



May 18, 2007

Marketing Analysis

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Marketing Analysis

Background

Agriculture Future of America

Agriculture Future of America (AFA) is an organization that is nationally recognized for its excellence in leader training and career development for college men and women and young professionals in the agriculture industry.

Founded in 1996 by R. Crosby Kemper and other agri-business leaders in Kansas City, AFA offers leader and career development training and community-based academic scholarships for college men and women pursuing a career in an agricultural-related field.

AFA promotes intern opportunities within an extensive network of agricultural companies, governmental agencies and agricultural service organizations. These organizational partners work closely with AFA to place students in internships across the country. Partners are encouraged to sponsor their intern to the annual AFA Leaders Conference, offering an opportunity for students to network with industry decision-makers representing various career disciplines.

Leader and career development training is an important piece of AFA. The focal point of this training is the AFA Leaders Conference which provides delegates with a four-day personal and professional development experience. AFA values the commitment from the industry to make this event successful, currently AFA is averaging three students to every industry professional. These industry professionals provide the leadership and facilitation of round table discussions, information panels, recruitment of students and professional networking which make the annual Leaders Conference a success.

The Leaders Conference is planned and staffed by the AFA Student Advisory Team. These twelve collegiate individuals are selected through an application and interview process and serve the AFA organization for one year. Along with the Leaders Conference, team members also make business visits and serve AFA in several ambassadorial capacities. AFA provides additional training for this group around media relations, team leadership and presentation skills.

The AFA scholarship program is a leverage partnership that requires a community financial commitment. A community raises resources and receives matching funds from AFA. As a component of this scholarship program, a portion of the funds support each recipient to attend the AFA Leaders Conference.

AFA has a working relationship with other youth development organizations such as the FFA, 4-H and collegiate social and academic groups. They share many of the same beliefs about youth development and the future of the agricultural industry. The primary focus of 4-H is early agricultural youth development and FFA serves junior high and high school students. AFA's principal focus is on collegiate men and women.

The contribution made by the AFA organization to rural communities in America is invaluable. Instilling pride and the ability to be effective leaders in our nation's agricultural youth is an enormous step toward bettering the future of our industry. The communities which strongly support their agricultural youth through sponsoring the scholarships necessary for students to become involved in AFA will see an immeasurable return.

Many agree, investing in human capital preparation is the most important thing that we, as agriculturalists, can do to ensure the security and viability of our industry's future. Agriculture Future of America is a vehicle by which we can pursue that goal.

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Agriculture Future of America

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|----------------|---|
| Vision | To be a catalyst in the preparation of a new generation of agriculture leaders. |
| Mission | To create partnerships that identify, encourage and support outstanding college men and women preparing for careers in the agriculture and food industry. |
| Values | <ol style="list-style-type: none">1. Embrace the future2. Increase competitiveness of the food/agri-science industry3. Strengthen rural America4. Students as leaders5. Learning is a life-long process6. Mentoring is a responsibility and opportunity7. Networking is a personal asset |
| Goals | <ol style="list-style-type: none">1. To be the source that attracts, refines and promotes leaders in the Agriculture industry.2. To offer students superior/strategic training, mentoring and networking experiences that help them develop personal and professional competencies, gain self-confidence and demonstrate emotional intelligence.3. To increase awareness of AFA and its growing service areas and continually manage the expectations of its brand.4. To continually research, solicit and secure resources that support AFA's goals for program growth and expanded infrastructure.5. To continually expand AFA's partner base to identify a new generation of leaders.6. To support and utilize the Alliance through collaboration, deliberation, and inspiration while equipping them for innovation, reformation and reparation. |

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Founder

R. Crosby Kemper, Jr.

After serving two years in the U.S. Navy and attending the University of Missouri in Columbia, Missouri, Mr. Kemper began his banking career in 1950. His first position with what was then called City National Bank and Trust was on the night shift of the bank's transit department. He later went on to work in nearly every department within the company before being named executive vice president in 1957, president in 1959, chairman and CEO in 1971 and senior chairman of UMB Financial Corporation in 2001 until his retirement in 2004.

UMB Financial Corporation is one of the largest independent banks in America. Headquartered in Kansas City, Missouri, the company offers banking and related financial services to individual and business customers. It owns and operates 141 banking centers throughout Missouri, Illinois, Colorado, Kansas, Oklahoma, Nebraska and Arizona.

During the course of his 54 years with the company, Mr. Kemper built a reputation as a leader in Kansas City banking and civic circles. His community activities have included involvement with: Agriculture Future of America, Albrecht-Kemper Museum, American Royal Association, Bacchus, Beta Theta Pi fraternity, Boy Scouts of America, Children's Mercy Hospital, Heart of America United Way Council, Historic Kansas City Foundation, Jewel Ball, Kansas City Art Institute, Kansas City Missouri Chamber of Commerce, Kansas City Symphony Foundation, Kemper Museum of Contemporary Art, Lyric Opera, Research Hospital, Rockhurst College, and Starlight Theatre.

Mr. Kemper founded AFA in 1996 and is a lifetime member on its board.

President/CEO

K. Russell Weathers

Throughout his career, Mr. Weathers has worked to build organizations for young people where they can learn and practice life skills. He has been an integral part in helping young people develop their leadership potential and has continued to be a partner and a support system as they move into adulthood.

Mr. Weathers worked for sixteen years with Farmland Industries where he coordinated the Youth Leadership Conference held each summer. He later moved to National 4-H Council where he served in several roles, including Vice President of Education Services.

Mr. Weathers left 4-H in 1990 when he became Chief Executive Officer of the Camp Fire Boys and Girls organization. He provided leadership for this youth development organization during a time when it was changing its image from one of a camping organization for girls to an organization that focused on life skill development for girls and boys.

Mr. Weathers became President/CEO of Agriculture Future of America (AFA) in 1996. AFA was created to provide career development opportunities for college age men and women pursuing careers in agriculture.

