

YEAR IN REVIEW

By Jennifer Fleming, CSF Executive Director

“It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change” – Charles Darwin.

Since taking the position of Executive Director of the Canadian Sheep Federation (CSF) in March 2004, it feels like there has been an overwhelming push to implement programs that will change the way producers do business. Primarily, these programs have been developed to keep producers in business in the event of a foreign animal disease outbreak; ensuring the long-term viability of the livestock industries in Canada.

This all sounds fine and good, except for the fact that people inherently resist change - especially when they do not feel as though they have had any say in it or control over the situation. This is one of the most important reasons why CSF spends a large portion of its time and money lobbying both the government and other commodity groups. By consistently keeping people up-to-date on the issues facing the sheep industry, we can influence the changes that are occurring. The ultimate goal, of course, is minimizing the effects of changes on-farm— in terms of both producer time and money.

It is the responsibility of the CSF to have programs available for producers to facilitate this process. It is for this reason that the CSF has worked to make changes to the Canadian Sheep ID Program, developed the *Food Safe Farm Practices* Program and is currently working on a Market Development Strategy.

Florence Henning’s article gives a great overview of what the CSF has been working on in this regard over the past 12 months. Our efforts have been widespread covering everything from traceability to marketing. In attempt to streamline these efforts and make the Federation more efficient, we are also going through some changes related to the development of a Business Plan. With input from various stakeholders throughout the sheep industry, the result will be a three year Business Plan which will lay out the priorities for the Federation. This plan will become the standards by which the CSF evaluates its successes and challenges each year and will help CSF better serve producers.

This coming year will also see some changes on our Board as we bid farewell to two long-serving members. Fred Baker and John Hemsted, both from the Ontario Sheep Marketing Agency, have announced that they will be stepping down. While we wish them well, their insight and dedication to the industry will be surely missed.

In this Issue

Year in Review	1
From the Chair	2
Food Safety	3
Animal Care	4-5
Quality Based Pricing	6-7
Beneficial Management Practices	9-10

From the Chair

By Florence Henning, Chair CSF

It has been both an exciting and challenging year as Chair of the CSF. One of the challenges I found is balancing being involved in both the provincial and national aspects of our industry. Both are extremely important and each needs to compliment the other, while striving for similar goals.

I have been very fortunate that both my MP Rob Merrifield and Alberta Agriculture Minister Doug Horner have been accessible and have shown a commitment to lobby on behalf of the sheep industry. Effective lobbying both provincially and nationally has enabled our industry to be included in meetings with the Minister Strahl, the Canadian Food Inspection Agency and to open the dialogue so that we can work to create a sheep-value chain meeting with Michael Presley, Director General, Food Value Chain Bureau.

It is imperative that these lobbying efforts continue and that we continue to expand communication with all levels of government and our national sheep organizations. As part of this increase in communication, regular teleconferences with the Canadian Sheep Breeders Association (CSBA), the Canadian Cooperative Wool Growers (CCWG) and the Canadian Livestock Genetics Association (CLGA) and the CSF, have gone a long way to ensuring that the sheep industry has a unified voice.

The Minister's wine and cheese reception in St. John's Newfoundland in June was an excellent opportunity for us all as the CSF Board to be involved in a successful lobbying and also to promote and encourage leadership and support from the Ministers for initiatives we deem as high priorities for our industry.

I had the opportunity to go the American Sheep Industry meeting in Arizona and also attend the first meeting of the North American Sheep Coalition in Queretaro Mexico. There are many production similarities between the three countries, mainly market access, price, disease control and surveillance, and the prohibitive cost of RFID traceability. I have extended an invitation for our next NASC meeting to be in Canada in 2007 and the CSF is looking forward to strengthening our co-operation between both the US and Mexico.

One of the highlights this past year has to be the posting of the small ruminant import regulations for comment. I am optimistic that imports of live animals can begin in the Spring 2007. The availability of new sheep genetics will bolster and benefit the purebred sheep sector and subsequently the entire sheep industry.

The changing of the Bluetongue import regulations has the CSF in negotiations with the CCA regarding the formation of an indemnity fund for producers. As the health status of Canada's sheep industry has a direct impact on the industry's current and future access to domestic and international markets we continue to discuss the need for long-term surveillance for BT and scrapie. The market development strategy is another exciting highlight of 2006. The results will further the viability and aid expansion of our industry. I look forward to its completion.

