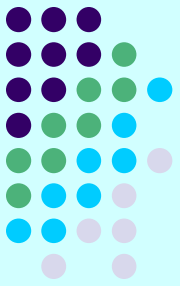


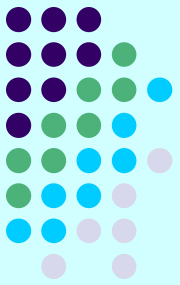
National Horsemen's Benevolent and Protective Association Winter Convention



March 18, 2011

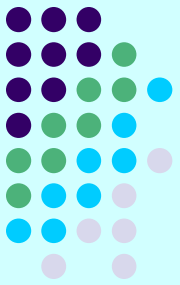


Kentucky Equine Industry Economic & Workforce Impact



- 80,000 - 100,000 direct and indirect jobs
- 128,800 participants in farming, racing and equine-related businesses
- 14,600 tourism-related jobs
- \$4 billion est. economic impact of equine industry
- \$8.8 billion est. economic impact of tourism
(Horse industry is signature attraction.)
- Top agricultural cash crop
(30% of economic activity is agriculture-related.)

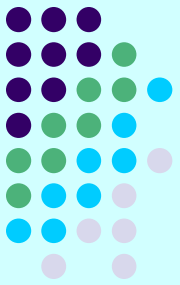
Assets of Kentucky's World Class Horse Industry



- Spectator facilities and events
- Horse healthcare expertise and facilities
- Agencies and associations – breeding, registry, trade, governing & non-profit organizations
- Media sources (print and electronic)
- Support vendors & manufacturers
- Farm capacity and training experts
- Information technology and software systems
- Research & development support
- Legal and legislative specialist

North American Racing Academy

Equine programs provided by
Bluegrass Community and Technical College



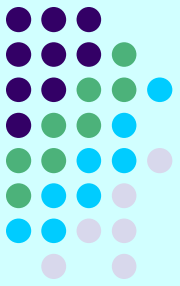
Mission Statement

The mission of the North American Racing Academy is to develop and operate a world-class racing school that will provide students with the education, training and experience needed to become skilled in the art of race riding, proficient in the care and management of racehorses, and knowledgeable about the workings of the racing industry as a whole.



North American Racing Academy

equine programs provided by
Bluegrass Community and Technical College

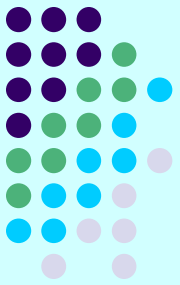


- 2006 - jockey program stated by Chris McCarron
2009 - horseman program added
 - 53 enrollees – 37 credentials – 34 licensed
 - Licenses: 12 jockey – 17 exercise rider – 3 groom – 2 trainer / assistant trainer
- 2010-11
 - 23 enrolled in Fall – 18 current – 5 additional finishing degree requirements



North American Racing Academy

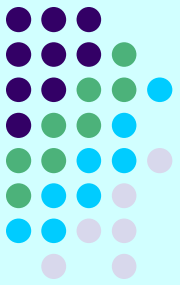
equine programs provided by
Bluegrass Community and Technical College



- **Jockeys Success Impressive!** (as of March 14, 2011)
 - 11 winners
 - 7,392 mounts
 - 756 wins – 825 seconds – 850 thirds
 - Purses of \$10,055,905
 - Two jockeys at over two million dollars in earnings
 - Ben Creed & Jackie Davis
 - One jockey at over one million dollars in earnings
 - Matt Straight

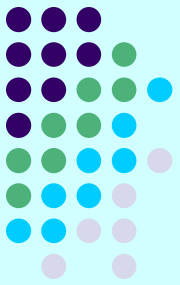


Current NARA Equine Programs



- Associate in Applied Science in *Equine Studies - Jockey*
- Associate in Applied Science in *Equine Studies - Horseman*
- Associate in Applied Science in *Business Management - Equine*
- Diplomas in Equine Studies - Jockey & Horseman
- Certificate in Equine Studies - Exercise Rider
- Workforce Solutions industry training

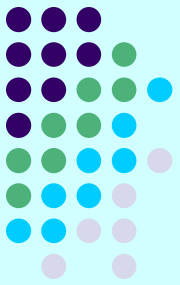
Kentucky College & University Equine Programs



Asbury University
Bluegrass Community
and Technical College
Berea College
Brescia University
Eastern Kentucky
University
Georgetown College

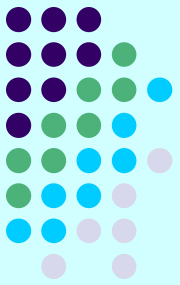
Kentucky State University
Midway College
Morehead State University
Murray State University
Transylvania University
University of Kentucky
University of Louisville
Western Kentucky
University

