

[93 members polled; 61 responding member companies =65% return rate]

Fire Apparatus Manufacturers' Association

2002 Member Survey Responses

"LONG RANGE PLANNING"

1. What do you think the primary goals of the FAMA organization should be?

(Rate 1 – 5, With 5 being the most important)



Addressing Governmental Affairs Issues	3.7
Participation in NFPA Standards Development	4.2
Collect and Distribute Industry Statistics	4.0
Promote Manufacturer/supplier Networking	3.9
Opportunity for participation in Technical Committees	3.8
Social Interaction Among members	3.1
Interaction with Fire Marketing Industry as a whole	3.6
Industry Image – Self Criticism and Examination	3.2
Grants, Scholarship	2.2

2. In the **Technical** area, which topics are most important to you and your company? (please state)

Changes in bodies

Line voltage

Equipment requirements

New technologies that the apparatus builders are considering

NFPA issues and their impact on our member companies

Multiplexing

Vehicle Weight

Regulatory Issues

Corrosion durability

Making vehicles the safest and most efficient to drive down the road

Varies over time, determined by market trends and NFPA 1901 changes. Right now, it's electrical changes wrt multiplexing and the advent of 42 volt systems

Development and implementation of standards of standards relating to proper functioning of the emergency vehicle electrical system

Items that pertain to apparatus construction, plumbing, electrical

Promoting fire apparatus with longevity and safer operation features

New standards

Engine and transmission changes

Impact of NFPA on engines and generators

Engine requirements

Performance standards (2)

2. In the **Technical** area, which topics are most important to you and your company? (Cont'd)

OEMS

Engine manufacturers' installation requirements

Input to NFPA for standards development

Issues/information affecting the industry

Ability to interact with other member engineering personnel

Chassis and body

ALL

Electrical and controls

New Products

NFPA standards (3)

Apparatus construction innovations

Electrical 110/220 volt

Electrical systems

Air, hydraulic and electrical systems for auxiliary equipment

Electrical/electronics (2)



2. In the **Technical** area, which topics are most important to you and your company? (Cont'd)

Functions

Foam/foam systems (2)

Safety (2)

Water flow

Testing criteria

Pump/plumbing issues (3)

Standardizing the electronics – it's the most complex area of an apparatus and will grow in importance in the future

Anything related to NFPA proposed changes

Aerial device

Electronics (multiplexing) (2)

Helping fire and "emergence" build a better unit

Water and foam issues

Body configuration issues

Chassis, axles and wheels

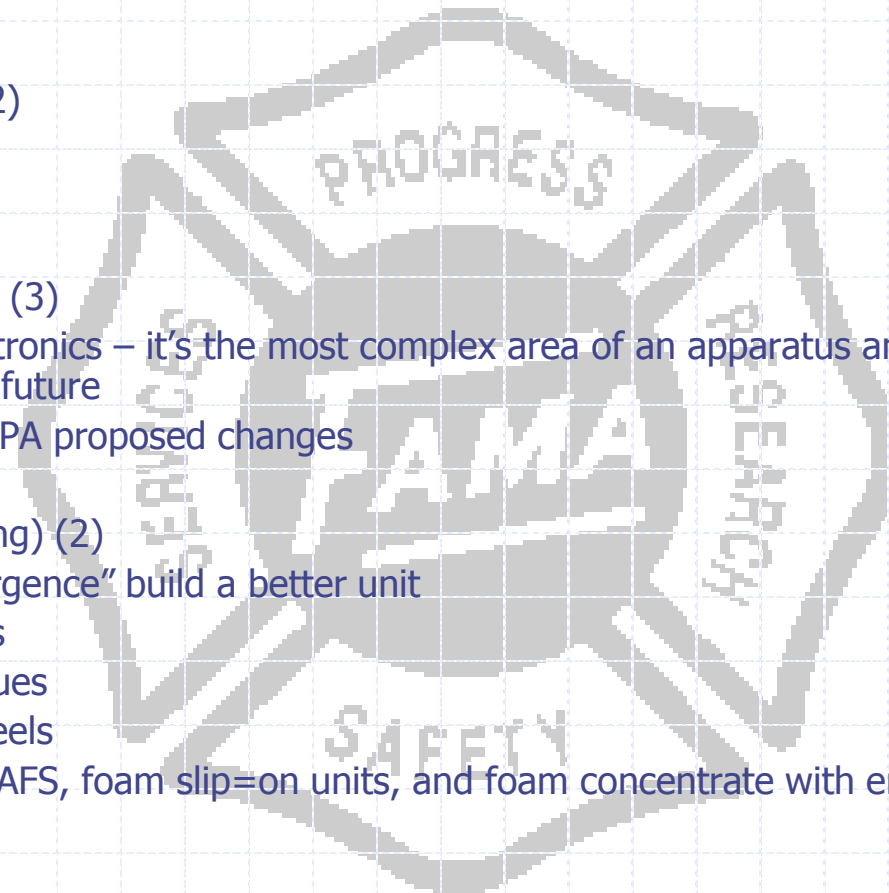
Foam proportioners, CAFS, foam slip-on units, and foam concentrate with emphasis on Class A foam

Electrical

Body

Stainless steel piping and manifolding

Foam systems



2. In the **Technical** area, which topics are most important to you and your company? (Cont'd)

Foam Systems

NFPA 1901

Potential for third party certification of flashlights, electrical/wiring both 110V and 12V

Establishing minimum performance standards for portable lighting/flashlights on fire apparatus

Keeping current with NFPA and new technologies

NFPA and ISO changes and updates

Standards on apparatus – continue to improve for safety and performance

Marking requirements, labeling, electrical panels

Foam and pump issues

New technology in the “large” automotive world, such as engines, transmissions, electrical systems, new materials such as composites and light-weight alloys

Issues that involve interaction such as multiplexing where various manufacturers must coordinate their products to work with the completed apparatus

3. Membership Meetings

A. FAMA currently holds **two membership meetings** each year (Spring & Fall) Would you:

Maintain the same schedule 49

Increase number of meetings 1

Decrease number of meetings 10

Comments:

One meeting a year would reduce the annual cost to attend and may increase the number of attendees.