The future of our industry is boundless and I am enthusiastic that the CSF will continue to work to further the sheep industry as a vital part of Canadian agriculture. I would like to thank the Board for their time and input over this past year and also thanks to both Jennifer and France for their continued hard work and dedication to our industry. The Canadian sheep industry is forward thinking, progressive and has enormous potential I urge every to continue to raise the profile of our industry and continue to work to guarantee the success of all our accomplishments

On-Farm Food Safety: Year-End Review

By France Lanthier, National OFFS Coordinator

Last year's AGM brought together a new coordinator, a few members of the original OFFS committee, and many new recruits. To add to the mix, we entered a new phase of program development. After 7 years of producer manual development, this new group was presented with the seemingly onerous task of developing a management system which seemed to involve numerous levels of administration and costs we could not even start to estimate. Needless to say many, including myself, could not see the forest for the trees.

Since last November, the members of the technical committee have done a phenomenal job of familiarizing themselves with program requirements, while the CSF Board and provincial producer organizations have committed human resources to assist with the development of the program. For my part, I have had the opportunity to meet with producers across Canada to provide information and training sessions for the OFFS program.

In June the committee had the opportunity to meet in St. John's. During this meeting committee members were put into task groups in order to make the process of reviewing and developing the program more efficient.

Since June the management system has been drafted and is currently being reviewed by CFIA to assess its technical soundness (to see if it meets the government requirements). The technical committee will be reviewing the system, which includes producer registration, on-farm audit, and ongoing conformance procedures, to make sure that the program is producer friendly, affordable, and credible.

With procedures in place, our tasks for the coming year are clearly defined:

- Continue to provide program information and training for producers. Producer sessions for the Canadian Sheep and Lamb Food-Safe Farm Practices program must now be funded through the On-Farm Implementation (OFI) program. In order to access this funding, education plans outlining the resources required and the number of participants attending the sessions must be provided. While the National Coordinator is available to run sessions, provincial trainers may be needed depending on demand. To assess the training needs, a letter of interest will be sent to all producers through provincial organizations, after which the need for trainers will be known and train-the-trainer sessions will be planned need be.
- Establish and agree upon an audit frequency. In the absence of market or government pressures to implement the program, the cost and frequency of audits are the major factors causing reluctance in terms of producer participation. So far the Federal and most of the Provincial governments have been firm in their position to not assume the costs of audits. We are left with the task of developing a system that is rigorous enough to assure compliance, but that remains affordable for producers who wish to participate. This activity will also include training auditors who can provide the auditing services.
- Provide tools to facilitate OFFS implementation. While the Canadian Sheep and Lamb Food-Safe Farm Practices program is designed to accommodate individual operations, the record keeping requirements and certain practices will be common to all. The technical committee is currently developing producer friendly record keeping tools such as records in the format of a pocket book, and are also developing fact sheets intended to cover standard operating procedures such as injection techniques.

While many challenges lie ahead, we are now at a point where producer concerns are well understood, program requirements are well grasped, and a strong working group has been formed. With a year under our belts I am confident that we will move forth with focus, and of course common sense.

Animal Care: Year in Review

By Monica Séguin, Animal Care Representative

Globally, animal care is an important concern for consumers and producers. Until recently Canada has never had an official organization, with a diverse membership, whose sole purpose is to focus on animal care issues in food producing animals. As global pressures increase in the field of animal welfare, there was a need to develop an organization that could represent animal care at a national level and facilitate the future development/revision of the Codes of Practice and/or auditable animal welfare programs. The formation of the National Farm Animal Care Council (NFACC) is an achievement that all livestock industries should be proud of.

Briefly, the NFACC council is made up of representatives from all major livestock industries (i.e. beef, dairy, poultry, swine, sheep), scientists, provincial farm animal care groups, veterinarians and other parties (i.e. from the transportation and retail industry, the humane society as well as provincial and federal government representatives).



NFACC was created for several reasons:

- To provide a discussion forum for Canadian livestock organizations.
- To act as a group to filter information regarding animal care to the federal government (as animal welfare has been one of the main topics of discussion in the international field) as well as to industry groups.
- To facilitate the development and revision of the Codes of Practice.