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Agriculture Future of America

2006 Board of Directors

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Kansas State University

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Chairman, Agriculture Future of America

Mariner Kemper
Chairman and CEO
UMB Financial Corporation

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Sosland Publishing Company

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Agriculture Future of America

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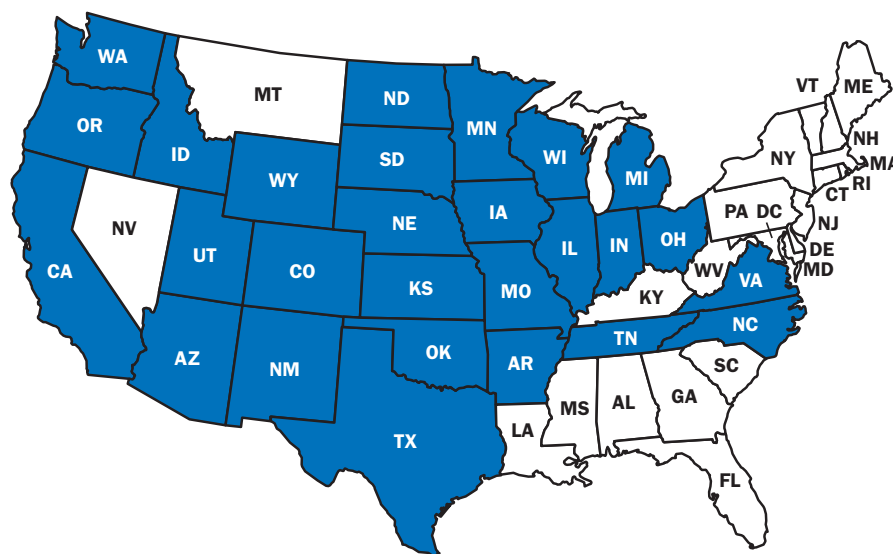
Agriculture Future of America

Identifying and Maximizing Human Capital Since 1997

- ▶ AFA has partnered with rural community partners, colleges and universities, businesses, corporations, and foundations to provide more than 1000 scholarship awards for a total of \$4.2 million.
- ▶ More than 4000 agriculture students from more than 63 colleges and universities in 27 states have participated in leader and career development training through the AFA Leaders Conference.
- ▶ More than 100 rural community partners in eight states, with nearly 1,500 individual donors annually have partnered with AFA to identify students and support their academic and leader development through AFA's community-based scholarship program.
- ▶ More than \$2.5 million has been invested in leader and career development training.
- ▶ Annually, more than 100 Human Resource representatives attend the AFA Opportunity Fair and provide follow-up to support the hiring process.
- ▶ Hundreds of hours of volunteer participation by agribusiness executives on AFA career, industry update, and leader development panels.
- ▶ Business, education, and industry experts bi-annually review and endorse AFA's Leaders Conference program content.
- ▶ Human Resource managers and agriculture recruiters help AFA promote career opportunities through internships and full-time employment.
- ▶ AFA annually assists in the placement of more than 100 interns.

Scope of Student Participation

AFA has provided leader and career development training to students from the following states:

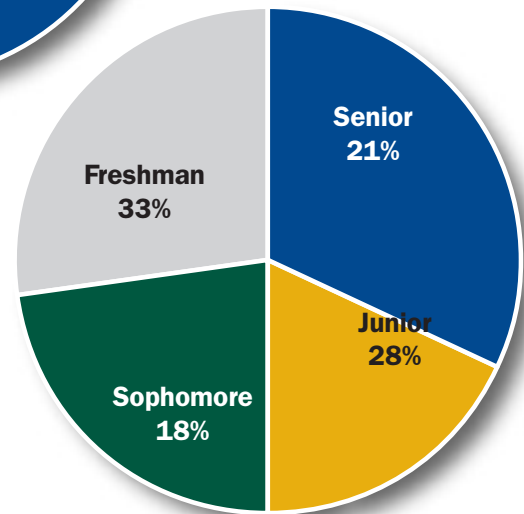
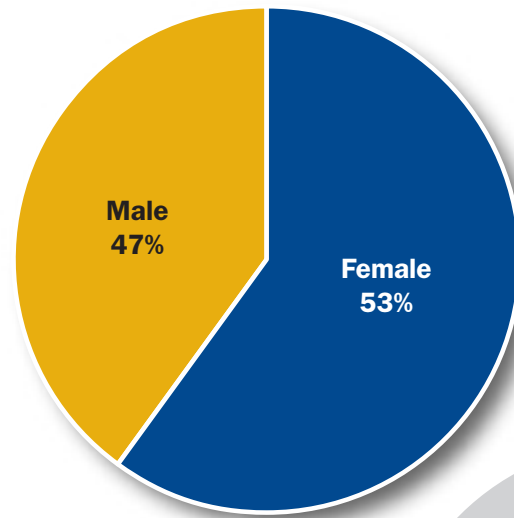


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Agriculture Future of America

Scope of Student Participation (Continued)



Participating degree programs include the following:

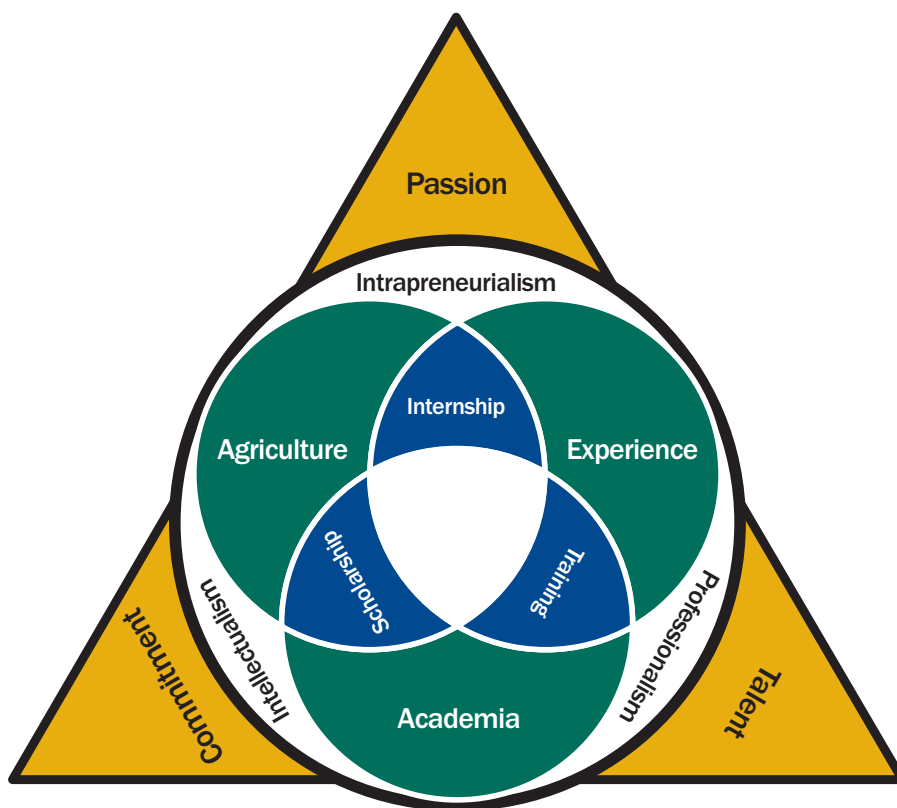
- ▶ Agriculture Business
- ▶ Agriculture Economics
- ▶ Agriculture Education
- ▶ Agriculture Engineering
- ▶ Agriculture Leadership
- ▶ Agronomy
- ▶ Ag Systems Management
- ▶ Animal Nutrition
- ▶ Animal Reproduction
- ▶ Animal Science
- ▶ Biology
- ▶ Business Management
- ▶ Communications
- ▶ Chemistry
- ▶ Dietetics and Human Nutrition
- ▶ Entomology
- ▶ Finance
- ▶ General Agriculture
- ▶ GPS/GIS
- ▶ Horticulture
- ▶ Hotel Restaurant Management
- ▶ Industrial Engineering
- ▶ Journalism
- ▶ Landscape Architecture
- ▶ Marketing
- ▶ Meat Science
- ▶ Mechanical Engineering
- ▶ Milling Science
- ▶ Pre-Med
- ▶ Production Agriculture
- ▶ Public Policy
- ▶ Quality Assurance
- ▶ Sales
- ▶ Transportation Logistics
- ▶ Turf Management
- ▶ Veterinary Medicine

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Agriculture Future of America

AFA Leader Development Model



AFA Leader Development Model

 Inherent Abilities  AFA Mechanism  AFA Programs  AFA Process

AFA has identified and trained men and women who share the belief that the production, processing and distribution of food and fiber, along with support for agriculture business services, are vital for our nation's economy, both now and in the future. These men and women also share three characteristics – they are talented, passionate and committed to a career in agriculture.

