conveniences, limited food and wine choices and a sheer lack of understanding about the breadth and depth of the regions’ offering

The Roadmap identified a pressing need to ‘improve the basics’ (AEC Group 2014, p3). This includes the knowledge of the services and amenities available as well as improving their quality and offer.

In the longer term there is a need to develop the food and wine product of the region and further develop the indoor and outdoor experiences including the iconic attractions / experiences unique to the area. Individuality, authenticity, good food and wine, and opportunities to enjoy luxury and comfort whilst retaining the natural values of the place are key considerations in developing the Masterplan, and identifying investment opportunities. According to the Roadmap, Halls Gap fails to demonstrate a regional culture through its dining or retail offerings. Accommodation and dining that is of a quality to complement other experiences in the region is a key gap (AEC Group 2014, p. 8).

4.2 SWOT Analysis – Halls Gap

Set out below is a SWOT analysis of the potential economic drivers for Halls Gap, building on previous reports, as well as investigation into current online perceptions of Halls Gap, and feedback from community stakeholders.

TABLE 5 HALLS GAP TOURISM MARKET INVESTMENT – SWOT ANALYSIS

Strengths	Weaknesses
<ul style="list-style-type: none"> - Rich in natural beauty and nature-based tourist experience. - Key attractions in the Halls Gap area are rated highly on online visitor portals such as trip advisor. Key attractions all receive scores of 4.5 to 5 out of 5, including (in ranked order) the Pinnacle Walk, Grampians Adventure Gold and MOCO Art Gallery; Halls Gap Zoo, Venture (Grampians Fitness), the Brambuk National Park and Cultural Centre; the Gap Vineyard, the Grampians Horse Riding Centre, Grampians Mountain Adventure Company, , Grampians Personalised Tours and Adventures; Absolute Outdoors; Grampians Healing Hands Massage Therapy; Grampians Grape Escape; Ros McArthur Art Studio - Civic pride: Welcoming and proud community, evident in roads, buildings, footpath, information, signage. - Nature/ active / walking holidays are considered by families as must do experiences 	<ul style="list-style-type: none"> - Halls Gap General Store. Online reviews reports the general store being overpriced, with poor service and a lack of competition. Visitors are disappointed with the quality of the offering and feel trapped into purchasing if they have not purchased elsewhere. This is a risk area for Halls Gap, given the high likelihood that other visitors will read these reviews before coming to Halls Gap and therefore avoid shopping in (and contributing to the local economy) of the town. - Halls Gap fails to demonstrate a regional culture through its dining or retail offerings. Accommodation and dining that is of a quality to complement other experiences in the region is a key gap (AEC Group 2013) - Halls Gap perceived by consumers as overpriced and lacking dining alternatives. - Lack of arts and cultural activities (ispy Research): Halls Gap perceived by consumers to lack a cultural heartbeat and thus pulls The Grampians back towards 'Basic Needs'. - Across much of the Grampians Tourism Region the arts and culture product does often display themes anticipated from the region by tourists such as nature, adventure, local food and wine and rural lifestyles. This weakens the appeal of arts and culture activities in the region. - Perceived lack of diversity of activities including festivals and events (for all ages and seasons/weather). - A perceived lack of variety/choice of accommodation: "It's basic – there's not always something to do. It's not high end and there are not many attractions past bushwalks and look outs." A "lack of sophistication around ancillary amenities and experiences" including relatively basic standard of accommodation (lack of 5 star facilities). In identified real tourism gaps, there is a need to improve the basics. That is knowledge of availability of an array of accommodation alternatives particularly those offering four or five star standard. - A lack of integration of local produce, history and culture through dining, retail, events and activities, perceived lack of diversity of activities including festivals and events (for all ages and seasons/ weather).
Opportunities	Threats
<ul style="list-style-type: none"> - Consumers seek experiences offering comfort, choice, diversity and that heightens the appreciation of the region by celebrating its assets and culture in everything they do. Celebrate the uniqueness of the region including the people, history & culture of region. - A more diverse range of all weather activities and experiences including markets, festivals and events. - Arts and culture activities are popular with the key markets of Halls Gap a window into local culture, creativity and experiences. - Visitors seek experiences offering comfort, choice, diversity and that heightens the appreciation of the region by celebrating its assets and culture in everything they do. - Diversity and quality of accommodation was identified as a specific priority for the Grampians Tourism Region - Options for Pampering helps set places apart creating a halo of excellence – especially when integrated with the natural environment 	<ul style="list-style-type: none"> - Halls Gap is perceived by consumers as overcrowded on long weekends, overpriced, limited in accommodation styles, lacking dining alternatives and lacking medical help. - Upmarket accommodation is no longer a way to differentiate a destination – it is becoming a 'must have' – even if all people don't use the assets – the fact that they exist helps build regional reputation/ desirability. Type and choice of accommodation is an important marker of destination desirability (iSpy Research).