Have one meeting (maybe a day longer) with better accommodations.

One per year (4)

B. Does your company attend both the spring and fall meetings each year?

Yes

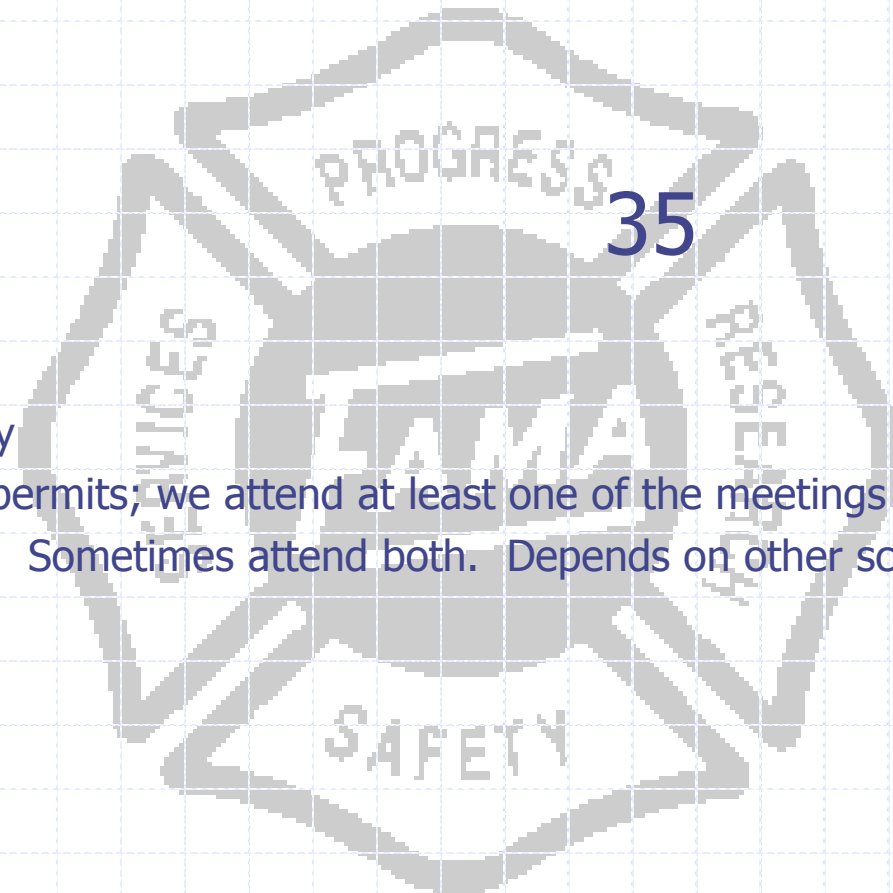
35

Comments:

Normally

If time permits; we attend at least one of the meetings

Sometimes attend both. Depends on other scheduling.



B. Does your company attend both the spring and fall meetings each year? (cont'd)

No

25

Comments:

Currently budgeted for one meeting per year

Too many conflicts with other duties

No time (3)

Too Expensive

Our prior management did not deem it necessary. That philosophy has now changed and our president will become more involved in FAMA and plans to attend both meetings.

Regular responsibilities override what is seen as optional activities without direct profit results

Usually due to scheduling conflicts with other trade shows

No, however I am the rep for our company and have attended meetings in the past. The last two years, timing has been bad and I have not been able to attend. I am also meeting some resistance with the cost to attend.

No, attend combined meeting with FEMSA; more cost effective

Conflicting Schedules

B. Does your company attend both the spring and fall meetings each year? (cont'd)

Something always seems to conflict with the spring meeting

Budgetary constraints will not permit attendance at both, so we elect to do the fall meeting only.

Limited value

We do not have enough time for both

More business is conducted during fall meeting

Usually due to scheduling

Spring meeting too expensive usually

Other use for funds

Unable to allocate resources for both

No, only the fall meeting. Two reasons: the spring meeting is in a location that is too difficult to support with the company and there are too many conflicting events, such as trade shows in the spring. Have one meeting in January. Yes, the cost is higher, but we would only go to one meeting instead of two.

Cost, scheduling conflicts

We are an OEM supplier to the industry

C. Do you personally attend both the Spring and Fall Meetings each year? (If No, why not?; please also indicate how many meetings you have personally attended.)

Yes

37

Comments:

13

More than several, but I have skipped a few due to too little time

Approximately 10

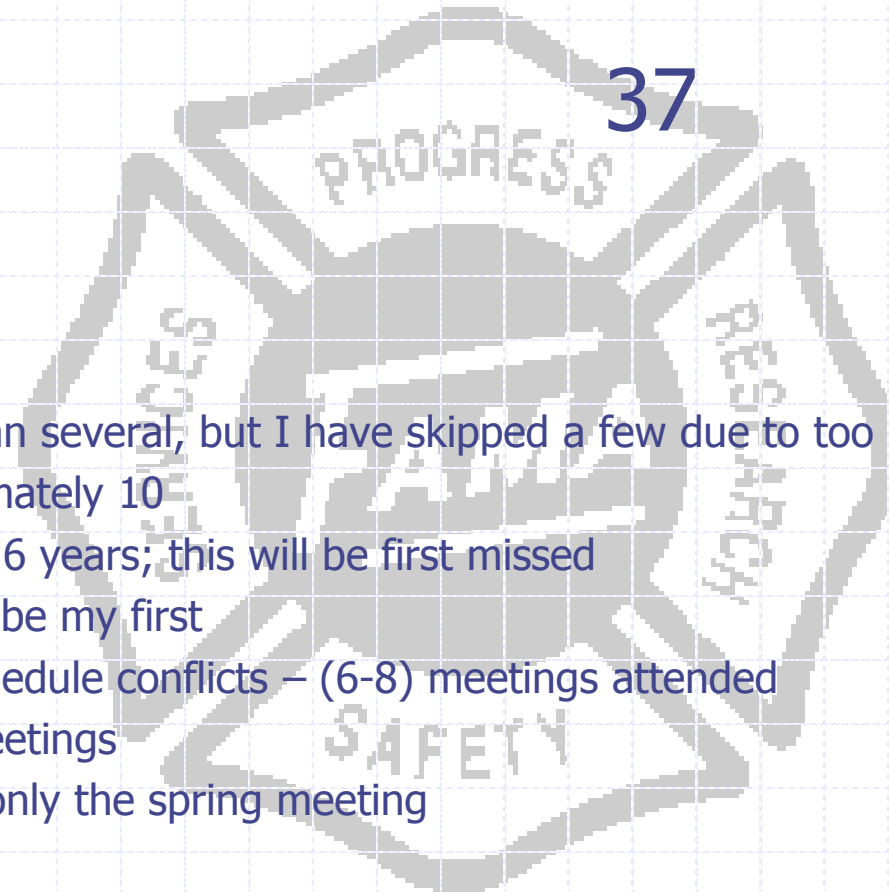
For past 6 years; this will be first missed