AFA's mechanisms for leader development are agriculture, experience, and academia through which the AFA scholarship program, intern program, and training program are implemented.

AFA's success comes from its unique partnerships with communities, organizations, colleges, universities, and individuals that support intern opportunities, leader development and scholarships. This network creates an atmosphere that stimulates the development of professionalism, intrapreneurialism and intellectualism – each a key factor in human capital development.

The term human capital is the recognition that people are important and essential assets who contribute to development and growth of organizations and businesses, similar to physical assets such as machines and money. The collective attitudes, abilities and skills of people contribute to organizational performance and productivity. Expenditures in identification, training, development, health and support is an investment, not just an expense.

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Agriculture Future of America

AFA Partnerships

Community Partners

AFA community scholarships are the primary identification tool to recognize and support outstanding rural young people interested in an agriculture career. AFA Community partners provide scholarships, intern opportunities and support leader training for young people from their local communities.

Community volunteers coordinate all aspects of the program in their community. This is a year-round process that encompasses fundraising, promotion, solicitation, selection and recognition. In most AFA community partnerships, committees are formed to distribute the responsibility and increase community support.

Corporate and Individual Partners

These partners are organizations, foundations and individuals that annually invest in academic and leader development of college age men and women preparing for careers in the agriculture industry. The investment made by these partners support the annual leaders conference and leverage the investments made by community partners for academic scholarships. Additionally, these partners support the organizational capacity of AFA to provide high-quality programs.

Intern Partners

Intern partners believe that providing young men and women with intern opportunities has long-term benefits for the individual, the business, and society. Internships serve to recruit and retain talent for full-time, entry-level positions. They provide practical experience and mentoring relationships as well as sponsor interns to the AFA Leaders Conference in the fall following the student's internship.

Campus Partners

Campus partners are dedicated to providing students with value-added experiences needed to be successful in today's agricultural workforce. Through the AFA Campus Partners, students have additional resources to assist in finding jobs, internships and summer employment, while promoting and supporting AFA Leader development experiences.

AFA State Coalitions (State Funding Groups)

AFA State Coalitions provide resources for both AFA awareness and direct student support within each state. Each state coalition functions differently but all share the same goal to identify resources to support outstanding students from their respective state into AFA programs.

AFA Sponsors, Supporters and Volunteers

These partners assist with the promotion and advancement of the AFA mission while providing leadership and financial assistance to support AFA.

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Background

AFA Programs

Scholarship Program

AFA Communities

AFA communities are defined by the geographic scope where funds are raised and applications are accepted which may be a single rural community, county, business service area, or multiple rural communities.

AFA community partnerships are supported in eight states: Colorado, Illinois, Iowa, Kansas, Minnesota, Missouri, Nebraska and Oklahoma.

AFA Scholarship Qualifications

- ▶ Be a graduating senior from a high school in the designated community.
- ▶ Be enrolled (or enrolling) in an accredited college of agriculture seeking a Bachelor of Science degree in agriculture or agriculture-related major.

AFA is interested in the student's overall profile indicating he/she will succeed in a college environment and will provide strong leadership in their future careers. Candidates need not be ranked the highest in their high school class or be an elected leader.

AFA's Matching Funds

Academic Tuition + Fees = \$3,200: Local partners contribute \$1,600. AFA matches local dollars to establish a scholarship (paid to the academic institution).

AFA Leaders Conference = \$1,000: Local partners contribute \$500 towards registration to the AFA Leaders Conference and AFA provides matching dollars.

AFA Scholarship Requirements

Selected scholar must commit to attend the AFA Leaders Conference in the fall semester of the awarded scholarship year and remain in good standing with the institution to receive the academic scholarship.

The Selection Criterion

Selection is based on the following:

- ▶ **Essay** – 300-500 words describing how the student perceives the future of agriculture and why he/she is seeking to be a part of the industry.
- ▶ **Interview** – Based on the student's application, interests and essay.
- ▶ **Community Service** – Involvement in activities outside the student's education-related activities.
- ▶ **Student Group Activities** – Involvement within the student's education-related activities.
- ▶ **General Factors** – Includes work experience, financial needs, reference letters and other factors identified by the community committee.
- ▶ **Scholarship** – AFA recommends using a high school GPA of 3.0/4.0.

The Promotion Committee

The promotion committee is responsible for creating awareness of the AFA Scholarship program. The committee has \$200 per scholarship to support community awareness. AFA provides support materials and guidelines for the committee to use.

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AFA Programs

Internship Program

The objective of an internship is to place a student in a practical work experience where his or her classroom education may be enhanced and the student can explore career opportunities and network with potential employers. Testimony of students provides feedback on how integral intern or work experience is to the growth process and career development of them and their peers.

AFA has created intern tools to support both employer and intern in planning, implementation and evaluation of a productive work experience. Planning, mentoring and evaluation of an internship adds value to the experience.

Competencies and Developmental Areas

The following competencies are desired outcomes, which may be developed during the internship. Competencies fall into three categories: general, industry- or business-specific, and managerial or intrapreneurial skills. Industry- or business-specific competencies include expertise in technical areas of the business and clinical skills associated with the business. An intern is a great prospect for future leadership within the organization. The intern's skill level will increase with exposure and responsibility.

- ▶ AFA interacts with students and intern partners to match student interests and organizational needs.
- ▶ AFA's annual Opportunity Fair provides an environment for students to visit with employers representing national and regional agri-business, associations and government agencies to learn about intern and full-time employment opportunities.
- ▶ AFA offers the AFA Intern Program Guide to assist interns and employers in the planning, implementation and evaluation of internships.
- ▶ AFA builds partnerships with intern partners to provide opportunities for mentoring, work experience and career exploration.
- ▶ AFA internships have successfully lead to full-time employment in all sectors of the industry.