4.3 Investment opportunities

The background report for the Grampians Tourism Destination Plan and Roadmap identified a number of Investment Opportunities. These include:

Related to gaps and issues identified in food and wine tourism:

- Food, wine, arts stalls or retail fronts in Halls Gap representing the various areas from the Grampians Tourism Region
- Quality local produce retail offering at Halls Gap and other key tourism villages (e.g. Avoca, Pyrenees Shire Council)
- Pyrenees wineries shopfront in villages (Beaufort, Halls Gap)
- Quality restaurant and café developments in towns and villages
- Weekend and peak season casual food stalls in Halls Gap

Related to Family activities:

- Water Park at Halls Gap
- Children’s adventure / learning products around Halls Gap
- Indoor ‘outdoor’ attractions (e.g. nocturnal animal zoo)
- Grampians kids club / childcare centre at Halls Gap

Related to accommodation product:

- Diversity and quality of accommodation was identified as a specific priority for the Grampians Tourism Region
- Boutique accommodation at Dunkeld, Halls Gap, Mt Zero, etc.
- Grampians country club (including accommodation, golf, functions and weddings)
- Spa/Health retreat

Related to attractions and events:

- Wildlife Arts Museum of Australia
- Tourist rail through Halls Gap valley
- Bushfire education centre

In the Grampians Tourism Region, no specific investment opportunity was identified in the Roadmap for Halls Gap. There is an opportunity to develop a viable project, or invest in improving the current arts and cultural offer. Good tourist experiences require civic pride (welcoming and proud community), activities to do in all weather (for all ages) and festivals, markets and events on offer.

Updated approaches (e.g. signage, sculptures and viewing areas) to Halls Gap was also identified as a key area for future investment.

5 PLANNING CONTEXT

Over the past 25 years there have been numerous planning reports prepared for the Halls Gap area, from the 1989 *Profile Report* to the most recent Shire-wide *Municipal Strategic Statement and Local Planning Policy Framework Review*, in October 2014. However, implementation of planning recommendations related to Halls Gap has been stalled over the past 15 years, with a clear need to update the statutory framework of the town to set in train development objectives for the coming decades. This Chapter reviews current key planning documents pertaining to Halls Gap.

A comprehensive review of planning reports prior to 2009 was undertaken by James Goldsworthy Consulting. This covered:

- Halls Gap Townscape Plan (1999)
- A Land Use Planning Framework for the Halls Gap Lake Bellfield Area (1990)
- Open Space, Sport and Recreation Strategy 2014
- Municipal Strategic Statement (currently under review)
- Halls Gap Strategic Framework Plan
- Halls Gap Urban Design Framework
- Halls Gap Recreation Strategy, (April 2012)
- NGSC Tourism sector plan
- Grampians Tourism, Travel to the Grampians statistical reports
- Northern Grampians Shire Council's Economic and Tourism Report Cards

This report will not repeat this exercise, but rather reiterate key findings and recommendations.

As noted in the Goldsworthy report, there has been no local amendments to the local planning scheme since 2000. As such, this Masterplan represents a significant opportunity to revisit development assumptions, desired goals and planning-based enablers to secure a strong foundation for future investment into Halls Gap.

The section below profiles key planning controls, planning and policy reports, and their recommendations, relevant to this study.