Fall 2010 Program Study and Planning for KCTCS



- Engaged Clements Group to conduct a study of the program
- Project Goal: Develop strategies for KCTCS colleges to further support the workforce competitive success of the Kentucky equine industry by:
 - supporting a proper supply of qualified credentialed candidates in the labor pool
 - enhancing incumbent workforce performance

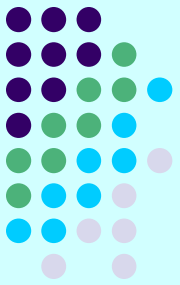
Fall 2010 Program Study Strategies



- Project teams, kick off and update meetings
- Review of internal capacity & strengths
- Internal interviews & review of program data
- Secondary research and industry profile
- Industry Leader & Education Provider interviews
- Industry Forums
 - National Horse Benevolent and Protective Association Board
 - Churchill Downs Racing Industry
 - Keeneland Racing Industry Forum
 - Kentucky Horse Park Forum

Fall 2010 Program Study

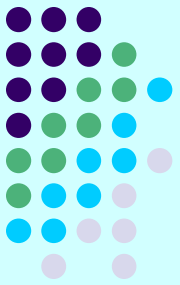
Economic & Political Challenges



- Economic climate for “wealth dependent” business
- Agriculture / farming changes & trends
- Workforce availability, quality & recruitment challenges
- Aging consumer and owner / little next generation interest
- Strong commitment to tradition & resistance to change
- No national regulating organization / operational fragmentation
- Politically driven industry regulations by individual states
- Lack of leadership voice & clear message
- Poor awareness of economic & workforce impact
- Gambling, sport vs. entertainment sales philosophy

Fall 2010 Program Study

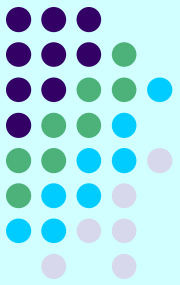
Workforce Challenges



- Migrant labor dependent / immigration issues
- Language & cultural barriers
- Low-wage & low-skill
- Aging workforce, less “generational family farming”
- Perception of low / no career advancement
- Image of the industry as “dying/declining”
- Unfamiliar occupational titles & roles
- Unclear & undefined career pathways
- Limited continuing education system

Fall 2010 Program Study

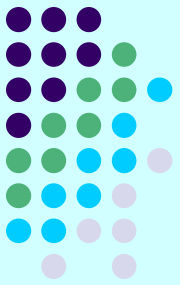
Entry-Level Skill Gaps



- Shortages in “American” foreman & supervisory level employees
- English language skills
- Foundational knowledge of horse care & horse handling techniques
- Communication (listening, speaking, writing)
- Reading and math skills
- Workplace professionalism & work-ethic
- Personal financial literacy & life skills
- Time management