The Codes of Practice were intended to provide producers with a starting point for how to house and care for their animals. They are generally quite broad as there are no two farms that are alike, but they cover topics such as housing density, food/water availability, transportation, processing, euthanasia and husbandry practices (i.e. castration, tail-docking). The Codes of Practice for the Care of Sheep was published in 1995. Unfortunately, the document is difficult for producers to apply in practice and it is no longer available in print.

The main focus of NFACC at this point is to provide support and facilitate the review of the Codes of Practice for livestock industries. Since its inception just over a year ago, NFACC has made some significant advances in this regard. A subcommittee was formed to review the current status of the use of the Codes of Practice in Canada. The committee developed a report highlighting the strengths and weaknesses of the Codes (i.e. ambiguous wording should be avoided) and identified components that are needed when reviewing the Codes (i.e. consultation with scientists and humane society).

ANIMAL CARE CONTINUED ...

The next step is to have livestock groups go through the process of reviewing and updating their Codes. Different groups are at different stages depending on when their codes were published last. For example the poultry codes are more recent (2003) whereas the dairy codes are over 15 years old.



Raising any food producing animal does not only mean that they need to have food and water available for them. It requires knowledge about their foraging and social behaviour, their social structure, the species-specific parental and mating behaviour, and their means of communication with one another (i.e. sight or smell) just to name a few.

From this knowledge one can determine if a particular situation (i.e. housing arrangement or management procedure) would be detrimental or beneficial for animal welfare. The new Codes of Practice should incorporate science based knowledge regarding these and other topics but should strike a balance with what is practically feasible to implement on farm.

This next year should be a fruitful one as NFACC pushes forward as the national voice for animal care in Canada.

BLUETONGUE OUTBREAK PROMPT NEW MEASURES

The European Commission has extended the bluetongue restriction zone in Europe, because of further cases of the virus.

Further cases of bluetongue virus have prompted the European Commission to extend the restriction zone. The commission is also to revise certain measures with regard to the movement of animals from the protection zones around the outbreaks. Under this action, the restriction zone is extended to cover all of Rhineland Palatinate and more areas in Lower Saxony, due to further bluetongue outbreaks in Germany. The restriction zone has also been expanded to cover more areas in North-West France due to new cases of the disease in Belgium, close to the French border. In addition, the commission has decided to slightly adapt the restrictions on the movement of ruminants in order to reduce unnecessary burdens on farmers in these areas, and to reflect certain animal health and welfare considerations.

The commission said it is monitoring the bluetongue situation very closely, and measures will continue to be revised if necessary in light of any developments or further spread of the disease.

Since the first case of bluetongue was reported in Northern Europe in mid-August, there have been around 650 outbreaks in total across the Netherlands, Belgium, Germany and France. The latest decision was endorsed by the Standing Committee on the Food Chain and Animal Health in mid-September.

Source: <http://www.meatnews.com/index.cfm?fuseaction=Article&artNum=12655>

QUALITY BASED PRICING — PAYING MORE CAN ACTUALLY LOWER YOUR COSTS

By Martin Gooch, Research Associate – Value Chains

The animosity that all-too-often emanates from the buying / selling interface between businesses can ruin an otherwise promising commercial relationship. Perhaps nowhere is this more apparent than in the agri-food sector where tight margins and intense competition lead to a practice of reactively forcing suppliers down to the lowest possible price. More about price allocation than continuous improvement, this approach results in reduced financial performance for everyone and proves a fruitless exercise when considered from a longer-term perspective.

There is a struggle between suppliers and buyers that becomes polarized through trying to achieve a competitive advantage, each at the expense of the other. Suppliers are influenced by performance measures and incentives that discourage, rather than encourage, their businesses to adopt practices that are sufficiently reflective of customers' strategic orientation.

Similar to a boxing match, resources are invested in achieving a knock-out punch that will provide a breathing space for the business; allowing it to strengthen the bank account through higher prices - for a while at least. Simultaneously, with a focus on the immediate rather than the future, disproportionately less investment is made to attain long-term competitive advantage.