5.1 Planning framework

There are a number of documents and overlays that apply to Halls Gap including:

State Planning controls:

- State Planning Policy Framework
- VPP Practice Note: Applying the Rural Zone
- VPP Practice Note: Bushfire Management Overlay and Bushfire Protection (2011)
- VPP Practice Note: Local Planning for Bushfire Protection (2011)
- Victoria in Future (2014)
- Zones
- Framing Zone

Local Planning Controls

- North Grampians Local Planning Policy Framework
- North Grampians Residential Supply Strategy (2005)

- Halls Gap Urban Design Framework (2001)
- Halls Gap Land Use Strategy Analysis (2009)
- Halls Gap Floor Study (2008)
- Halls Gap Townscape Plan (1998)

5.2 Key Local Government Planning Objectives

Objectives for the future development of Halls Gap are guided by the following key Council documents:

- Northern Grampians Council Plan 2013-2017
- The Municipal Public Health and Wellbeing Plan (HWP)
- Land Development Strategy 2013-2017
- Economic Development Strategy 2009-2012 (EDS) current.

Council Plan

The Council Plan sets out the broad vision and priorities of the Council for the future development of the region. It confirms that encouraging new investment, supporting existing businesses, and reducing red tape and unnecessary regulation will be a major focus during the coming Council term. Key directions relevant to the development of this Masterplan include:

Economic Strategy

- Developing Halls Gap as a tourism resort town and Great Western as a food and wine village
- Attracting and encouraging new enterprises while supporting existing businesses

Social, Community and Environment Strategy

- Providing access to arts and cultural programs and events
- Providing passive and active recreational opportunities for residents and visitors
- throughout the shire

Emergency and Risk Strategy

- Implementing measures to reduce the causes and effects of emergencies

Data and Information Strategy

- Developing a public WIFI access strategy in the main retail precincts of Stawell, St Arnaud and Halls Gap

Red Tape Reduction Strategy

- Reduce unnecessary regulation and advocate for the removal of regulatory burdens from other tiers of government
- Reviewing all internal policies and procedures to move towards a risk matrix approach and remove duplication or multiple handling of requests

The Municipal Public Health and Wellbeing Plan (HWP)

The HWP is strategically aligned with the Council Plan, and recognises Council's role in proactively contributing to health promotion and prevention through four targeted priority health areas:

1. Connected Communities
2. Healthy & Safe Built Environments
3. Accessible Services
4. Healthy & Active Lifestyles

A new Community Development clause is to be introduced into the Local Planning Policy Framework that integrates these directions.

5.3 North Grampians Shire Local Planning Policy Framework and MSS Review (October 2014)

A Municipal Strategic Statement (MSS) Review was undertaken in October 2014, to respond to key local issues, changes to demographics and other external influences on the municipality and to ensure that the local municipality is positioned to proactively respond to these influences where required through the land use planning system.

An overarching recommendation was that local area planning for Halls Gap is a priority. The Review recommended integrating the findings of the 'Triangle Review' and the proposed Halls Gap Masterplan, recognising that this will be important in outlining a clear strategy for Halls Gap that address issues of conservation, environmental risk, commercial and residential development while constructing and environment for investment.

The MSS Review noted the findings from the previous Planning Scheme Review (PSR) in 2009, and reiterated the following recommendations:

- the application of the Farming Zone was 'applied excessively broadly'. In particularly areas where the application of the Rural Conservation Zone could more appropriately applied (e.g. privately owned foot hills of the Grampians Ranges – Valley Floor North) to better reflect land management hazards and high biodiversity value.
- the supply of Rural Living Zone (RLZ) was over supplied and required review. Triggers for the application of dwellings in the RLZ and other Rural Zones still require review and relaxation to enable greater efficiency in the determination of applications. In particular, there remains a need (building on the recommendations of the PSR Report) to reconsider the construction of new dwellings in the Rural Living Zone; and, the extension of existing dwellings and outbuildings in other Rural Zones required review.

The MSS Review recommend that a rural living and rural land use strategy be completed to review land supply, with consideration of Amendment C15 (the new zone reforms; recommendations of the triangle review), enabling consolidation of the Rural Living Zone schedules.

Other key themes of the review were the implementation of outcomes of the Triangle Review, the impact of the new zones, changes to planning regulations due to significant flood and fire events, and native vegetation and biodiversity provisions. These are discussed in greater detail below.

Implementation of outcomes of the Triangle Review

The MSS Review reiterated the need to realise the recommendations of the Triangle Review and noted the need to update the Urban Design Framework 2001 and, in the interim, make it more broadly available. It sought to bring greater alignment of the Halls Gap and Triangle Study but noted that the Triangle project should be formally incorporated into the Northern Grampians Planning Scheme.