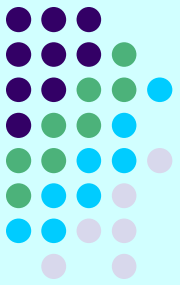
Fall 2010 Program Study

Supervisory-Level Skill Gaps



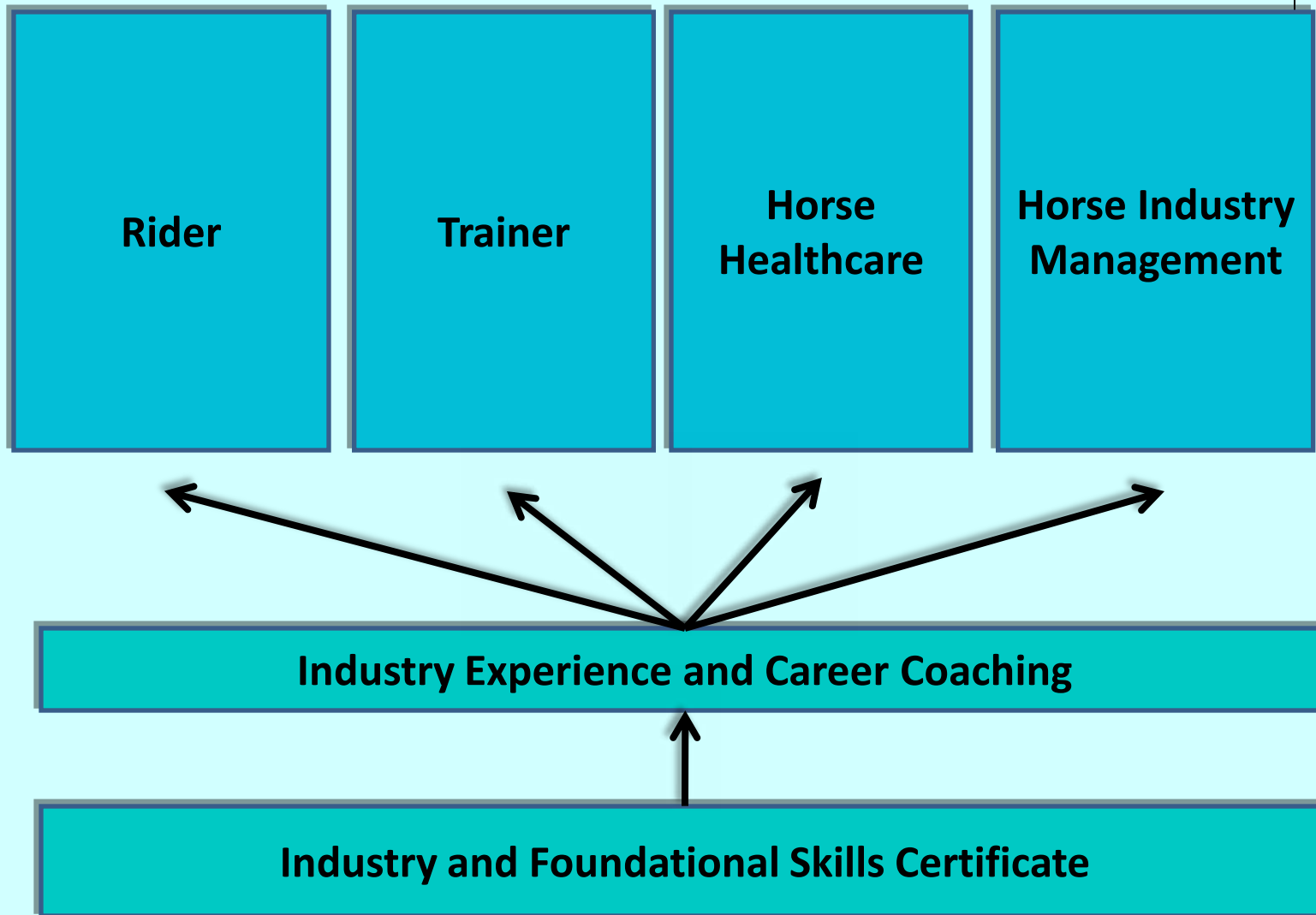
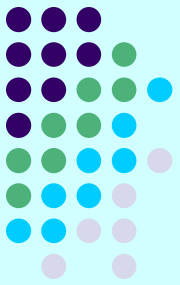
- English language
- Leadership skills
- Time and operational management
- Motivation & evaluation of past peers
- Spanish & cultural awareness
- Foundational knowledge of the industry
- Accounting, “business 101”, cost containment

Fall 2010 Program Study Industry-Awareness Gap

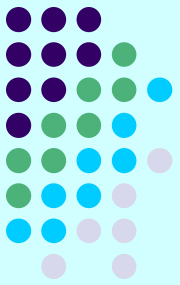


- Majority of the study participants indicated that they feel students should participate in *internships/apprentice educational experiences*
- Key concerns:
 - safety compliance
 - confirmation of employer's role
 - alignment of student expectations
 - intensity of commitment / work ethic
 - professionalism and availability
(hours, time of day, time of year)

Equine Industry Career Ladders

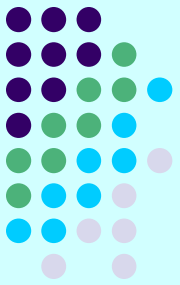


Opportunity for KCTCS Center of Excellence

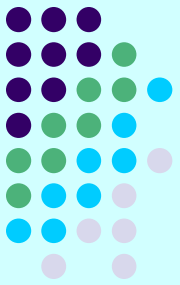


- Statewide workforce and impact & demand
- National & global potential
- Catalyst for facilitation in increasing collaboration
- Partnering opportunities with organizations & employer
- Infrastructure requirements can be leveraged effectively
- Partnering opportunities with education – secondary & post-secondary
- Viable business model / Operational cost efficiency
- Focus on Accountable organization structure & operations
- Marketing & public relations

Industry Partnering Critical



- Thoroughbred Industry
 - Current program repositioning and reengineering
 - New programs in horse management
 - Workforce focus:
 - Horse industry career readiness certificate (NCRC+), CEU, professional licensure, and corporate training
- Sport Horse Industry
 - Launch current programs and new programs contextualized for industry sector
- Resource Development
 - Private sector and grant-seeking



Questions?

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Bluegrass Community & Technical College***

859-246-6501

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