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THE BIVALVE BULLETIN

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As the Clam Turns: Industry Issues and Challenges in 2008

The impending economic recession is not only affecting clam farming but most all small businesses in the nation. Some practical advice on how to survive the latest economic downward cycle can be found on page 2 of this newsletter. For additional guidance and access to good resources, visit The Jim Moran Institute's website, www.cob.fsu.edu/jmi.

In a chain of cascading events, oil markets are having a direct impact on gas prices and trucking which is slowing commerce and food distribution as well as the tourist industry. These interrelated factors are resulting in less demand for luxury food items and reduced outings to restaurants. The "local" food movement, which was taking hold prior to this crisis, is changing consumer purchasing practices. It is time to capitalize on increased demand for fresh products to allow for marketing diversification and expansion. A promotional campaign is already in place with an appropriate slogan and logo—*Fresh from Florida*. Find out how to join the Florida Department of Agriculture and Consumer Services (DCAS) program on the next page. You'll also read about a certification program for cultured molluscs being developed by the World Wildlife Fund, which may result in market distinction on a global scale.

On the other side of the supply and demand equation is the increase in clam production in other parts of the U.S. Elsewhere in this newsletter is the latest production statistics from Virginia where clam sales topped \$27 million last year. There are several factors contributing to the growth of this industry. According to one

observer, these include a liberal leasing program with good growing locations, increased hatchery production, and nearby, readily available market outlets particularly in the Northeast.

This year I was invited to participate in the Washington Shellfish Growers 16th Annual Meeting. A report is provided on page 3 combined with an update on the state's Manila clam production, which is on the rise. The diverse Pacific Northwest shellfish industry continues to evolve as a result of grower ingenuity coupled with assistance from academic institutions, Sea Grant, and strong industry representation by the Pacific Coast Shellfish Growers Association. Their annual meeting allows for an informative exchange amongst these groups with presentations focused on industry needs. A similar meeting format was initiated last year for the Florida clam industry and will be continued this year. So mark your calendar for September 24th and plan to attend.

Other opportunities for Florida clam growers to address industry issues include participation in an electronic discussion group (page 5) or in the Statewide Clam Industry Task Force meetings (page 6). Quarterly meetings are held in different parts of the state to allow for grower involvement. You can also keep informed through your industry representative(s). At their last meeting in March the Task Force expressed concerns about the lack of current production statistics for Florida. As a result, DACS and the University of Florida are conducting a study to capture the economic impact of cultured clam sales in 2007 (page 5).

World Wildlife Fund's Mollusc Aquaculture Dialogues Continue with Industry Input

Protecting endangered wildlife, preserving wild lands, and addressing global threats and challenges is the mission of the world's largest conservation organization, the World Wildlife Fund (WWF). In the early 1990s, the WWF began spearheading the creation of certification programs for fisheries (Marine Stewardship Council), forestry (Forestry Stewardship Council), agriculture (Protected Harvest), and other industries. These programs are based on standards which address and resolve environmental and social impacts. Now a similar program is being created for aquaculture (see the January 2008 issue of *The Bivalve Bulletin* for more introductory information) with an initial focus on molluscs. The process used by WWF for developing certification programs includes dialogues with farmers, buyers, nonprofit organizations, and others. Since October, WWF has held regional dialogues in Oregon, North Carolina, Florida and Rhode Island for shellfish growers to provide feedback on proposed standards for clams, oysters, and mussels. At the Orlando meeting this past February, 12 Florida clam industry members and 4 agency representatives participated. —Continued on Page 4



Recession is Coming: Adapt to Survive by Dr. Jerry Osteryoung, Jim Moran Institute of Global Entrepreneurship

When someone says that the free market isn't working, what he means is that he doesn't like the way the free market is working. ~Nicolas Martin

As most things in life are cyclical, our economy is in the process of going through a downward cycle. I am seeing evidence of this starting to happen in many types of businesses, not just in housing. Automotive sales are off as well, and even many thrift stores are seeing declining revenues from potential customers. This recession is starting to affect all income levels, and many entrepreneurs are starting to feel the effects of this right now. Furthermore, when the state of Florida starts its personnel cutbacks to account for the deficit in the state budget, local economies and entrepreneurs are going to undergo the effects even more dramatically.