This will be my first

If no schedule conflicts – (6-8) meetings attended

7 – 9 meetings

Usually only the spring meeting



C. Do you personally attend both the Spring and Fall Meetings each year? (If No, why not?; please also indicate how many meetings you have personally attended.) (Cont'd)

No

23

Comments:

Usually attend the spring meeting; I've attended 9 meetings

Too many conflicts with other duties

No time (2)

Attended 4

As the new president of the company, this will be my first

Regular responsibilities override what is seen as optional activities without direct profit results. Have attended 3 or 4 times.

New with company

No, however I am the rep for our company and have attended meetings in the past

Scheduling does not always permit attendance. We try to send a substitute from within the company whenever workable.

No, attend only fall meeting with FEMSA; belong to both; more cost effective
Conflicting Schedules

C. Do you personally attend both the Spring and Fall Meetings each year? (If No, why not?; please also indicate how many meetings you have personally attended.) (Cont'd)

No

23

Comments:

Something always seems to conflict with the spring meeting

Attended 1

No, but have attended many over the years

I can't always fit into my schedule; have attended 8 or 9 meetings

One per year (fall)

I have never been to any meetings, but plan to get more involved this year

I attend the fall meeting. Our company attends both

Fall meeting only – 3 or 4 so far

Other use for the funds Have in past, but must reduce it to once each year due to budget and time constraints

Missed a few due to other commitments

No, only the fall meeting. The spring meeting is in a location that is too difficult to support within the company and there are too many conflicting events, such as trade shows in the spring. Have one meeting in January. The cost is higher, but we should only go to one meeting instead of two. I represent our company

D. Are you satisfied with the content of membership meetings?
(Indicate "Yes" or "No"; if no, please specify)

Yes

43

Comments:

Those that I have attended have been worthwhile
Meetings I have attended I thought were very good
The content is fine, but time is becoming an increasingly valuable commodity. If a two meeting per year plan is continued, we may need to consider skipping one of the other meeting.

Yes, but I would have more interaction with end users at each meeting.
The local fire chief needs to be invited for a roundtable session at each meeting.

Has been good

D. Are you satisfied with the content of membership meetings?
(Indicate "Yes" or "No"; if no, please specify) (Cont'd.)

Comments:

Not really. I think new products, safer products, and the guests should be a little less self indulgent to the current board.

Not always – it is difficult for sales people and/or manufacturers to not let their own self-serving biases enter into some of the subject matter.

Continue to improve – speakers/programs

Sometimes speakers/topics are not of great interest

We need to make it attractive to apparatus builders

The general sessions are good, but I don't feel we accomplish much past those sessions. If the agenda were to be limited to one day and travel distances were not more than ½ day distance by air, the attendance would probably be higher. For those that enjoy or desire to have extracurricular activities, generally know how and where to obtain them and can network with those they wish to participate with them.

We lack meaningful discussions due to the lack of topics that face our industry

Not Always

1

Of the following, select all topics of interest to you with a "Yes" or a "No".



Business Management	2
Day to Day Operations	36
Financial Planning	26
Successorship	21
?	2
Industry News/ Trends	50
Motivational Speakers	30
?	1
Sometimes	1

Of the following, select all topics of interest to you with a "Yes" or a "No". (cont'd)

Other:

User Interface

39

Roundtables

42

Roundtables with Chiefs

45

Comments:

Some chiefs with open minds

Yes, with proper selection

Depends on the chiefs

We need fresh faces

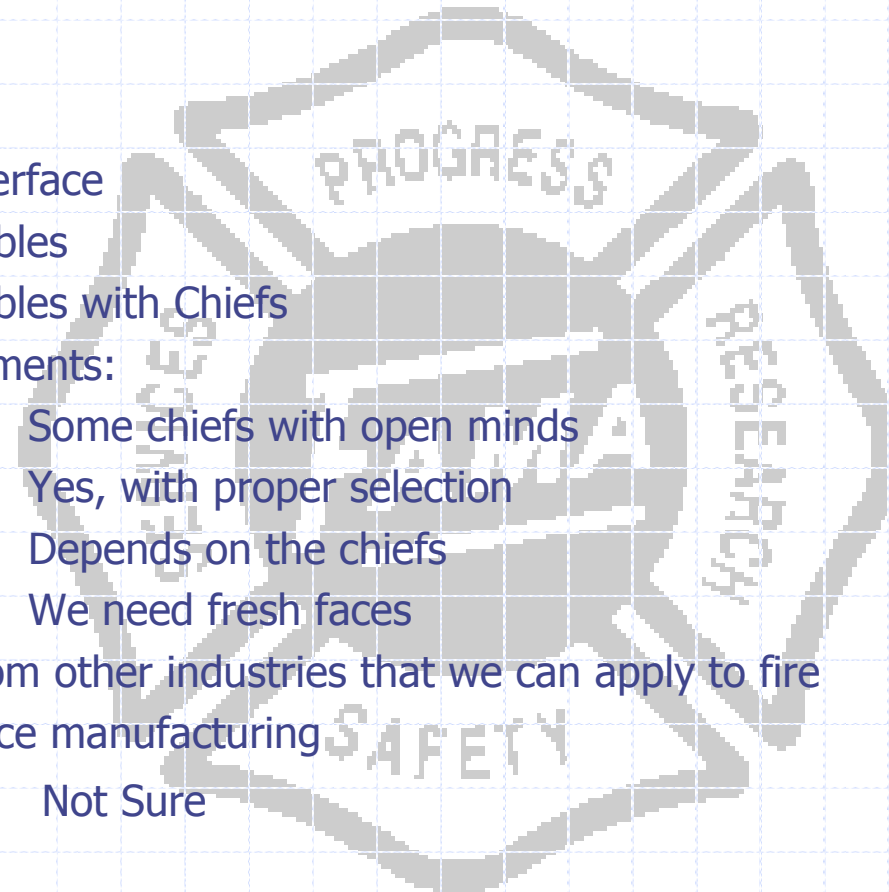
Ideas from other industries that we can apply to fire