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AFA Programs

Leader Development

- ▶ The annual AFA Leaders Conference provides personal and professional development opportunities while networking with agribusiness leaders.
- ▶ Programming provides students with training in personal assessment visionary communication and organizational change and leadership.
- ▶ AFA values students as leaders. The AFA Leaders Conference is planned and staffed by student leaders who serve on the AFA Student Advisory Team.
- ▶ The Leaders Conference is supported by financial donations and hours of volunteer participation by agribusiness executives and managers.
- ▶ More than 4,000 students and young professionals have taken part in AFA's leader and career development training, scholarship program and intern assistance.
- ▶ Students are sponsored to the AFA Leaders Conference through resources provided by their AFA scholarship, their college/university, their Intern Partner or personal funds.

Conference Objectives

- ▶ Create greater awareness of the career opportunities available in agriculture
- ▶ Support college men and women preparing for careers in agriculture
- ▶ Support the development of human capital for the agriculture and food industry
- ▶ Help students bridge the gap between academia and work
- ▶ Develop personal and professional skills necessary for life-long success
- ▶ Provide a forum for updates and discussions on industry trends
- ▶ Allow students to network with peers and leaders in agriculture, business, government, and education
- ▶ Create excitement about the future of agriculture
- ▶ Recognize AFA Scholarship recipients, AFA Partners, and other supporters

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AFA Programs

Leader Development (Continued)

The AFA Leaders Conference is a three-track program designed to offer college men and women three different personal and professional development opportunities. Students participate in the conference track that corresponds with their year in college.

A Three-Track Program

Track 1 program is designed for freshmen and focuses on assessment skills. Delegates complete personal assessment tools and receive training in resume development, time management, goal setting and personal skill development while assessing the opportunities available to them within their chosen career path.

Track 2 program is designed for sophomore/juniors and focuses on communication skills and preparation for employment. Dressing for success, first impressions, critical thinking, team leadership roles and personal ethics are addressed as a part of this program.

Track 3 program prepares junior/seniors to live and work in a global market. Sessions include managing personal change, stress management and preparing for employment. Delegates participate in discussions focused on rural policy, personal financial management and international agriculture business. There is a high level of executive mentoring on this track.

AFA partners with Franklin Covey to provide resources for personal development. At each level of the program, students further enhance skill sets and competencies through the following:

- ▶ *Focus: Achieving Your Highest Priorities*
- ▶ *The 7 Habits of Highly Effective People*
- ▶ *The Power Principle*

Presenters

Conference sessions are facilitated by more than 100 nationally recognized leaders in agriculture, business, government and education. Delegates have the opportunity to expand their personal and professional portfolios through discussions and training sessions with industry leaders. These leaders and mentors draw on their personal experiences as they participate in conference discussion sessions.

AFA Opportunity Fair

The AFA Opportunity Fair provides a unique environment for Human Resource representatives to communicate, advocate and mentor AFA students about opportunities available to students within the industry. Corporations, associations, colleges/universities that represent the entire industry actively recruit AFA students for intern, full-time employment and graduate studies.

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AFA Programs

AFA Alliance

In 2001, young agriculture professionals who gained a great deal from the Agriculture Future of America (AFA) program as college students formed a network to continue their professional development and seek camaraderie among peers. This network is known as the AFA Alliance and has expanded to include not only those who have had an AFA experience but others involved in agriculture seeking professional development and excited about making a contribution to the future of the industry.

The Alliance allows young agriculture professionals across the nation to gather, virtually and physically, to discuss the future of the agriculture industry and common situations they face. This alliance is about more than professional development and hot industry issues. It is about pooling resources from a diverse group of individuals who can help each other become better leaders in the agriculture industry.

Many opportunities for leadership exist, from coming to the annual forum, to participating on the planning committee, to mentoring AFA student leaders.

Mission

The Alliance serves passionate, driven, young professionals in the agriculture and food industry by providing environments that enhance their capacity as leaders and promote personal growth to help them build inter-industry relationships, influence others, be lifelong learners and contribute to a legacy.

This benefits the agriculture and greater community with a supply of skilled human capital and increased productivity.

Values

Relationships – Strive to connect people in the industry to share knowledge and grow together.

Service – Encourage volunteerism and mentorship in an effort to give back to the communities and organizations that first supported Alliance members.

Lifelong Learning – Continual education and thirst for knowledge drives the organization and its members.

Active Leadership – Take advantage of opportunities and use skills for the betterment of the industry in rural America.

Professional Development – Provide tools to help members grow professionally and be more effective in their chosen careers.

Industry Advocacy – Equip members to be industry advocates and help people understand the role of agriculture and the life sciences.

Shared Passion – Shared passion runs as a common thread that unites members from all segments of the industry.

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Background

Agriculture Industry

Agriculture, one of the oldest industries of our civilization, provides the food, fiber, and now energy, to the world. A traditional definition of agriculture takes on a very production-oriented view – the production and immediately related inputs and services associated with such. As time has moved us from an agrarian age through the industrial, technological and knowledge ages, agriculture has adjusted and grown as well.

Today, the definition of agriculture includes or is tied to wildlife and natural resources, life sciences, nutrition, technology, biochemistry and energy. All of these have their root or source in plant or animal life.

For this reason, AFA embraces this progressive definition of agriculture, drawing students from the hard and social sciences, embracing academic disciplines and industry issues. This is achieved in partnership with colleges and universities whose college of agriculture has evolved to serve the breadth of the industry.

There are significant trends that are changing the landscape of agriculture. The following points set the stage for the current look at agriculture and where it is heading.

Today's Farm, Farmer and Farm Family

- ▶ Twenty two million American workers produce, process, sell and trade the nation's food and fiber. But only 4.6 million of those people live on the farms – slightly less than 2 percent of the total U.S. population.
- ▶ Consumers spend \$547 billion for food originating on U.S. farms and ranches. Of each dollar spent on food, the farmer's share is approximately 23 cents. The rest are for costs beyond the farm gate: wages and materials for production, processing, marketing, transportation and distribution.
- ▶ On average, every hour, 24 hours a day, 365 days a year, around \$6 million in U.S. agricultural products – grains, oilseeds, cotton, meats, vegetables, snack foods, etc., will be consigned for shipment for export to foreign markets.
- ▶ It all means more jobs and higher wages across the nation. U.S. agricultural exports generate more than \$100 billion annually in business activity throughout the U.S. economy and provide jobs for nearly 1 million workers.

Agricultural Services

- ▶ The promotion, marketing and services related to agriculture inputs make up a growing part of the agriculture industry through the desire to specialize, differentiate or add value to agricultural products.
- ▶ From government agencies to for-profit support services to trade associations, agricultural services, agricultural service providers make up a large population of agricultural jobs in the U.S.

Technology

- ▶ Technology is having a profound impact on farming much the same as people would associate technological advances in such fields as manufacturing, biotech or dot-com businesses, though many might not realize it.
- ▶ Thanks to modern farming techniques and technology, America's farmers and ranchers are producing more food on fewer acres, leaving more open space for wildlife habitat. Modern farm practices free up millions of acres of wildlife habitat.
- ▶ A recent survey of young farmers and ranchers reveals that computers are

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Agriculture Industry

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used on 83 percent of America's farms. Nearly 75 percent of today's young farmers have a cellular telephone, and nearly one-third have access to the Internet, up from 10.5 percent from last year.