With a recession coming and already underway, you must have a way to deal with declining sales. I like to tell entrepreneurs that they must have a plan to withstand a fall in sales of 30 to 40 percent. Hopefully this will not occur, but just in case, a plan must be in place for this year. Time and time again I have seen businesses make the mistake of waiting too long to cut back in the face of falling sales. They spend too much time hoping things will improve. This is a very costly error and can risk the financial viability of the business. The sooner you cut back, the better! In terms of cutting costs, you need to evaluate labor, communications, insurance and all costs. Nothing should be sacrosanct as you look for ways to reduce costs. However, it is not a good idea to cut advertising, as this activity is critical for your continued existence.

"Fresh from Florida" Promotional Program and Clam Marketing Activities

A promotional program designed to boost the image of Florida agriculture and increase sales has been conducted by the Florida Department of Agriculture and Consumer Services (DACS) since 1990. The Florida Agricultural Promotional Campaign (FAPC), better known as "Fresh from Florida," helps consumers and potential buyers easily recognize Florida grown and produced agricultural products. Those participating in the program use a distinctive logo for product identification. There is even an individual logo for farm-raised clams! The DACS Bureau of Seafood and Aquaculture Marketing invites Florida clam producers and suppliers to become part of the program and start enjoying the benefits immediately. The annual membership fee for an aquaculture producer or wholesaler is \$50. Benefits include:

- Receive "Fresh from Florida" promotional materials to offer your customers (brochures, posters, and other point of purchase items).
- Authorized to use "Fresh from Florida" logos in advertising, promotional materials, packaging and vehicles.
- Receive opportunities to participate in statewide, regional and national marketing campaigns and trade events.
- Receive *sEaNotes*, an email newsletter produced by the Bureau addressing current industry events and activities.
- Opportunity to utilize incentive monies to promote your business and Florida seafood.

Like most things, cutting costs is a very traumatic process. However, you must do it, and it must be done before it is too late to recover from the financial impact. I have assisted many firms that are going through this process, and each has a hard time, especially when it comes to laying off workers. However, without exception, they come out of the economic decline saying that cutting costs not only helped them get through the rough times, but it also allowed them to flourish in the future. To further adapt, you must be able to recognize any changes in the market. Many firms either do not see what is happening or refuse to see it. Many owners believe that new competition can not be sustained, but they also believe that their way of doing business is the correct way. Stubbornness prevents many owners from recognizing changes and acting on what they see. The market punishes those firms that are not fit (the law of natural selection). You must first recognize that market conditions are changing, and then you must adapt. Those firms that can continually adapt to changing conditions are the ones that will survive.

Now go out and make sure you have made a plan for dealing with the impending recession, as well as identify the triggering events that will put your recession plan in place. In addition, make sure that you are aware of changing trends in your industry and market. With this awareness, you can devise a plan to adapt. You can do this!

And while the law of competition may be sometimes hard for the individual, it is best for the race, because it ensures survival of the fittest in every department. ~Andrew Carnegie

- Notification of grant opportunities that businesses are eligible to apply.
- Receive Trade Leads as they occur from potential buyers.

Join now and take advantage of the many benefits and services that FAPC membership has to offer. To obtain an application, call the Bureau at (850) 488-0163 or visit the website, www.FL-Seafood.com, click on the "Info for Industry" icon on left and select FAPC.

The Bureau of Seafood and Aquaculture Marketing has also been busy implementing some ideas discussed at recent Industry Task Force meetings to help increase sales of farm-raised clams. Marketing activities conducted in May follow:

- Florida clams were featured during the Monterey Bay Aquarium's 2008 Cooking for Solutions gala, where chefs around the world shared their passion for environmentally sustainable living. Brochures and media briefing information were developed by the Bureau for distribution. These promotional materials can be used by clam suppliers and modified to include contact information.
- Florida clams were served at 30 Sweet Bay (a regional grocery chain) locations, primarily in the Tampa Bay area, during a 6-hour demonstration period.