However, a superior price discovery model is steadily becoming established in the agri-food sector. It is born from practices developed by the automotive industry to enhance competitiveness by establishing mutually beneficial long-term relationships between buyers and suppliers, through defining Quality, Cost and Delivery (QCD) parameters.

Based on the principles of Kaizen or Target Costing, which begins by identifying the Unique Value Proposition (UVP) of the final product in order to match market requirements, Quality Based Pricing (QBP) takes a proactive rather than reactive approach to pricing and cost control. In doing so, it encourages businesses to work together for a common goal. What transpires is an intimate understanding of each others' challenges and needs; along with the extensive sharing of information, leading to the creation of knowledge and commercially significant innovation.

Not producing identical widgets, for which the Target or Kaizen system was first developed, meant that the model needed to be modified somewhat for agri-food. The signs are that this result, QBP, offers a highly effective alternative price discovery model for agri-food.

The QBP approach is fundamentally based on first identifying the required quality and target cost of the final product (including margin), then identifying the processes that must occur at each point along the chain in order to satisfy the end consumer. With all the parties having input into the overall pricing formula, the result is a system that provides incentives for suppliers to follow a pre-agreed path and behave as a team, rather than an individual whose behaviour is dictated by commodity prices that often bear no relationship whatsoever to the value of the end product.

QUALITY BASED PRICING CONTINUED ...

It hardly needs to be said that following this route requires a cultural shift throughout agri-food. The benefit of this route is that it offers all those involved an opportunity to add value to their operations by moving from a practice of 'how do we sell what we grow' to one of 'lets grow what the market wants, when it wants it, at the quality it wants'. Shifting the focus from production push to market pull depolarizes peoples' gaze away from price. The result is reduced adversity, longer-term thinking, and a more grounded approach to creating sustainable value.

An example of the success of QBP comes from the fruit processing (canning and juice) sector. Applied as part of a continual improvement initiative that stretched the length of the chain, the QBP approach provided financial benefits of over CAD\$6 million in the first year. Of that, producers received approximately CAD\$2 million in increased revenue. The catalyst was that the processor, a multi-million dollar producer-owned cooperative sourcing from over 170 growers had been steadily losing its competitiveness and finally, in 2003, reported a loss.

Prior to the QBP initiative, producers had not seen a price increase for 10 years. Within three years of its introduction, producers could achieve a 22% increase in returns and, simultaneously, reduce their costs. The processor and retailer are benefiting financially too. And consumers can purchase a superior, healthier product. By working together, the entire chain has placed itself in a position of being able to produce a better end quality product at a lower cost!

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AT LAST JOINT LAMB PROMOTION UNDERWAY IN THE U.S.

This week could mark the start of a new era of co-operation for lamb promotion in the United States. Representatives from the Australian, New Zealand and US lamb industries will meet in Denver, Colorado, to discuss plans for co-operative lamb promotion and research initiatives.

Historically, the three nations have viewed each other as competitors – vying for a share of the US lamb consumer's dollar. While commercial competition will undoubtedly continue, the Tri-Lamb initiative is about recognizing a problem shared by all. Per capita lamb consumption in the United States has been static or declining since the beginning of the 1900s. Other protein sources, especially pork and chicken, have increased their market share. "That dominance is so great that up to 80pc of all Americans say they haven't tried lamb," Meat & Livestock Australia's regional manager in the US, Michelle Gorman said. "Annual consumption of lamb in the US is about 1.3 pound (0.6kg) per person, which represents less than 1pc of US meat consumption. So the challenge is significant.

In comparison, Australians consume about 22 pounds (10.2kg) per person per year. "We want to ensure that lamb is high in the consciousness of retailers, restaurateurs and consumers alike, and we have the best possible hope of achieving this as a united industry, so this is a very important meeting for Australian farmers," Mrs Gorman said.

SOURCE: http://www.farmonline.com.au/news_daily.asp?ag_id=38252

N.C. POULTRY COMPANY 'CERTIFIED HUMANE'

UNITED STATES: North Carolina-based Alison's Family Farms Chickens have been approved to use the "Certified Humane" Label.

Alison's Family Farms of Marshville, N.C. has received approval from Humane Farm Animal Care (HFAC) to use the "Certified Humane" label on its natural air-chilled fresh chickens. Alison's was certified to use the label on its natural turkeys in 2005.