Service manufacturing

51

Not Sure

1



Of the following, select all topics of interest to you with a "Yes" or a "No". (Cont'd)

Other:

Customer Speakers

39

Comments:

Not if we do roundtables with chiefs

Input yes, "speeches" no

Yes, with proper selection

Proper maintenance on the body of your apparatus

Tech fall meeting with management meeting

30

Comments:

An interesting concept. Let's consider it.

Technical issues

50

?

1

Not too technical, but big picture issues

Preventing galvanic corrosion

New materials, new manufacturing philosophies

D. Meeting Locations (Please indicate your preference)

Resorts

East Coast

Comments:

South only

Outer banks of the Carolinas

Central US

Comments:

Chicago is always great

West Coast

Comments:

Every other year

Try San Francisco or Napa

Canada

Comments:

Central/East

Toronto is a wonderful town

25

15

20

5



D. Meeting Locations (Please indicate your preference) cont'd

Resorts

Offshore areas

Comments:

South only

Every now and then

No Preference

Specific locations you would recommend:

Captiva

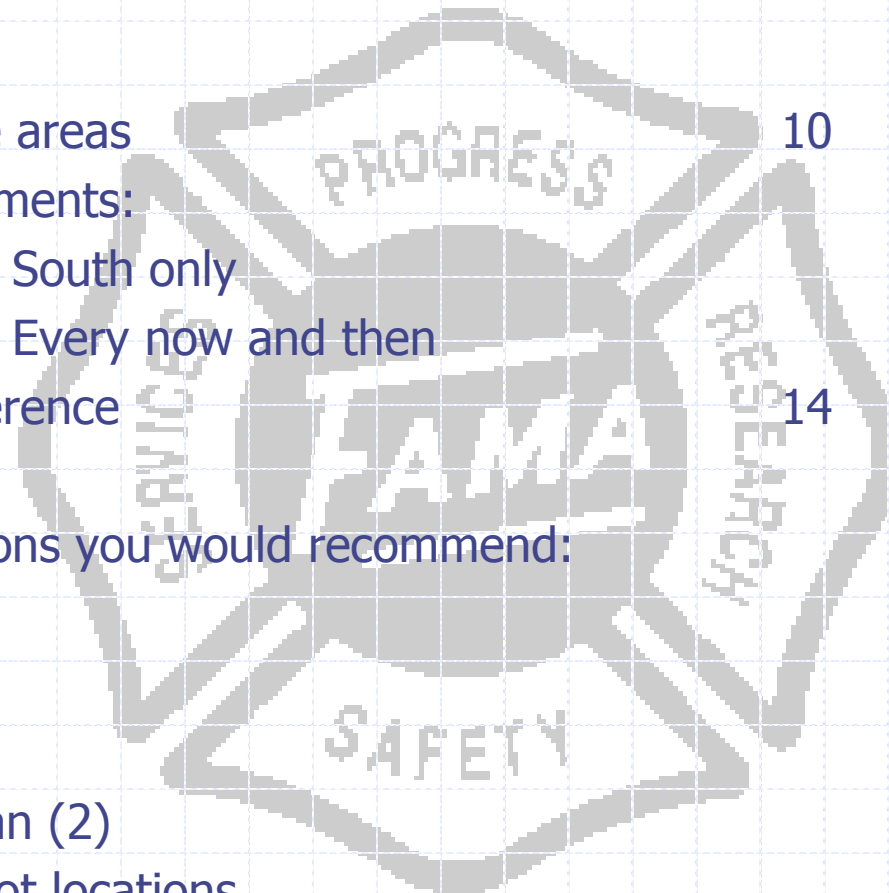
Fripps

Hawaii

Caribbean (2)

Warm/hot locations

Colorado Rockies



D. Meeting Locations (Please indicate your preference) cont'd

Specific locations you would recommend:

Warm Climate with golf and waterCaptive

Lake of the Ozarks

Key West seemed to be a meeting place that everyone enjoyed and did things as a group

New Orleans

Ft. Lauderdale

San Francisco

San Diego

Savannah, Georgia

New York City

Move around. I'm tired of the Southwest. Why not Canada

D. Meeting Locations (Please indicate your preference) cont'd.

Specific locations you would recommend:

I am totally against resort meetings. In networking with a number of members, I am aware that a number of them are not participating due to time away from the business due to travel time, an agenda more than one day and cost. If the locations were easier to get to and less expensive, you would see a greater number of participants.

Philadelphia

Pittsburgh

Columbus, OH

Phoenix

Ottawa

Vancouver

Needs to be near water and fun locations for non-golfers. (Palm Springs and Howie-In-The-Woods do not fit that criteria.)