The report noted that a Masterplan process was soon to commence, and that this presented an opportunity to consolidate policy setting across a range of precincts within Halls Gap and potentially to also provide important strategic implementation material relevant to the Halls Gap locality.

Key issues raised requiring policy review included:

- Focussing commercial activity and diversification of retail offering within the Triangle;
- Rezoning Farming Zone land to Rural Conservation Zone;
- Rezoning Low Density Residential Land to General Residential Zone
- Encouraging greater Commercial activity within Halls Gap;
- Ensuring consolidation of residential activity in proximity to Halls Gap to the east where there is less environmental risk.

New Zones

The review noted the introduction of the new Commercial and Residential Zones in the Victorian Planning Policy Framework, replacing the previous Residential Zones 1-3 and Business Zones 1-5 with three residential zones (Residential Growth Zone, General Residential Zone and Neighbourhood Residential Zone) and two commercial zones (Commercial 1 Zone and Commercial 2 Zone). The reform of zoning provisions also included changes to the rural zones, including the Farming Zone, Rural Conservation Zone and Rural Activity Zone.

The MSS Review noted the opportunity for strategic direction to be articulated through the application of the new suite of zones in future land use strategies.

Flooding

The floods in 2011 have led to significant analysis and assessment of regional based flooding studies. Amendments have been prepared to apply flood provisions through the Planning Scheme, including Amendment C31 (Halls Gap) and Amendment C37 (Glenorchy). The MSS Review recommended that Amendments to introduce Land Subject to Inundation Overlay (LSIOs) in both Halls Gap and Glenorchy are initiated for Ministerial authorisation, subject to adequate information provision to support the amendment.

Bushfire Management Overlay

Managing bushfire risk and ensuring protection of life now has precedent over any other state policy. The MSS Review notes the impact of Amendment VC83 (introduced in 2011), which made extensive policy changes for consideration of bushfire hazard during the planning process. This process is guided through the application of Bushfire Management Overlay (BMO and/or WMO) and supporting policy.

Native Vegetation and Biodiversity Provisions

The MSS Review noted that new native vegetation guidelines have been developed by the Department of Environment and Primary Industries. The guidelines are incorporated into the Victoria Planning Provisions and all planning schemes in Victoria.

The MSS called for further clarification of planning roles and responsibilities for emergency management and environmental risk based land use planning led by State Agencies to reduce policy overlap and redundancy at the local level.

5.4 Grampians Region Foundation Villages Project

The key objectives of this project are to improve the presentation of the villages, introduce new product that better meets the needs of locals and visitors, and provide incentives (direct and through enhanced completion) for reinvestment and update of existing the accommodation, retail and dining offer.

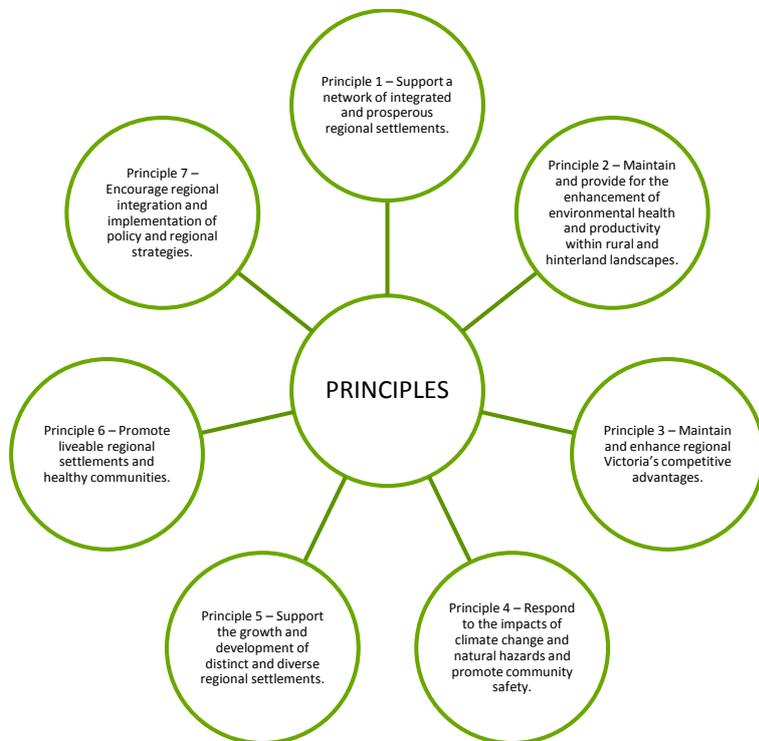
Halls Gap and Dunkeld are currently the most developed and recognisable villages in the Grampians Region for tourism. However, Halls Gap is commonly perceived as not meeting the standards of the surrounding natural environment. Key mechanisms recommended to remedy this include:

- Streetscape and public areas redevelopment
- Town planning mechanisms such as simplification of some processes or progressing planning hurdles on critical sites prior to market interest (for e.g. a higher density development footprint linked to public space outcomes could be pre-approved on strategic sites prior to marketing to improve prospects of take-up and development)
- Investment attraction of new developers (ideally complemented by incentives packages) with a focus on accommodation and retail

- Attraction of new retailers and restaurant operators through measures such as relocation subsidies, in-kind promotional support or matched infrastructure investments
- Investment attraction of new service providers, including those potentially linked to service opportunities on the Grampians Peak Trail
- Development of better linkages to attractions, producers and businesses in the broader region, through linked shopfronts, business relationships and presence at events and markets. For example, interest has been expressed in a shopfront for Grampians region wines in Halls Gap

The Masterplan for Halls Gap is a key initiative to respond to these recommendations.

FIGURE 7 REGIONAL SETTLEMENT PLANNING PRINCIPLES



Source: Wimmera Southern Mallee Regional Plan (2010)

5.5 Ararat Stawell Halls Gap Triangle Project 2012

Ararat Rural City and Northern Grampians Council produced the Triangle Rural Zone Review for the Ararat/Stawell/Halls Gap bounded triangle in 2012. The Triangle is located within the State Government's Grampians Region and is split between two subregions: Central Highlands and Wimmera Southern Mallee. The Triangle Review sought to determine the most appropriate use of rural land between the localities of Stawell, Halls Gap and Ararat.

Key objectives of this project were to:

- Develop a 'spillover' tourism investment zone for a variety of tourism developments that require greater space than available at Halls Gap
- Preserve the village atmosphere in Halls Gap
- Maintain the quality of entrances to Halls Gap under future development pressures

The Review looked at options for planning changes of this broader zone to better enable tourism outcomes and a number have been adopted by Ararat Rural City and Northern Grampians Council. However, the majority of the area remains Farming Zone, which prohibits many complementary and dedicated tourism uses. The Pomonal/Lake Fyans/Halls Gap East area has a special roll within this triangle as the commercial spill over zone and complement to the tourist village of Halls Gap.

The Pomonal/Lake Fyans/Halls Gap East area sits adjacent to Halls Gap and the Grampians National Park and is predominately cleared grazing land. Halls Gap is constrained in size and as it develops further is not a suitable location for more land intensive tourism developments. There is a need for the Pomonal/Lake Fyans/Halls Gap East 'triangle' to be supported as a spill-over development location for land-intensive tourism operations complimentary to the Halls Gap village product. This is already occurring with establishments such as the Lake Fyans Holiday Park, Grampians Gardens Tourist Park, Grampians Parkgate Resort and Halls Gap Zoo. The Wildlife Art Museum of Australia is also proposed for this area.

The review notes that Halls Gap is the dominant tourism destination in the Grampians Region and will remain a key focus of investor attention into the future. It is suggested that a range of tourism developments may work well with the destination's market, however, caution needs to be exercised to ensure that the character and atmosphere of the area is preserved. For opportunities outside of the Halls Gap Village, requirements for substantial areas of land or other factors mean that they cannot be located in Halls Gap.

The Review recommends that facilitating these types of developments in the adjacent Pomonal/Lake Fyans/Halls Gap East area would allow Halls Gap to preserve its character and work towards improving the village further whilst enabling more intensive tourism developments in the general area.

It further noted the need to develop a structure plan for this area, potentially in concert with the Halls Gap Masterplan.

A number of land use changes were proposed for the Halls Gap area. Of particular relevance are recommendations related to the land use zoning for the Valley Floor area, which are detailed below.

There is currently a planning scheme amendment underway seeking to respond to recommendations of the review, including the rezoning of the Valley Floor area from Farming Zone to Rural Living Zone.