More than 55 companies have been certified since HFAC's program was unveiled in May 2003. The "Certified Humane Raised and Handled" label assures consumers that a meat, poultry, egg or dairy product has been produced according to HFAC's precise standards for humane farm animal treatment. Animals must receive a nutritious diet without antibiotics or hormones and must be raised with shelter, resting areas and space sufficient to support natural behavior.

Alison's Family Farms says it raises its chickens on an all-vegetable diet and its flocks have access to the outdoors. Its turkeys and chickens are sold in retail stores from New England to Florida, including Balducci's, Hannaford Bros., Earth Fare, Greenlife, Home Economist, Kash n' Karry and Albertson's.

Source: <http://www.meatnews.com/index.cfm?fuseaction=Article&artNum=12818>

ORGANIC SHEEP GRAZE MEDICINAL HERBS

While many intensive sheep farms rely on routine drenches to control intestinal worms, at least one organic flock is finding that herbs can replace the chemical treatments.

It's late in the season but a soft Irish autumn means the pastures are still lush and green at the Greenmount organic farm. This year's lambs are well grown now and college lecturer Charlotte Moore swings open the gate to allow them into fresh grazing. But this is no ordinary pasture because as well as the grass and clover mix, a wide strip of chicory has been planted along one side of the field. Even this late in the season there are distinctive blue flowers dotted through the green, leafy sward of herbs. And now the lambs are moving straight to the herbs, nibbling the leaves.



Ms Moore explains that instead of being dosed with a worm drench every six weeks or so, the sheep are brought to the chicory field. The precise science behind it is still being investigated but the researchers believe that tannins in the chicory plant suppress worm eggs in the sheep's intestines. "There is more to it than that," says Ms Moore who says that a full scale experiment is now under way to better understand the medicinal properties of chicory. But for now the evidence is that the herb is proving an effective wormer.

For two years now, the Greenmount flock has not had to be drenched and laboratory analysis of the sheep's droppings shows there is no build up of worms in the animals. Charlotte Moore describes the results as "encouraging" and says the sheep are fond of the chicory. So much so, that if chicory seeds are included when pasture is being sown out, the sheep tend to graze it out. Access to the chicory strip is restricted to just a few days at a time and this seems to be enough to purge the worm burden from the sheep's gut.

The Agrifood and Biosciences Institute at Hillsborough is now carrying out a full scientific investigation. The results may well have significant benefits for not just organic farms but sheep flocks generally where resistance to chemical wormers is an increasing problem.

Source: http://news.bbc.co.uk/2/hi/uk_news/northern_ireland/6084068.stm

NEW ZEALAND LAMB EXPORTS STEADY

NEW ZEALAND: Lamb exporters shipped 19,933 metric tons of product in September, unchanged from year-ago levels.

New Zealand lamb exports during September 2006 totaled 19,933 metric tons -- unchanged from year-ago levels. However, lamb exports during the first nine months of 2006 increased three percent compared to the same period last year -- to 246,820 metric tons.

According to Agri-fax NZ, demand for New Zealand lamb in non-EU markets has been weaker due to the higher drought-induced production in Australia. Lamb shipments to the European Union during September 2006 increased seven percent compared to one year-ago levels, to 10,071 metric tons, with steady demand for legs and loin cuts, according to Agri-fax NZ. Lamb exports to the European Union during the first nine months of 2006 were up eight percent on the same period last year -- to 131,537 metric tons. Within the European Union, New Zealand lamb exports to the United Kingdom were up 13 percent compared to September 2005 exports -- to 4,287 metric tons. However, lamb exports to France slipped nine percent to 2,091 metric tons.

Exports of New Zealand lamb to the United States increased 35 percent during September to 2,029 metric tons, with shipments over the first nine months of the year one percent higher than the same period last year, at 15,626 metric tons. New Zealand lamb exports to Japan during September shrank 29 percent compared to September 2005 to 649 metric tons. Shipments to Japan during the first nine months of 2006 have been strong, however, increasing 10 percent compared to the same period last year -- to 10,402 metric tons.