- ▶ Technology, in the form of software tools for management, to methane digesters turning byproducts into useable products (such as electricity), to animal identification systems, allows the industry to be more efficient, more productive and more profitable.
- ▶ Renewable fuels have brought new vitality to rural America. Alternative energies such as ethanol have continue to bring a new dimension to the agriculture industry.

Life Sciences, Biotechnology and Nutrition

- ▶ Animal and human healths intersect in the life sciences and nutrition, each helping the other through technological and biological advancements.
- ▶ Many increases in crop production are the result of biotechnology while also providing the opportunity for reduced pesticide applications, less soil tillage and reductions in associated fossil-fuel use.
- ▶ The agricultural community has long supported new techniques that improve production and help make food even more affordable for consumers. For examples, animals and crops have been selected for breeding for centuries resulting in improved disease resistance and bigger yields. Biotechnology simply gives the farmers the tools to speed up this process.
- ▶ Consumers and the environment are the end beneficiaries of new advances in biotechnology. Biotech advances that come to use on the farm will further ensure that American food and fiber products can remain cost-competitive both here and abroad.

Globalization

- ▶ Globalization and internationalization are not new to agriculture – since the 1970s farmers' incomes have been heavily dependent on their success in selling products in international markets.
- ▶ More recently the development of agreements such as GATT and NAFTA have been the focal point of much of the globalization discussion, with the emphasis on broader access to world markets, expanding exports of agricultural commodities, and, particularly, further processed agricultural and food products.
- ▶ Globalization stirs the need for agricultural products and service to be generated better, faster and cheaper to have a sustainable competitive advantage.

The Future – Career Opportunities

The growth, diversification, enhancement and globalization of agriculture coupled with the high percentage of retirees in the industry over the next ten years sets the stage for significant career opportunities for young people entering the industry.

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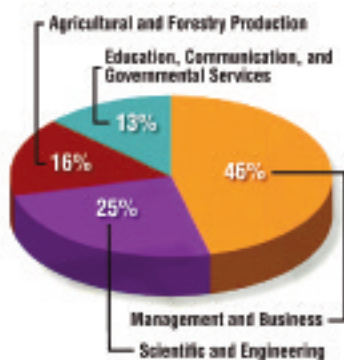
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Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

2005-2010

Employment Opportunities



The Big Picture

Employment opportunities for U.S. college graduates with expertise in the food, agricultural, and natural resources system are expected to remain strong during the next five years. We expect slightly more than 52,000 annual job openings for new graduates during 2005-2010, and some 49,300 qualified graduates available each year for these positions.

Annually, an average of approximately 32,300 new graduates from U.S. colleges of agriculture and life sciences, forestry, and veterinary medicine are expected to take jobs in the system. Other job openings will be filled by some 17,000 qualified graduates from allied higher education programs such as biological sciences, engineering, business, health sciences, communication, and applied technologies.

Four major factors will define the market for graduates during 2005-2010:

- ▶ Consumers and their preferences.
- ▶ Evolving business structure in the U.S. food system.
- ▶ New developments in science and technology.
- ▶ Public policy choices and food system security.

You'll find most opportunities in management and business, where graduates can expect more openings than qualified applicants. Graduates also can expect a large number of positions in scientific and engineering specialties. They'll find specialized niche opportunities in agricultural and forestry production. Ample qualified graduates are forecast for positions in education, communication, and governmental services.

New graduates can expect the best opportunities in:

- ▶ sales and marketing,
- ▶ veterinary medical specialties,
- ▶ food safety and biosecurity,
- ▶ forest ecosystem management,
- ▶ precision agriculture technologies,
- ▶ biomaterials engineering,
- ▶ landscape and horticultural crops,
- ▶ plant and animal genetics,
- ▶ specialty crops production,
- ▶ food and nutrition services,
- ▶ environmental science and management,
- ▶ food system nanotechnologies,
- ▶ plant and animal inspection,
- ▶ consumer information technologies, and
- ▶ animal health care and well-being.

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Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

Management and Business Occupations

Account Executive

Banker

Business Manager

Customer Service Manager

Economist

Financial Manager

Food Broker

Forest Products Merchandiser

Human Resources Manager

Insurance Agent

Landscape Manager

Market Analyst

Real Estate Broker

Risk Manager

Sales Representative

Management and Business Occupations

You can expect approximately 24,000 annual openings compared to about 20,200 graduates with expertise in these areas. In fact, of all projected jobs for college graduates in the food, agricultural, and natural resources system, you'll find just under half (46 percent) in management and business occupations.

Expect strong employment opportunities for:

- ▶ technical sales representatives
- ▶ food brokers
- ▶ accountants and financial managers
- ▶ forest products salespersons
- ▶ market analysts
- ▶ fruit and vegetable marketing representatives
- ▶ sales managers
- ▶ landscape managers
- ▶ small animal health care product distributors
- ▶ international business specialists

If you take a job in one of these areas, you will work in a sales, supervisory, or managerial position for an organization that adds value to agricultural and forest commodities.

You'll find opportunities for graduates in service professions including golf course superintendents, business consultants, insurance representatives, and human resources consultants. However, expect declining employment opportunities for sales and business representatives who provide production inputs to farmers and ranchers. As businesses continue to merge, you'll find fewer merchandisers of grains and food animals.

Colleges offering degrees in agriculture and natural resources are expected to produce 60 percent of the graduates who will compete for these positions.

We project that 40 percent of the qualified graduates will have degrees in allied fields such as marketing, business management, economics, advertising, accounting, and retailing.

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Agriculture Industry

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Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

Scientific and Engineering Occupations

Animal Physiologist

Biochemist

Bioprocess Engineer

Entomologist

Environmental Scientist

Fisheries Scientist

Food Engineer

Forest Scientist

Nanotechnologist Nutritionist

Plant Breeder

Quality Assurance Specialist

Research Technician

Resource Economist

Veterinarian

Scientific and Engineering Occupations

You can expect about 13,000 annual openings for new graduates, while about 12,700 qualified individuals will enter the job market each year – leaving a slight shortfall.

Scientists, engineers, veterinarians, and technical specialists likely will account for about 25 percent of all projected jobs for college graduates in the food, agricultural, and natural resources system.

You'll find most opportunities for graduates with skills in:

- ▶ precision agriculture
- ▶ functional genomics and bioinformatics
- ▶ forest science
- ▶ plant and animal breeding
- ▶ biomaterials engineering
- ▶ food quality assurance
- ▶ nanotechnology
- ▶ animal health and wellbeing
- ▶ nutraceuticals development
- ▶ environmental science

Scientists and technical specialists will find employment opportunities in both business and government research laboratories. In contrast, most engineers will work in industries. Veterinarians will likely specialize and join the growing number of group veterinary practices and animal hospitals. Changing U.S. population demographics will continue to open up opportunities for nutritionists and dietitians.