RESEARCH UPDATE: West Coast Shellfish Growers Meeting

Washington state is the top producer of farmed shellfish in the U.S., and many consider its production to be the most technologically advanced in the world. Dating back to the late 1800s, the industry focused originally on oyster culture, first by collecting spat of native oysters and later by bringing in Pacific oyster seed from Japan. In need of a more dependable source of seed, hatchery technology evolved in the 1970s. With the advent of commercial hatcheries, came the ability to produce seed for a variety of specialty oysters, including the European flat, Eastern oyster, native Olympia oyster and Kumamotos, and eventually other shellfish species, such as Manila clams (see article on this page), Mediterranean mussels and more recently, geoduck clams. Focus has also been on producing improved stocks and sterile animals which are hardier, grow faster, and expand market opportunities. Besides being diverse in types of species cultured, the west coast industry employs a variety of culture systems depending on the species, desired product form, or the physical environment being cultivated. Geographic diversification is another strategy the industry has employed as growing shellfish in a variety of estuaries has allowed for consistent product availability. To keep the industry informed about the latest technological developments and foster exchange of information among growers, Washington Sea Grant began hosting annual meetings in 1992.

This past March, I participated in the 16th Conference for Shellfish Growers held in Shelton, Washington during which I presented an overview of the Florida clam industry. The first day's meeting agenda allowed for reports on recent advances in shellfish culture. Oregon State University researchers reported on the Molluscan Broodstock Program. Selected broodstock has improved Pacific oyster yield by three-fold. Selection trials are ongoing for meat color, shell shape and color to create "boutique" oysters for premium markets. A USDA Rural Development representative spoke about value-added agriculture and the agency's assistance in marketing development. For example, a producers grant program provides assistance for new market ventures, brand marketing or packaging (for more info, go to www.rurdev.usda.gov). Staff from the Washington Department of Health presented new shellfish protection requirements and discussed emergency closures. Microbacteriological management in shellfish growing areas was another topic as the incidence of *Vibrio paraheamolyticus* in water, plankton, and oysters has increased with increasing water temperatures. University of Washington faculty spoke about effects of global climate change and how that may influence distribution of human pathogens in shellfish.

The second day of the Shellfish Growers Meeting is typically devoted to topics nominated by industry. This year the focus was on shellfish seed supply as the re-emergence of vibriosis caused by a specific pathogen *Vibrio tubiashii* has severely affected west coast hatchery production. Techniques to mitigate the effects of this disease outbreak were presented. One approach was through enhanced seawater treatment. For example, it was recommended that recirculating filtration systems be used for hatchery water supplies. Incorporating additional filtration, such as bioreactors and protein skimmers, to remove bacterial toxins was also suggested. Ralph Elston of Aqua-Technics spoke about the challenges in understanding the nature of these infections and developing a multifaceted management approach to interrupt the cycle of bacterial amplification in the hatchery. Dr. Elston will be a guest speaker at our Florida growers meeting to be held this September (see page 6 for details). A grower from Hog Island Oyster Company spoke about strategies for the farm and how to catch up with the losses (ie. seasonal plantings, remote setting). An agency representative also spoke about shellfish import permits as more seed is coming into the state from other locales. The meeting ended with a report from an industry seed committee, a roundtable discussion, and, of course, a reception featuring farm-raised shellfish.

Clam-at-a-Glance: MANILA CLAM

Scientific Name: *Tapes philippinarum*

Other Common Names: Japanese Carpet Shell, Japanese Littleneck Clam

Behind the Shell: The Manila clam is native to Asia. Shellfish growers in the Pacific Northwest began noticing Manilas in the 1940s. The clams are believed to have arrived in U.S. waters on ships carrying oyster seed from Japan during the 1920-30s. Manila clams survive well in a variety of bottom types along Washington's beaches—gravel, sand, mud and shell—and are usually found growing in the mid-intertidal regions between 3 and 6 feet above mean low tide. Established populations of Manila clams exist in Washington throughout portions of Puget Sound as well as Hood Canal¹.

Cultivation Practices: For years Manilas were harvested from wild stock along the Washington shoreline. It quickly became apparent to growers, such as Peter Becker, Little Skookum Shellfish Growers, that recruitment from wild populations would not sustain harvest levels¹. Technology for producing sufficient clam seed was developed in the late 1970s. By the 1980s, technology for modifying beach substrates and culturing clams in bags would stretch the range of areas in which Manila clam cultivation could take place. Because of the need for stable sediment, the Manila clam is harvested primarily from protected low-energy beaches. Two methods of cultivation are employed. One involves seeding an open area along the intertidal habitat, covering the area with predator netting, and harvesting clams once they are marketable size. The other, more recently developed, method involves putting clams in mesh bags and securing the bags to the bottom. This method, also common in east coast clam farming, is often employed in areas where heavier predation from crabs is problematic¹.