FIGURE 8 TRIANGLE PROJECT – STUDY AREA AND CONTEXT



Source: Planisphere, 2012

Valley Drive, Halls Gap

The Triangle Project made specific recommendations for Valley Drive. The area abuts the commercial centre of Halls Gap (<500m), is generally cleared of trees and has a relative low flooding risk. It has been identified in previous strategic studies as suitable for tourist related development.

A submission was made by Locality Building Design and Management for rezoning from Farming Zone to a more appropriate and flexible zone which reflects its current use and development potential. The subject area is presently used and developed for residential and tourism purposes, including:

- A dwelling located to the north of the area. It is noted that this site has approval for the development of a Bed and Breakfast.
- Tourist accommodation – ‘Aspect Villas’ - located to the south of the area. The development includes a residence, three one-bedroom self contained holiday villas and a wetland.
- Planning approval has recently been granted for the development of a health and spa facility, including spa, sauna, gym, lounge, lap pool and treatment rooms to the east of the area.

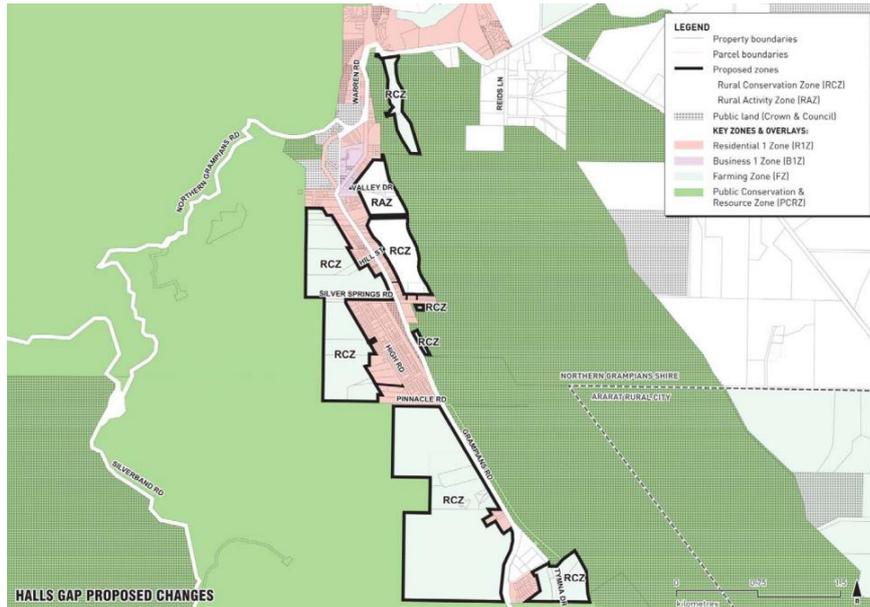
Three options for the future planning controls of identified Farming Zone land on Valley Drive were considered in the *Triangle Project*, including to rezone the land to Rural Conservation Zone, consistent with the recommendation for the balance of the valley floor; rezone the land to a residential zone, such as the Low Density Residential Zone or Residential 1 Zone; or rezone the land to Rural Activity Zone and apply the Development Plan Overlay or Design and Development Overlay.

The third option was supported, with the rationale that this would best support the current and desired future uses of the site. Rural Activity Zoning supports commercial and tourism development which complements the particular landscape feature and natural attractions of the area. The application of the Development Plan Overlay (or Design and Development Overlay) would require the landowners to adopt a strategic and integrated approach to the future development of the area, including the investigation of its environmental, landscape and community values and risks, before development

could proceed. It would also be possible to include design guidelines for future development, to ensure it is sensitive and responsive to its surrounding context.

This rezoning will support appropriate tourism based mixed use development.

FIGURE 9 TRIANGLE PROJECT – HALLS GAP PROPOSED ZONING CHANGES



Source: Planisphere, 2012

5.6 Wimmera Southern Mallee Regional Strategic Plan (2010)

The Wimmera Southern Mallee Regional Plan (2010) contains a statement of desired future development for the region over the next five years; a description of the region's population and major drivers of change; goals, strategic directions and areas for action; and a governance and implementation plan. It is recognised in through the Northern Grampians Planning Scheme (VC106),

The Plan refers to Stawell, Ararat and Halls Gap – the Triangle – as a community of common interest. It acknowledges that there is significant movement between the towns and that the area provides a focus for tourism and employment in the region.