Expect relatively fewer opportunities for agricultural machinery engineers, wildlife scientists, and veterinarians in general practices. Also, you'll likely find limited openings for soil scientists, agricultural meteorologists, and range scientists.

Colleges offering programs in veterinary medicine and in agriculture and natural resources will graduate between 55-60 percent of the qualified applicants for these positions. Other prepared graduates will come from allied fields such as biological sciences, chemistry, mechanical engineering, chemical engineering, and health sciences.

Marketing Analysis

Background

Agriculture Industry

(Continued)

Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

Agricultural and Forestry Production Occupations

Animal Breeder

Aquaculturist

Equine Operator

Farm Manager

Farmer

Feedlot Manager

Forest Manager

Fruit and Vegetable Grower

Greenhouse Manager

Nursery Operator

Rancher

Seed Producer

Tree Farmer

Turf Producer

Viticulturist

Agricultural and Forestry Production Occupations

You can expect approximately 8,000 annual employment opportunities compared to 7,100 graduates with the required preparation. Overall, 16 percent of all new positions for college graduates with expertise in the food, agricultural, and natural resources system will be found in agricultural and forestry production.

You can expect good job opportunities as:

- ▶ producers of fruits and vegetables
- ▶ growers of specialty crops that provide raw materials for medical and energy products
- ▶ managers of specialized livestock operations
- ▶ forest managers
- ▶ growers of landscape plants and trees
- ▶ managers of aquaculture operations
- ▶ turf producers
- ▶ equine operators
- ▶ organic farmers
- ▶ providers of outdoor recreation

As in the past, most positions in this area are for farmers, ranchers, and herd managers. However, as agricultural production units continue to consolidate, you'll find fewer opportunities for producers of traditional commodities (e.g., wheat, corn, cotton, soybeans, cattle, and hogs).

Expect more opportunities for growers of specialty crops, fruits and vegetables, and landscape horticultural crops. Producers who can capture niches and who market products and services (including recreation) directly to consumers likely will find more opportunities.

Colleges of agriculture and natural resources will graduate about 90 percent of the qualified applicants for positions in agricultural and forestry production. Others will have degrees in allied fields including business, biological sciences, and applied technologies.

Marketing Analysis

Background

Agriculture Industry

(Continued)

Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

Education, Communication, and Governmental Services Occupations

Agricultural Science and Business Teacher

Agricultural Science Reporter

Conservation Officer

Cooperative Extension Educator

Environmental Impact Analyst

Farm and Ranch Advisor

Farm Service Agency Manager

Food Inspector

Forest Service Administrator

Land-Use Planner

Naturalist

Nutrition Counselor

Park Manager

Plant and Animal Inspector

Public Relations Specialist

Education, Communication, and Governmental Services Occupations

You'll find about 7,000 annual job openings in this occupational cluster, some 13 percent of all available positions in the nation's food, agricultural, and natural resources system. However, you can expect about 9,300 qualified graduates in this area each year.

Expect to find opportunities in:

- ▶ plant and animal inspection
- ▶ public health administration
- ▶ biotechnology impact assessment
- ▶ foods and nutrition services
- ▶ outdoor recreation
- ▶ food system security
- ▶ consumer information technologies
- ▶ environmental management
- ▶ high school agricultural science and business teaching
- ▶ land-use planning occupations

You'll find the largest number of opportunities in public service positions associated with maintaining our nation's food system security and environmental sustainability. Also, expect expanding opportunities in nutritional and health occupations geared to serve an aging population. You'll likely find opportunities for those qualified to teach high school agricultural science and business courses, to expand outdoor recreation opportunities (both public and private), and to facilitate land-use choices.

You can expect limited opportunities as agricultural communicators, farm and ranch advisors, and government farm service agents.

We expect colleges of agriculture and natural resources to graduate about 70 percent of the qualified applicants who will seek education, communication, and governmental services positions in the food, agricultural, and natural resources system. Other applicants will come from allied degree fields including foods and nutrition, communication, social services, public administration, biological sciences, and information technologies.

Marketing Analysis

Background

Agriculture Industry

(Continued)

Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

Major Factors Affecting the Market for Graduates

Many factors will affect the market for college graduates in the U.S. food, agricultural, and natural resources system during 2005-2010. We believe the most important ones are:

- ▶ Consumers and their preferences dictate that products and services derived from agricultural and forest raw materials must help maintain contemporary lifestyles. Population growth, changing ethnic and age demographics, and evolving food and health literacy strongly influence both what is produced and the expertise required to meet consumer demands.
- ▶ The evolving business structures that support the U.S. food system continue to be influenced by globalization and consolidation. Expertise needs will evolve and will create a need for graduates with excellent business skills, international understanding, and leadership qualities. Graduates must deal with increasing market uncertainty, risk analysis, petroleum dependence, niche business opportunities, and global food production and distribution systems.
- ▶ New developments in science and technology are being driven by changes in biosecurity, the expanding global population, health concerns, shrinking natural resources, and climate change. Emerging biotechnologies and nanotechnologies are powerful tools to increase food system efficiency. Other scientific developments help us maintain renewable natural resources. All of these require graduates with basic science skills and the ability to solve problems with scientific applications.
- ▶ Public policy choices and food system security affect the market for graduates who provide public services in education, natural resource management, food assistance, and recreation. Public concerns regarding diet and health, food safety, and the environment dictate the number and kinds of graduates needed to manage regulatory programs and provide services to assist producers and others working in the food and natural resources system.

Marketing Analysis

Background

Agriculture Industry

(Continued)

Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

Study Methodology

Available Graduates

The number of college graduates – baccalaureate degree and higher – deemed qualified for positions in the U.S. food, agricultural, and natural resources system was determined by using 2001-02 degrees conferred data from the Integrated Postsecondary Education Data System (IPEDS) surveys conducted by the National Center for Education Statistics (NCES) of the U.S. Department of Education. The NCES database includes postsecondary degrees conferred by all accredited public and private universities in the United States. Graduates are classified by degree level, degree specialization, and selected demographic characteristics.

- ▶ A panel of experts worked with the authors to select the NCES degree specializations from which graduates are qualified for occupations requiring food, agricultural, and natural resources expertise.
- ▶ Degree specializations were chosen not only from those usually offered by colleges of agriculture and life sciences, forestry, and veterinary medicine, but also allied fields offered by colleges of science, engineering, communication, business, health sciences, and others.
- ▶ The panel used historical graduate employment data, personal observations, and experiences to estimate the percent of qualified graduates by selected degree specializations and degree levels that are likely to enter occupations in the food, agricultural, and natural resources system.
- ▶ Non-U.S. citizen graduates, an estimated percentage of graduates who continue in educational programs, and an estimated percentage who do not seek employment were subtracted to determine the final pool of qualified graduates to enter the U.S. labor force.
- ▶ Qualified graduates in each degree specialization and degree level were assigned by the expert panel to one or more of the four occupational clusters. In most cases, total qualified graduates were apportioned among two or more occupational clusters.
- ▶ Graduate numbers were then aggregated in each of the four occupational clusters.