A Glimpse of the Industry: Manilas are generally sorted into three size classes at harvest: small (25-35/lb), medium (15-24/lb), or large (8-14/lb)². —Continued next page



Manila Clam Production (continued)

A longer shelf life (10 days in winter, 3-5 days in summer), and a meat-to-shell ratio of 20-25% has led to the Manila clam's dominance of west coast clam harvests and translated to annual production of over 5 million pounds for larger growers like Taylor Shellfish³. In 2005, Manila clam harvests in Washington totaled 8.5 million pounds accounting for almost all of the production on the west coast. Overall, the harvest of Manila clams is estimated to generate between \$15-20 million annually for the state's economy; whereas the shellfish aquaculture industry as a whole on the west coast is estimated to generate around \$110 million annually⁴.

Sources of Information: ¹*Fish Farming News*, Issue 4, 2006; ²Taylor Shellfish, www.taylorshellfishfarms.com;

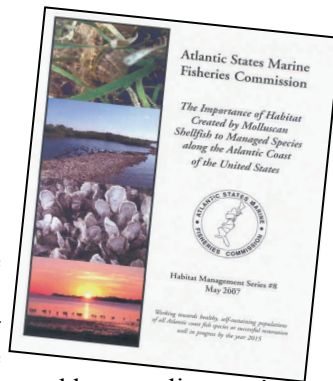
³*Seafood Business* Vol. 27, No. 4, 2008;

⁴Pacific Coast Shellfish, www.pcsqa.org

New Publication Documents Importance of Molluscan Shellfish Habitat

The Atlantic States Marine Fisheries Commission is a U.S. coastal management authority for over 26 species ranging from Maine to Florida. Commission committees address policy and develop informational documents for guidance in the conservation, exploitation and habitat protection of fishery populations. A recent publication, *The Importance of Habitat Created by Molluscan Shellfish to Managed Species along the Atlantic Coast of the United States*, describes shellfish habitats and their varied ecological value, categorized by reef-forming species, aggregations of living shellfish, shell hash communities, and ecosystem services provided to various fish life stages. The status of environmental conditions for over 10 molluscan species and relationships to recruitment/growth success of 20+ marine and estuarine fish species is presented. The aspects of shellfish aquaculture, with increased seabed utilization, are to be analyzed for contribution of niche habitat and 3-D structure enhancement in coastal waters. Electronic access to this document can be obtained at <http://www.ASMFC.org>, click on "Publications," then at the top of the page click on "Habitat Documents."

Source: *The Dredge* Newsletter, Winter 2007/8, Connecticut Sea Grant



WWF Mollusc Dialogues (continued)

Initial questions asked by participants were: why was WWF interested in mollusc culture since the industry is already committed to protecting water quality; wasn't this duplication of existing best management practices already being implemented in the state; what would it cost for certification; and, who would do the certification. WWF organizers addressed the majority of questions by stating this will be a voluntary program intended to provide an extra benefit to growers. They also emphasized that industry will be involved in developing the standards. It was explained that the standards would be passed off to an independent third-party certifying body when developed with a suggested fee of around \$500. Since the focus of the meeting was to get industry input on the draft principles, the WWF organizers moved into break-out sessions so smaller groups could discuss these and begin to make headway on the creation of criteria and indicators.

The following eight principals had been drafted at previous dialogues: 1) Obey the law and comply with all national and local regulations, 2) Conserve natural habitat and local biodiversity, 3) Protect the health and genetic integrity of wild populations, 4) Manage disease and pests in an environmentally responsible manner, 5) Use resources efficiently, 6) Be a good neighbor and conscientious coastal citizen, 7) Continually improve practices over time, and 8) Develop and operate farms in a socially responsible manner. For each principle, specific criteria, indicators and measureable standards must be developed. Many of the principles are straight forward, such as 1, 5, 6, 7 and 8, and should not be difficult to document and implement. However, several, such as Principle 2, are complex with either unpractical or indefinable measures. Although some progress was made on the standards at the Orlando meeting, there was still an atmosphere of skepticism about the process.

Similar sentiments were expressed by shellfish growers at the Rhode Island dialogue conducted in April. Once again, concerns were raised about adding what seemed to be another layer of bureaucracy to farmers who are already stretched thin. Questions were raised about the possibility of a price premium. These were addressed by someone with experience in the Marine Stewardship Council certification program. The response was it probably was wrong to assume an eco-label would definitely get a premium price, but it will get better market access. At this meeting, focus was placed on Principle 2 with measureables discussed for carrying capacity and benthic (bottom) effects, such as shellfish growth rates, off-season dissolved oxygen levels, and even periodic video or photo records. WWF organizers seemed to be more accepting that standards must be kept simple and practical so they could be adopted by farmers.