D. Meeting Locations (Please indicate your preference) cont'd.

Specific locations you would recommend:

Too many times to West Coast

San Antonio, TX

Hawaii (Kauai, Big Island)

Key West

Newport Beach, CA

Coronado, CA

"Rotate"

If it would help get attendance up, perhaps one of the meeting locations (i.e. fall meeting) could be a bit more conservative to be sure that we are not "budgeting out" attendees.

Las Vegas

Denver

Anywhere in California, Arizona, New Mexico

D. Meeting Locations (Please indicate your preference) cont'd

Non-Resort

A large, semi-transparent watermark of the AMA logo is centered in the background. It is a Maltese cross with 'PROGRESS' at the top, 'RESEARCH' on the right, 'SAFETY' at the bottom, and 'SERVICES' on the left. In the center is a circle with 'AMA' and a stylized 'A' with a horizontal line through it.

East Coast	10
Comments:	
New York City	
Central US	10
Comments:	
Easier Travel for All	
West Coast	6
Canada	2
Comments:	
Central/East	
Offshore areas	2
No Preference	14

D. Meeting Locations (Please indicate your preference) cont'd

Non-Resort

Specific locations you would recommend:

Nashville

Chicago (2)

Minneapolis

Hilton Head

Fripps

Arizona

Las Vegas

New York City

Washington, DC

New Orleans

San Francisco

Dallas

California, Arizona, New Mexico, Reno/Lake Tahoe

Gulf Coast

Denver

Indianapolis

Memphis

Cincinnati

Philadelphia

Pittsburgh

Columbus, OH

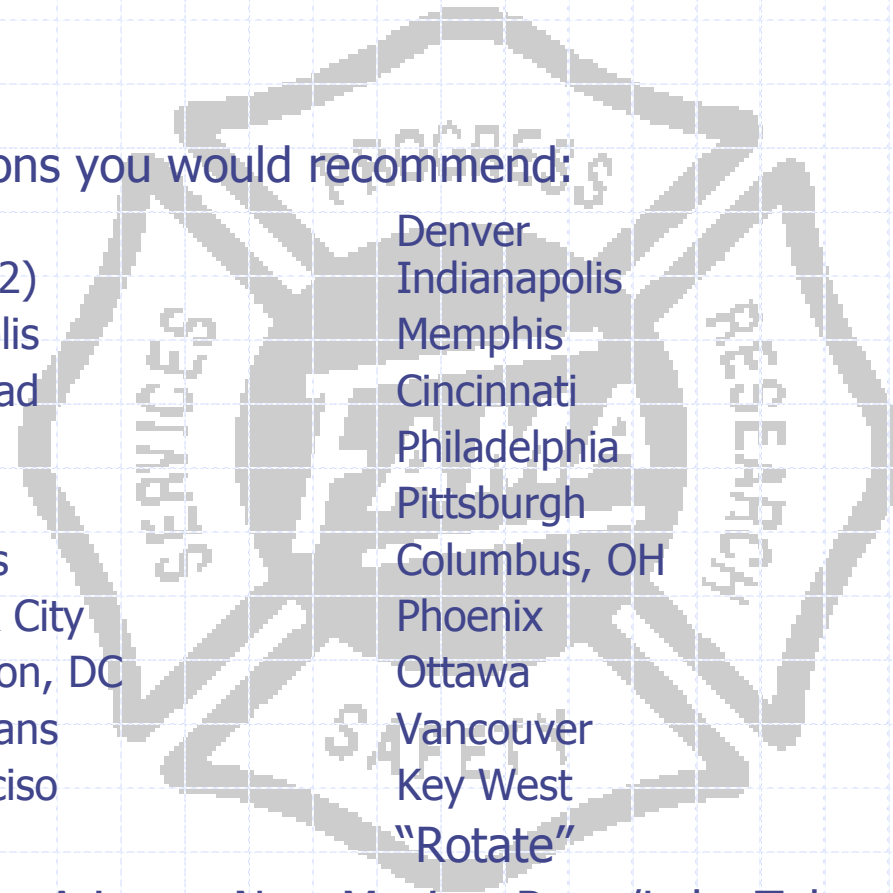
Phoenix

Ottawa


Vancouver

Key West

"Rotate"



E. Hotel Rates (Please indicate your preference)



A large, semi-transparent watermark of the AMA logo is centered in the background. The logo is a Maltese cross with the word 'AMA' in the center. The four quadrants of the cross contain the words 'PROGRESS', 'RESEARCH', 'SAFETY', and 'SERVICES' in a circular arrangement.

Not to exceed \$100 per night	3
Not to exceed \$150 per night	19
Not to exceed \$200 per night	25
Not to exceed \$250 per night	11
Not to exceed \$300 per night	0
Not to exceed \$350 per night	0

F. Meeting Fees (please indicate your preference)

Spring Meeting

Not to exceed \$200 per night	12
Not to exceed \$250 per night	18
Not to exceed \$300 per night	14
Not to exceed \$350 per night	10
Not to exceed \$400 per night	2

Comments:

Depends on Content

Fall Meeting

Not to exceed \$100 per person	10
Not to exceed \$150 per person	26
Not to exceed \$200 per person	22

4. Governmental Affairs - Do you feel our industry is adequately represented? (If no, please state what is lacking)

Yes

34

Comments:

Basically. It, as well as everything else could be better; we just need to be sure that additional efforts here do not consume abnormal time and budget for the return.

No

15

Comments:

Don't know; too new

I believe FAMA is on the right track with government affairs.
Anything more would be pouring money into a pit.

4. Governmental Affairs - Do you feel our industry is adequately represented? (If no, please state what is lacking) Cont'd

No

15

Comments:

Don't know; too new

I believe FAMA is on the right track with government affairs.

Anything more would be pouring money into a pit.

We need to be more pro-active in issues pertaining to FAMA members

Many other industries have people on or close to Capitol Hill to ensure we have a voice when needed.

No Canadian content

There is no leading voice or consolidated voice to the government. The fire service as a whole has the same problem.