Source: <http://www.meatnews.com/index.cfm?fuseaction=Article&artNum=12785>

BMP'S ENHANCE ENVIRONMENTAL AND ECONOMIC SUSTAINABILITY

By Beth Sparling and Cher Brethour Research Associates—Environment

In the Summer 2005 edition of *Agri-food for Thought*, the George Morris Centre described upcoming research on the ways farm practices that conserve soil and water can affect a producer's bottom line. The research, conducted for the Crop Nutrients Council, on the costs and benefits of these beneficial management practices (BMPs) is now complete. The results indicate that these practices are not just about improving the environment - many of the BMPs investigated improve farm profitability as well.

In order to gather information on the costs and benefits of BMPs, a telephone survey of 1,000 agricultural producers across Canada was conducted by Ipsos Reid. The survey data was used as part of the George Morris Centre research to examine the profitability before and after the implementation of crop nutrient BMPs, including soil testing, nutrient management planning, manure management, variable rate fertilization, buffer strips, and reduced tillage practices (minimum tillage and no-till).

Almost all producers surveyed (97%) were using at least one BMP and 50% of producers were using multiple practices. According to the survey results, key reasons for adoption of BMPs included increased yields, more efficient use of fertilizer and manure, concerns about soil quality and erosion, as well as fuel, labour, and monetary savings. When asked, producers stated that the greatest barriers to adoption were cost, believing a BMP was unnecessary, and a lack of equipment.

Characteristics of farms and farm operators were also identified as influential factors relevant to BMP adoption. The economic literature suggested that larger farms, farms with higher gross sales, and producers with off-farm income or higher levels of education were generally more likely to adopt BMPs. The results of the Ipsos Reid survey confirm that larger farms (in terms of acreage) typically have the highest levels of BMP adoption.

The George Morris Centre research provides farmers with information on how the adoption of BMPs affects their bottom line. The research used average provincial revenues and expenses, crop rotations, and farm sizes to examine the impact of BMPs on farm incomes in Alberta, Saskatchewan, Manitoba, Ontario, Quebec and PEI.

For the longest time, producers have lacked information on the economic viability of BMPs. The results of this research show that, in many cases, the implementation of BMPs improves farm profitability. Soil testing, nutrient management planning, minimum tillage and no-till were the top-performing BMPs. These practices generally produced increased yields that offset any increases in operating costs, enhancing farm profitability.

In general, variable rate fertilization and buffer strips were not as profitable, at least in the absence of incentives. Typically, these practices reduced profitability, due to increased costs. In all cases examined, buffer strips caused reductions in farm income due to the high costs of establishment and lost crop production. However, it is worth noting that buffer strips have intangible benefits for producers through reduced soil erosion and water quality improvements when established along stream banks.



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BMP's continued

At the individual crop level, spring wheat in Quebec and Western Canada, and winter wheat in Ontario were the crops that were most responsive to the introduction of beneficial management practices, showing an increase in expected net revenue for most BMPs analyzed, regardless of the province.

On average, fewer than 10% of the producers surveyed had received financial incentives to assist with BMP adoption. However, funding is available through the National Farm Stewardship program and the Greencover Canada program for all of the BMPs examined, with the exception of soil testing. In response to this issue, government and industry need to ensure that producers are aware of the financial assistance programs, that there is sufficient compensation from the programs, that the application processes are simple, and that confidentiality is maintained for producers who apply. Access to funding is only one part of the equation to ensure that producers adopt BMPs. In addition to funding, the producers surveyed felt that written materials, workshops, and agricultural extension

assistance on how to adopt practices would improve the use of BMPs.

In closing, to maximize profitability, producers need to consider all aspects of their farms. Prosperity will depend, not only on applying 'best practices' to their operations, but to the environment as well. Enhancing environmental sustainability on the farm over the long term will improve economic sustainability.

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The research was supported by the Crop Nutrients Council and the Advancing Canadian Agriculture and Agri-Food (ACAAF) Program.

Agriculture and Agri-Food Canada (AAFC) defines a BMP as any farming method that reduces the impact on the environment without affecting farm performance.

The telephone survey was conducted on behalf of the Crop Nutrients Council. Results of the survey will be available at www.georgemorris.org.

Results of the George Morris Centre research will be posted online at www.georgemorris.org in late fall 2006.