According to WWF, the next step is to meet once more with the U.S. shellfish industry, most likely at a west coast location. Expectations are that standards will be fully developed by year's end, followed by field testing. WWF is also moving forward in setting up dialogues with shellfish growers in other countries, New Zealand and France. For more info, visit <http://www.worldwildlife.org/aquadialogues>.

USDA Farm Service Agency: New NAP Provision

The USDA Farm Service Agency (FSA) is now requiring all producers with value loss crops, which include cultured clams, eligible for the Noninsured Crop Disaster Program, or NAP, to maintain monthly inventories. Monthly inventory numbers will be used for spot checks, if needed, and in the event of a disaster occurrence. Records are to be kept up-to-date and readily available upon request. Clam inventories should be broken out by numbers, such as the number of bags and number of clams in each bag, for each lease site. This new provision is effective immediately. Lack of monthly reports could make a producer ineligible for NAP benefits. For more information, contact your county FSA office.

Are You Connected? Sign up today for the **FLORIDA CLAM CULTURE INDUSTRY FORUM** an electronic mailing list and online discussion group.

More and more people use electronic mail as a convenient, easy and fast way to communicate with individuals as well as groups. The purpose of the CLAM-L mailing list is to promote timely discussion among industry members and individuals interested in the business, technology, and science of clam culture in Florida. It is hoped that this electronic forum will provide an avenue for rapid exchange of ideas, information, and advice. Posts on subjects related to shellfish culture, market information, etc. are welcomed. It's free to join, so follow the easy directions below.



Potential topics include:

- Farming problems and solutions
- Equipment and gear for sale
- New culture methods or suppliers
- Conditions at clam lease areas
- Seed availability from suppliers

Keep informed on:

- Industry updates, such as harvest closures
- Upcoming meetings and workshops
- New research results or publications
- Receive electronic newsletters
- Current and upcoming issues

To join the CLAM-L group: Send an email message once to this address: LISTSERV@LISTS.UFL.EDU Leave the subject field blank. In the body of the text, type the following: SUBSCRIBE CLAM-L

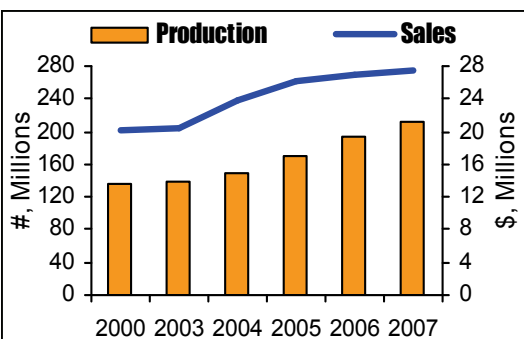
To send a message to the CLAM-L discussion group:

Send it to the following email address (not the address above): CLAM-L@LISTS.UFL.EDU

Remember when you reply to a CLAM-L message, it goes to everyone on the mailing list. For personal replies that should be sent directly to the original sender, remove the CLAM-L address from the recipient's list and replace with their personal email address. Unrelated materials should be kept to yourself. If you have questions about the list, send a message to the list owner, Shirley Baker, UF/IFAS Department of Fisheries, at her email address, sbaker25@ufl.edu.

Virginia's Clam Production Steadily Increases

Results of the 2005 USDA Census of Aquaculture revealed that Virginia led the nation in clam production. In that year, 38 farms reported total sales of 170 million clams for a value of \$26 million (see the November 2006 issue of *The Bivalve Bulletin*). Recent reports by the Virginia Institute of Marine Sciences indicate that clam production continues to expand in the state. The reports are based on findings from mail surveys conducted in 2006-7 during which growers reported a significant increase in seed plantings compared to 2005. The outlook for 2008 suggests a likelihood of a further increase of 5-10%. During 2006 it was estimated that Virginia had a total farm output of 194.4 million market clams with an average price reported per clam at the farm gate (dock side) of \$0.14, essentially the same level as the previous year. In 2007, farm output rose by 9% to an estimated 211.9 million clams with the average price per clam dropping to \$0.13. According to growers, over 90% of all market clams grown in Virginia continued to be shipped to out-of-state buyers.