4. Governmental Affairs - Do you feel our industry is adequately represented? (If no, please state what is lacking) Cont'd

No

15

Comments:

No, however I understand why. Typically each of us has more on our plates than we can handle with our own businesses and can devote little time to outside task. However, I don't think our association is financially strong enough for a dedicated watch-dog service.

Lobbying

Awareness and importance

We need to build a relationship with FEMA and stay involved in the Fire Grant and Homeland Defense issues.

4. Governmental Affairs - Do you feel our industry is adequately represented? (If no, please state what is lacking) Cont'd

No

15

Comments:

FEMA – NFPA – all the different bureaus difficult to get arms around. Almost need a paid staffer or consultant to provide information.

We need a louder voice on FEMA grants. Turning our industry (apparatus manufacturers) into almost a seasonal business.

Need more at times. Need grass roots support on critical issues when needed from our group.

No one in Washington

4. Governmental Affairs - Do you feel our industry is adequately represented? (If no, please state what is lacking) Cont'd

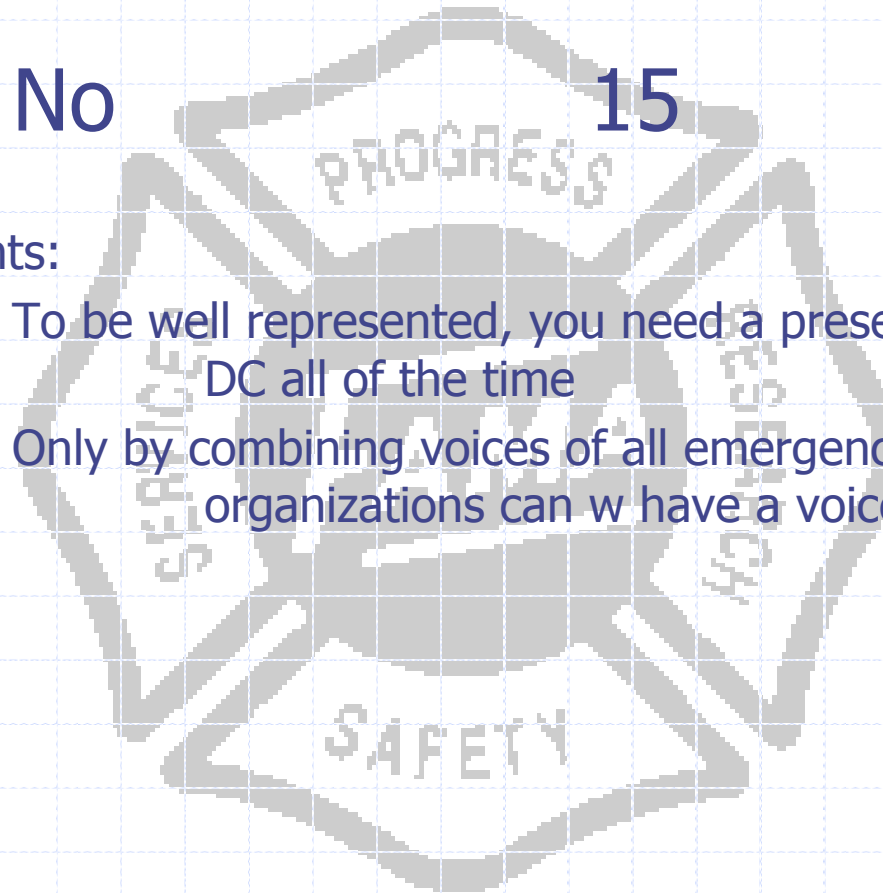
No

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Comments:

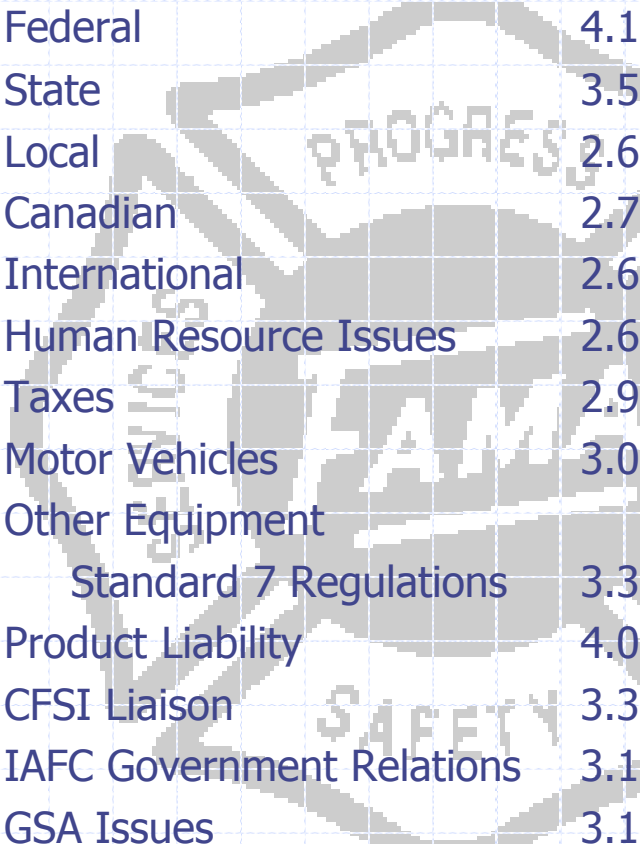
To be well represented, you need a presence in Washington, DC all of the time

Only by combining voices of all emergency services organizations can we have a voice that is heard.



4. Governmental Affairs -

Are the following **types of legislation** important to you?
(rate 1 – 5, with 5 being the most important)



Federal	4.1
State	3.5
Local	2.6
Canadian	2.7
International	2.6
Human Resource Issues	2.6
Taxes	2.9
Motor Vehicles	3.0
Other Equipment	
Standard 7 Regulations	3.3
Product Liability	4.0
CFSI Liaison	3.3
IAFC Government Relations	3.1
GSA Issues	3.1

5. Rollover Collection — Do you feel it is important that FAMA continue to pursue efforts to collect accident information involving fire apparatus and tanker rollovers?