The goals, strategic directions and areas for action are grouped under four key themes:

- Economic growth, infrastructure, education and training
- Water, natural resources and sustainability
- Community well-being
- Settlements and land use planning.

Key findings relevant to this study include:

- That while like most rural regions the area has experienced population decline, recently the region's population has grown due to Horsham's continued growth and some small towns where population

decline and halted and where there is now slight growth. Consequently communities are becoming more engaged in opportunities to plan and drive change for community benefit.

- Horsham Rural City is the only municipality predicted to experience significant population growth over the next 20 years.
- The region must and will become better connected through improved transport and telecommunications infrastructure and services. This is essential for the region to continue to be competitive as a place to live and do business.
- Halls Gap is a focus for tourism associated with the Grampians and provides employment to residents in Stawell and Ararat. These towns also act as gateways to the Grampians.
- A key identified Area for Action was infrastructure provision in Halls Gap, Wartook Valley and Natimuk/Mount Arapiles to service existing tourism demand.
- Vacant shops and shop tops, particularly in smaller towns where retail has relocated to larger centres, provides an opportunity for alternative accommodation that is central and has the potential to be refitted to provide a range of residential options. Current planning policy restricts Council capacity to facilitate this transition.
- Articulation of seven principles to guide future planning and development which are:
 - Support a network of integrated and prosperous regional settlements
 - Maintain and provide for the enhancement of environmental health and productivity within rural and hinterland landscapes
 - Maintain and enhance regional Victoria's competitive advantages
 - Respond to the impacts of climate change and natural hazards and promote community safety
 - Support the growth and development of distinct and diverse regional settlements
 - Promote liveable regional settlements and healthy communities
 - Encourage regional integration and implementation of policy and regional strategies

6 GOVERNANCE AND IMPLEMENTATION

The Halls Gap Masterplan is wholistic in its scope. That is, its action agenda touches on all aspects of the town's quality of life and its competitiveness as a tourist destination. Accordingly, the Plan contemplates initiatives for the reform of planning rules, the development of new infrastructure, the attraction of complementary businesses to build a compelling tourism offer and the packaging of new tourism experiences.

This means the Plan does not fit neatly within the bailiwick of any government agency, regardless of level. The Northern Grampians Shire, State Government tourism authorities, infrastructure providers and, indeed, the local business and residential communities will variously have major interests which will be affected by successful implementation of the Masterplan.

It is important that the Masterplan continues to be seen as an integrated strategy. It is not advisable to break it up into a series of individual actions and then allocate these to responsible authorities for implementation driven by internal priorities. This will risk forfeiture of vital synergies, as well as efficiencies in the co-ordinated roll out of the action strategies.

Traditionally, policies such as the Halls Gap Masterplan have been hosted or 'auspiced' by one of the following entities:

- The local Council, acting as 'place manager' as well as co-ordinator and supplier of significant infrastructure;
- The regional tourism promotion agency, which focusses on one of the key drivers behind the plan's formulation; and
- The local chamber of commerce or equivalent, which, perhaps, is best placed to identify priorities in the implementation process.

None of these models would appear to be ideal in this instance.

Notwithstanding its place making remit, the Shire Council has primary responsibility for a relatively narrow set of actions within the Plan's broad spectrum of aspirations. Moreover, Council's accountabilities run much wider than Halls Gap, so balancing its attention to this opportunity versus others will be a continuing challenge.

Tourism agencies tend to have an even more narrow focus.

Meanwhile, the local business community's natural, and appropriate, mode of operation tends to be advocacy rather than implementation.

Against this background, there may be scope for a customised and innovative approach to the ownership and implementation of the Halls Gap Masterplan.

The Plan could be placed in the custody of an incorporated community board or enterprise, comprising appropriate stakeholders from local businesses and residents. This board could be commissioned to maintain and implement the Plan with tri-partite resourcing from Council, State Government and local businesses.

The tri-partite resourcing would be directed at funding an executive capacity to advocate for, stimulate and co-ordinate investment in Halls Gap in line with the Masterplan, not least from the private sector. The various Council and State Government agencies which have assigned actions under the Plan would also be encouraged (and co-ordinated) by this executive capacity in the discharge of these responsibilities.

A service contract, with appropriate KPIs linked to staged implementation of all facets of the Plan, would accompany this tri-partite resourcing. Council would be a logical Principal in this contracting arrangement.

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