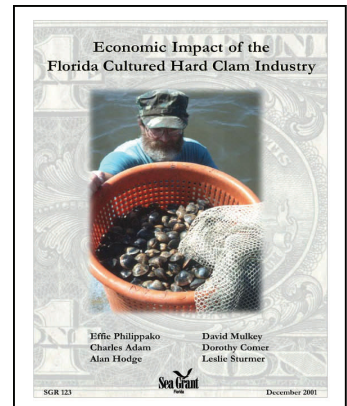


Perhaps significant for the future of Virginia is the estimated 46% growth in seed production and expansion of the industry's hatchery infrastructure.

Economic Impact of FL Clam Farming Industry

The clam farming industry is an important component of Florida's aquaculture and seafood businesses. Continued growth requires support such as reasonable water quality standards, favorable permitting and regulatory measures, and effective marketing efforts. To ensure the industry receives the support it deserves, state and local decision-makers need to understand the importance of clam sales to the state's economy. The last time an economic analysis was performed was in 1999. The study, conducted by University of Florida, determined the total impact of clam sales was \$33.9 million. These results have been used by industry on numerous occasions. If you would like to review the complete report, go to <http://shellfish.ifas.ufl.edu>, click on Pubs and Tools.

The Statewide Clam Industry Task Force recently requested that current contributions of cultured clam sales be documented. In April, surveys were sent to 52 certified shellfish wholesalers in the state who handled cultured clams in 2007. The responses provided will be averaged with everyone else's, so that each firm's input remains anonymous. The information collected will be used to document the impact of the industry to local communities and to the state. It is important that shellfish wholesalers take the time to complete the survey.





Statewide Clam Industry Task Force Meetings

Wednesday, June 11, 1:00–3:00 PM
Captain Hiram’s Resort, 1580 US Highway 1
Sebastian

Wednesday, September 24, 10:30 AM–1:00 PM
Community Center, 809 6th Street
Cedar Key

The summer and fall meetings of the Clam Industry Task Force have been scheduled. Agenda items for these meetings are submitted by task force members to the Department of Agriculture and Consumer Services, Division of Aquaculture (Phone: 850-488-4033). Industry members are welcomed to attend. If you cannot, stay informed through your regional representative.

Annual Clam Growers Workshop

Wednesday, September 24, 1:30–5:00 PM
Community Center, Cedar Key

Updates on applied research projects will be provided by faculty from University of Florida, Harbor Branch Oceanographic Institute, Florida Gulf Coast University and others. Topics include stock improvement through hybridization, clam health assessment, water quality monitoring, sunray venus culture potential, and soils assessment of clam leases. A feedback session and social will allow for interaction between industry and researchers. More information to follow.

5th Annual CLAMerica Celebration

Friday, July 4, 10 AM–6:00 PM
City Park, 2nd Street, Cedar Key

Sponsored by the Cedar Key Aquaculture Association, this festival celebrates the area’s clam farming industry, as well as the country’s birthday. Farm-raised clams are featured on the menu and served in a variety of way—steamed, on-the-half-shell, fried, chowder, and fritters. For landlubbers, there will be hamburgers, hot dogs, corn-on-the-cob, watermelon, root beer floats, ice cream, and more. The festival will open with a children’s bicycle parade and flag raising ceremony. CLAMania events will be held throughout the day – all of which are free. Prizes abound for clam bag races, a clam harvest-hunt, clam raceways, guess the clam count, clam lease (greased) pole, and a host of other children’s activities. Other featured events are a Sand ‘n Shell Sculpturing contest, Kayak Free-for-All, and golf cart parade. The 5th Annual Cultured Clam Cook-off will showcase a variety of clam recipes including local favorites, along with clam cooking and shucking demonstrations. A new event is the Clam Chowder Challenge for restaurateurs. There’s also clam farming exhibits and tours. Continuous live music in the park will be provided. At dusk, the City will host the fireworks display. CLAMerica Celebration was selected as one of the Southeastern Tourism Society’s Top 20 Events for the month of July 2008! Visit www.cedarkey.org for more information.

Next Clam Industry Task Force Meeting is set for June 11 in Sebastian. Plan to attend! See page 6 for details.

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This newsletter is published through the University of Florida Cooperative Extension Service. For more information, contact

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