Yes

40

Comments:

In case NFPA standards change

It is relevant to pursuing safer apparatus

So a determination can be made regarding changes to equipment that may make vehicles safer for emergency service personnel

Our primary product is tankers

The information alerts us to design requirements and gives us documented information to educate customers when specifying apparatus

Only if we are going to do something with the information

Any statistics that help to make vehicles safer should be gathered

To determine if it is a product issue or driver training issue

Keep us up to date on problems areas.

Other resources for this information is difficult

We can't get enough information when it comes to product liability

5. Rollover Collection — Do you feel it is important that FAMA continue to pursue efforts to collect accident information involving fire apparatus and tanker rollovers? (Cont'd)

Yes

40

Comments:

Only if it utilizes minimal resources to collect and disseminate the information

To help us evaluate what we build and how we build it

Good for industry and companies in industry, but must be simple and easy to do without all the DOT regulations.

Safety is our business

This is directly related to NFPA 1901, and we test our products to meet this standard

We need to know why

Not for our company, but as a firefighter

There is a problem which we should address

Don't know if it is productive. If it is useful info, then FAMA is the perfect place to manage the data and its collection.

Important issue to fire service

5. Rollover Collection — Do you feel it is important that FAMA continue to pursue efforts to collect accident information involving fire apparatus and tanker rollovers? (Cont'd)

Yes

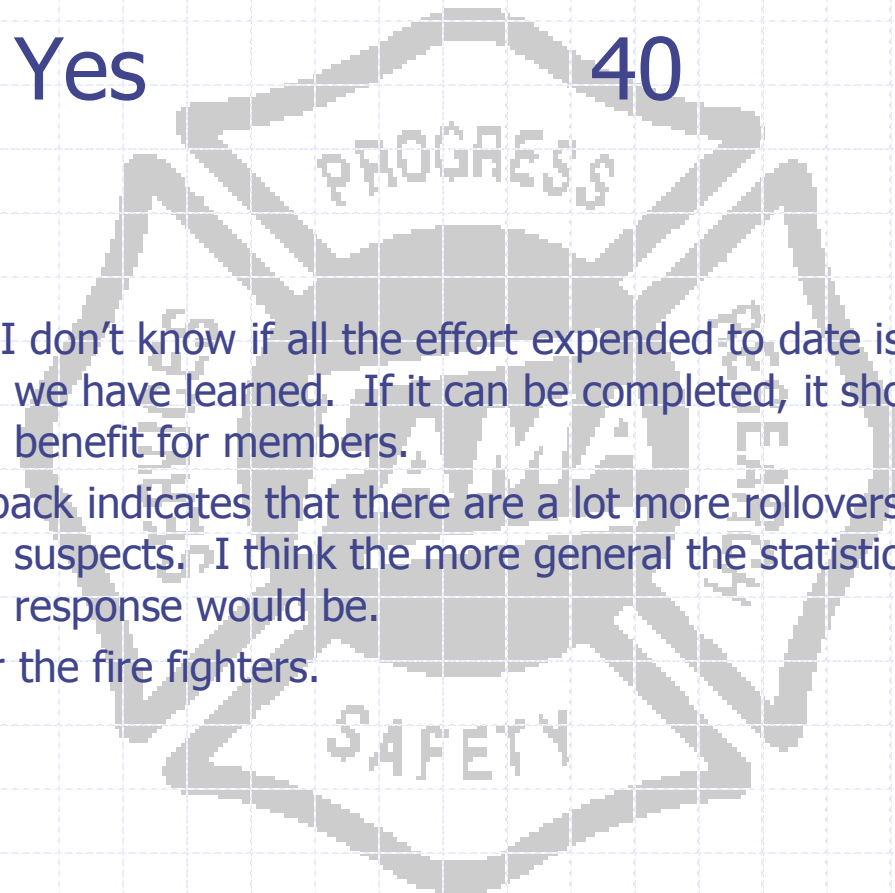
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Comments:

However I don't know if all the effort expended to date is justified by what we have learned. If it can be completed, it should be a good benefit for members.

Our feedback indicates that there are a lot more rollovers than anyone suspects. I think the more general the statistics, the better the response would be.

Safety for the fire fighters.



5. Rollover Collection — Do you feel it is important that FAMA continue to pursue efforts to collect accident information involving fire apparatus and tanker rollovers? (Cont'd)

No

15

Comments:

It would be nice if rollovers could be prevented, but no matter how much investigating we do, rollover accidents are going to happen.

There are so many possible causes: driver error, road conditions, other traffic, weather conditions to name a few.

Don't know

We should just pay for the statistics

It's not that common of an occurrence outside wildland.

The data that was collected seems to indicate that most accidents were due to improper handling of the equipment or speed of the vehicle.

NFPA Safety Committee already does an adequate job

No, because of all the variables. Each situation, roadway, conditions, speeds, truck designs, equipment load, driver training... is completely unique. I'm not really sure what the end goal is of this study.

5. Rollover Collection — Do you feel it is important that FAMA continue to pursue efforts to collect accident information involving fire apparatus and tanker rollovers? (Cont'd)

No

15

Comments:

We should discontinue. I feel it's the responsibility of the individual manufacturer to assure the product they built meets safety requirements.

In looking at known instances, the percentage seems to be small and driver related; there is no way to insure that questionnaire sent out would be answered in such a sensitive issue; many member companies are interested in "getting" the results of the survey but are very "protective" in sharing information that involved them in supplying information about rollovers. This is understandable and also defines one of the basic problems in FAMA doing the study. I sense that many are willing to share the pain of others, but not so anxious to do so about themselves. What is good for FAMA is not necessarily following good advice from a member company's legal counsel. Perceived and real conflict of interest.