Employment Opportunities

Projected employment opportunities requiring college graduates with food, agricultural, and natural resources expertise were based upon data maintained by the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor (DOL). Occupational employment data for 2002 with projections to 2012 were published in the DOL Monthly Labor Review in February of 2004. Projected annual employment opportunities are reported for each occupation included in the BLS taxonomy.

- ▶ From the total list of BLS occupations, the panel of experts worked with the authors to select those that would be expected to require college graduates with food, agricultural and natural resources expertise.
- ▶ For each selected occupation, the panel assigned a percentage to the annual projected openings that were deemed to require college graduates with food, agricultural, and natural resources expertise.
- ▶ Adjusted annual openings in each selected occupation were assigned by the

Marketing Analysis

Background

Agriculture Industry

(Continued)

Employment Opportunities for College Graduates in the U.S. Food, and Natural Resources System

(Continued)

expert panel to one or more of the four occupational clusters. In most cases, the number of annual openings were apportioned among two or more occupational clusters.

- Employment opportunities were then summed in each of the four occupational clusters.

For more details about the study methodology and data used in producing this report, log on to <http://faeis.usda.gov/supplydemand/2005-2010/>. Click on “Technical Addendum.”

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More Information

This summary report is from a 2004 national study conducted under Cooperative Agreement 2004-38837-01875 between the Cooperative State Research, Education, and Extension Service of the U.S. Department of Agriculture and the Purdue University College of Agriculture.

You can find more information about this study and results at:

<http://faeis.usda.gov/supplydemand/2005-2010/>

Additional data regarding higher education programs in food, agricultural, and natural resources disciplines may be obtained at the following site: <http://faeis.usda.gov>

Marketing Analysis

Current Assessment

Audience(s)

Internal

- Board of Directors
- AFA Staff
- AFA Student Advisory Team
- AFA Alliance Planning Committee
- Community Coordinators
- Campus Champions
- Coalition Committee Members

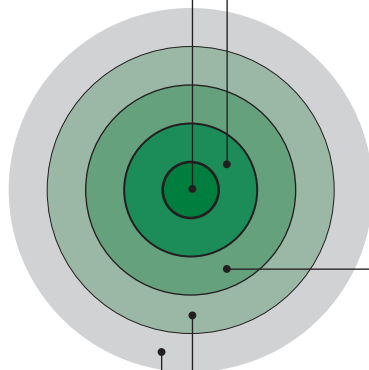
External

- College Students in Agriculture Studies
- College Faculty in Agriculture Departments
- College Ag Organizations (Alpha Zeta, Sigma Alpha)
- Scholarship Recipients
- Parents of Scholarship Recipients
- Current AFA Students
- Former AFA Students
- Current Alliance Members

- Community Partners/Donors (Scholarship)
- Corporate Partners (Internship, Opportunity Fair)
- Campus Partners (Universities/Colleges, Ag Departments)
- AFA Coalition (State Level)
- AFA Supporters/Sponsors
- Community Leaders/Volunteers
- Donors (Corporate/Personal/In-Kind)

- Industry Influencers in Agri-business, Agri-government and Agri-education
- Kansas City (City of KC, CVB)
- The Media (Industry, Educational, Community, Corporate, National, Local)

- Agriculture Industry (General)
- Communities Outside of AFA Scope (Beyond Regional Reach)
- Career/Guidance Counselors (High School)
- Ag Youth Organizations (4-H, FFA, ALOT, IALF, College Prep)
- General Public



Competitors

(for time, resources, opportunities, etc.)

National FFA Organization (FFA), State Leadership Organizations, Collegiate Organizations, Fraternities/ Sororities, Campus Activities, Other Student/Financial Obligations, Similar Philanthropic Efforts, Similar “Leadership” Organizations/Conferences/Seminars, Similar Scholarship Opportunities, Similar Funding Opportunities

Marketing Analysis

Current Assessment

Expectations

Of AFA

To be the source that attracts, refines and promotes leaders in the Agriculture industry.

To continually research, solicit and secure resources that support AFA's goals for program growth and expanded infrastructure.

To offer students superior/strategic training, mentoring and networking experiences that help them develop personal and professional competencies, gain self-confidence and demonstrate emotional intelligence.

To increase awareness of AFA and its growing service areas and continually manage the expectations of its brand.

To continually expand AFA's partner base to identify a new generation of leaders.

To support and utilize the Alliance through collaboration, deliberation, and inspiration while equipping them for innovation, reformation and reparation.

Of AFA Students

To believe in and devote themselves to the proliferation of the agriculture industry by contributing to, advocating and defending the issues, challenges, threats and policies shaping the future of agriculture.

To fulfill obligations, individually and as part of a team, while resisting the temptation to take "shortcuts" that might undermine the integrity of the final product.

To treat others with dignity and respect while putting forth their best effort, and trusting that all people do their jobs and fulfill their responsibilities.

To carry out responsibilities loyally, with a commitment to go a little further, endure a little longer, and look a little closer to see how he or she can add to the effort, without thought of personal recognition or gain.

To make integrity a matter of daily living by doing what's right, legally and morally, in everything they do.

To have the courage to face moral fear or adversity, especially if taking those actions is not popular with others, and by standing up for and acting upon the things that they know are honorable.

Marketing Analysis

Current Assessment

Expectations

(Continued)

Of AFA Partners

To identify and further develop outstanding young people that have leadership potential and a high level of interest in a career in the agriculture industry.

To annually invest in scholarships, intern opportunities, and leader training as young people graduate from high school and enroll in agriculture-related degree programs.

To provide practical experience and mentoring relationships as well as sponsor interns to the AFA Leaders Conference in the fall following the student's internship.

To be faithfully dedicated to providing students the attention needed to be successful in today's agricultural workforce.

To actively promote AFA's resources and services and offer other services to help students find jobs, internships and summer employment, while keeping students in high regard by industry recruiters.

To identify, advocate and provide funding and resources to support the brightest students in their respective state.

To assist with the promotion and advancement of the AFA mission and to direct and develop enthusiasm towards this effort, as well as to provide assistance when necessary to support it.