6. How important do you feel it is that FAMA liaison with other organizations such as: (rate 1-5, with 5 being the most important)



FEMSA	(Fire & Emergency Manufacturers and Services Association)	3.8
FEMA	(Federal Emergency Management Agency)	3.9
FDSOA	(Fire Department Safety officers Association)	3.7
FDIC	(Fire Department Instructors Conference)	4.0
EVTCC	(Emergency Vehicle Technician Certification Commission)	3.6
IAFC	(International Association of Fire Chiefs)	3.8
NAEVT	(National Association of Emergency Vehicle Technicians)	3.5
NEEDA	(National Emergency Equipment Dealers Association)	2.5
NFPA	(National Fire Protection Association)	4.1
NTEA	(National Truck Equipment Association)	2.8
NAM	(National Association of Manufacturers)	2.4
AAM	(American Ambulance Manufacturers)	2.5

7. FAMA presently offers a Grant Fund of up to \$5,000 per year for the purposes of research and development. Do you feel it is important to maintain this fund?

Yes, at current level

35

Comments:

Maybe new format for ideas

Yes, at a reduced level (*specify*)

4

Comments:

\$2,000 (2)

\$2,500



7. FAMA presently offers a Grant Fund of up to \$5,000 per year for the purposes of research and development. Do you feel it is important to maintain this fund? (Cont'd)

No

15

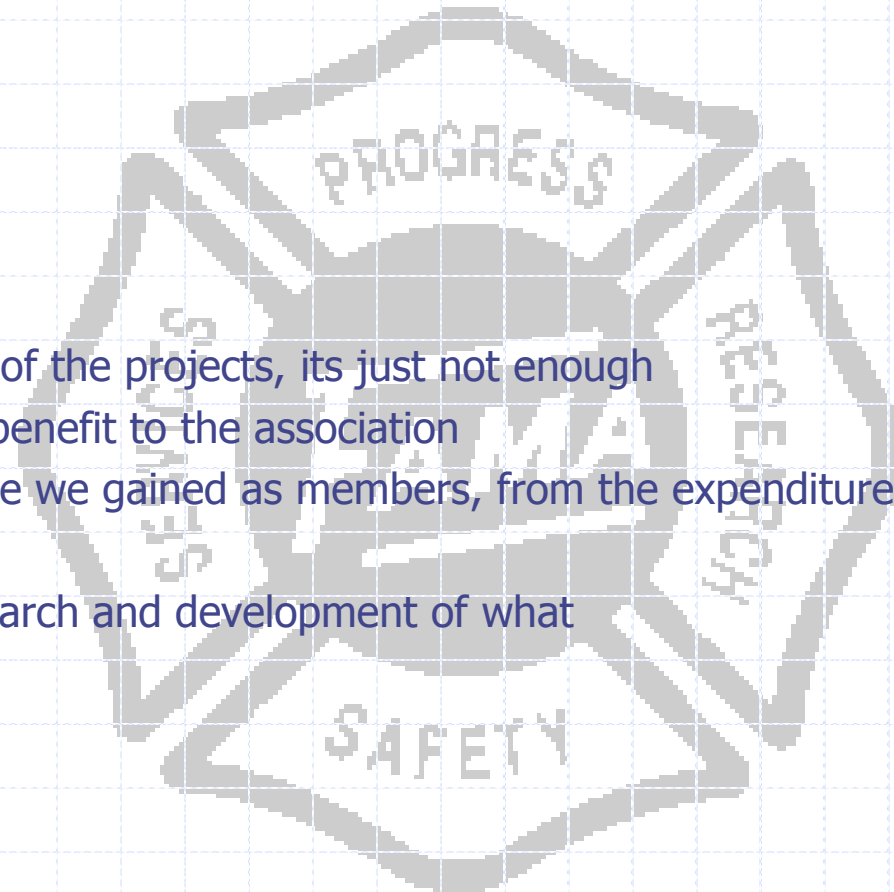
Comments:

For most of the projects, its just not enough

I see no benefit to the association

What have we gained as members, from the expenditures

Question: Research and development of what



8. FAMA presently provides a \$5,000 annual donation to the Congressional Fire Services Institute (CFSI) to support its Intern Program. Do you feel it is important to maintain this fund?

Yes, at the current level

43

Comments:

But needs better response from DFSI
Need – the only contact we have in DC

Yes, at a reduced level (*specify*)

4

Comments:

\$2,000 (2)
\$2,500
\$4,999

No

9

Comments:

Not sure what we get for it

9. Is there a specific area or topic that you believe FAMA should address?

Yes (if yes, please state:)

13

The ability of a fire truck to stop and some ways to make it better

Make sure that you keep Karen Happy

Keep the group together all evenings at the meetings even with a surcharge

Need more discussions on industry market trends

Get more truck manufacturers involved

EPA emissions on fire apparatus engines

Improve relations with government and other organizations serving the industry

Number of fire truck manufacturers attending meetings

On Governmental Affairs, we need specific agency or contact set up with GAC to give routine summaries. The objectives of this committee are so broad that it is difficult to do much else than summarize CFSI. It may be helpful to hire a consultant or attorney in Washington that reports to GAC for summaries each month to the membership. The legislation covered would be broader and more detailed.

9. Is there a specific area or topic that you believe FAMA should address? (cont'd)

Yes (if yes, please state:)

13

National fire department readiness for acts of terrorism

National law to exempt emergency vehicles from "over the road" overweight laws that vary from state to state

NFPA changes

More involvement in Washington, DC and how to do that

Development of system to inform FAMA member companies of fire departments that are going out for multiple truck bids and when they plan to do so

9. Is there a specific area or topic that you believe FAMA should address? (cont'd)

No

23

Comments:

We are not as involved in FAMA as I would like to see us. We hope that we can change this in the future. Lower meeting costs would help. The wage and sales surveys are great. One thing that I am not sure of a fix for is the work that is involved for departments to write grants. They all want to write grants for apparatus and that is great, however, they need full specifications and pricing to prepare their grant. This creates a tremendous amount of work for sales representatives and manufacturers in traveling to departments and producing specifications that will never be used beyond the grant application. Again, I am not sure of a fix, but this could be one item to be reviewed.