Marketing Analysis

Current Assessment

Strengths

- ▶ Fulfilling the (unmet) need for Agricultural leadership development
- ▶ Seamless incorporation with educational, experiential and industrial mechanisms
- ▶ Partners, Board of Directors, staff and students share integrity, passion, devotion and support
- ▶ Organization is discerning, receptive, adaptable and resilient
- ▶ Opportunities for both men and women
- ▶ Opportunity for life-long payoff (internal/external)
- ▶ AFA graduates are retained and revered
- ▶ Process is strategic, methodical and tactical
- ▶ AFA and members are nationally recognized and respected
- ▶ Significant value to students, communities, corporations and industry
- ▶ Continued annual growth

Limitations

- ▶ Weak, disassociated and diluted brand
- ▶ Identifier (logo) doesn't (adequately) represent brand (internally or externally)
- ▶ Limited marketing effort/strategy
- ▶ Limited promotional effort/strategy
- ▶ Limited staff/resources
- ▶ Limited (8 state) market
- ▶ Limited points of entry
- ▶ Limited retention strategy
- ▶ Limited "pay-off" strategy
- ▶ Sparse funding/resource base
- ▶ "Midwestern" organization stigma

Opportunities

- ▶ Solidify brand and promotional/marketing objectives
- ▶ Broaden community targets (beyond 8 states)
- ▶ Broaden Ag awareness
- ▶ Launch pilot subsidiaries
- ▶ Alliance pay-off (lobbying, grant writing, policy, fund-raising, promotion)
- ▶ 4-H, FFA partnerships
- ▶ Broaden resources (Sell books, workshops, retreats, seminars, online store)
- ▶ Publish in Ag Journals
- ▶ Corporate Partner opportunities (exhibits/workshops/seminars)
- ▶ Government underwriting
- ▶ Online opportunities
- ▶ National partnership opportunities (Ag Day, Campus promotions, farm shows, NAMA, Farm Broadcasters)

Threats

- ▶ General challenges associated with public perceptions, assessments, opinions, emotions, feelings and experiences related to the Agriculture industry
- ▶ Current economic challenges
- ▶ Cross-organizational services overlap
- ▶ Diversion in focus compromises reputation/expectations
- ▶ Economic/Environmental precedences
- ▶ Misguided/unexploited retention/return on AFA graduates

Marketing Analysis

Current Assessment

Marketing Efforts

General

- ▶ Collateral (Letterhead, Business Cards, etc.)
- ▶ Web Site
- ▶ Marketing Video/DVD
- ▶ Newsletter (3/year)
- ▶ AFA Talent Model
- ▶ General Proposal
- ▶ General PowerPoint Presentation
- ▶ Defining AFA Fact Sheet
- ▶ Exhibit Booth
- ▶ Exhibit Booth Rack Card
- ▶ Publication Ads (Successful Farming, Doanne)
- ▶ Logo Apparel
- ▶ Cookout Invitation
- ▶ Press Releases

Corporate

- ▶ Talent Development Proposal

Internship

- ▶ Intern Program Guide

Community Partners

- ▶ Community Partnership Brochure
- ▶ Community Partnership Agreement
- ▶ Community Partnership Poster
- ▶ Guide to Community Partnership
- ▶ Community Partner "Thank You" (Leave Behind)

Conference

- ▶ Pre-Conference Packet
- ▶ Opportunity Fair invitation
- ▶ Leader in Ag Award Dinner Invitation
- ▶ Conference Program/Annual Report
- ▶ Conference Attendee Item (Leave Behind)

Alliance

- ▶ Collateral (Letterhead, Business Cards, etc.)
- ▶ Alliance Member Invitation
- ▶ Alliance Brochure
- ▶ Alliance Forum Invitation
- ▶ Alliance Newsletter (monthly)

Marketing Strategy

Building the Brand

Core Values

| | |
|---------------------------|---|
| Talent | AFA attracts, refines and promotes assertive, self-motivated and principled leaders. Their fervent quest to effectuate self-actualization is triumphed only by their investment in those diversely gifted. |
| Passion | AFA and its affiliates share an intrinsic liability to the agriculture industry, attributed to their unparalleled devotion to traditional values and principles. Their unified allegiance is a benchmark that dynamically raises personal and industry standards. |
| Commitment | Integrity, accountability and adherence to a progressive expectation founded on mutual trust and respect are personified by AFA and its affiliates contributing to, advocating and defending the issues, challenges, threats and policies shaping the future of agriculture. |
| Intellectualism | AFA and its affiliates believe that improvement is a daily responsibility and excellence an attainable goal. Methodology, analysis and resolution is founded on substantiated, authoritative and unequivocal evidence through deliberate educational and experiential processes. To that end, the zealous journey never ceases. |
| Intrapreneurialism | Through synergistic collaboration, AFA and its affiliates motivate individuals to think with analytical valuation, and challenge colleagues to innovatively surmount limitations as a criterion for inimitable advancement. |
| Professionalism | AFA's dedication to implement relevant services, nurture industry relationships, empower exceptional authorities, and provide adaptable resources defines its role as a global catalyst and solidifies its reputation as an agricultural ambassador. |

Design Values

The following design values direct conceptual thinking and define criteria for evaluating the correct usage of the AFA brand:

| | |
|--------------------|---|
| Clarity | Hierarchy of information is clear. Designs clearly differentiate the AFA brand. |
| Simplicity | Designs are not complicated. Messages are focused. Layouts use space wisely and draw attention to the AFA identity. |
| Flexibility | Designs express the AFA brand consistently, yet creatively and distinctively. |
| Consistency | Communications are familial – with ties across internal and external audiences and to the brand. |

Marketing Strategy

Building the Brand

| | | |
|-------------------|-----------------|---|
| Identifier | Assessment | Has recognition; yet limited; tied to rural farming; doesn't reflect innovation/future or leadership |
| | Assessment | More representational of organization, members, expectations, and Brand Promise |
| | Conclusion | TBD |
| Competency Bar | Current | None; <i>The Leader Source</i> (proposed) |
| | Assessment | Needs to reflect Brand Promise |
| | Conclusion | TBD |
| Color(s) | Current | Green (PMS 343), Blue (PMS 280), Gold (PMS 131) |
| | Assessment | Has recognition; effective; needs to be consistent and reflect Brand Promise |
| | Conclusion | TBD |
| Typography | Current | Varied |
| | Assessment | Needs to be consistent |
| | Conclusion | Franklin Gothic Family |
| Imagery | Current | Varied, yet effective |
| | Assessment | Representational of organization, members, expectations, and Brand Promise |
| | Conclusion | |
| | AFA and Members | Professional, service-oriented, show authority/confidence, helpful, demonstrate passion/concern for agriculture, intelligent, capable, casual or business casual attire (dependent), caring, diligent, responsible, dedicated, conscientious, knowledgeable, thorough |
| | AFA Partners | Professional, employer, manager, agriculture-related worker, person in agriculture- or business-related "workplace" |
| | Environment | Professional, college/campus, workplace, job related, agriculture-, business- or industry-related, innovative, future |
| Overall AFA Brand | Current | N/A |
| | Assessment | Weak, unprofessional, disassociated and diluted |
| | Conclusion | TBD |

Marketing Strategy

Task List

Immediate Needs

- ▶ Determine Logo reformation
- ▶ Competency Bar creation/solidification
- ▶ Primary/secondary color consideration
- ▶ Develop Marketing Plan
- ▶ Develop Identity Guidelines
- ▶ Brand Marketing/Promotional Materials

Short Term Goals

Long Term Goals
