FIRE APPARATUS MANUFACTURERS' ASSOCIATION

FIRE APPARATUS MANUFACTURERS' ASSOCIATION

SPRING MEETING

PROGRESS
SERVICES
FAMA
RESEARCH
SAFETY

Imagine THE FUTURE

FAMA SPRING MEETING 2014

Call to Order

Opening Prayer

Imagine THE FUTURE

Imagine THE FUTURE

Opening Remarks

Board of Directors

Imagine THE FUTURE

Guests and Honourary Members

New Members & First Time Attendees

Imagine THE FUTURE

Roll Call

Proof of Notice

Review of Minutes

Imagine THE FUTURE

Anti-Trust/Non-Discrimination Policy

Chief Richard D. LePere, Jr.

Fire Marshal, Reedy Creek, FL

Sponsor Recognition

FIRE APPARATUS MANUFACTURERS' ASSOCIATION

SPRING MEETING

SPARTAN® CHASSIS

Saturday Welcome Reception Sponsor

Thank you for supporting FAMA!

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SPRING MEETING

UNITED PLASTIC FABRICATING

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WATEROUS

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RESEARCH
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SERVICES FAMA RESEARCH

SAFETY

IMMI®

imminet.com

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rosenbauer

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Meeting Signage Sponsor

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FAMA
RESEARCH
SAFETY

E-ONE®

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PROGRESS SERVICES FAMA RESEARCH SAFETY

AMDOR®

SPECIALTY ROLL-UP DOORS

Tuesday Coffee Break Sponsor

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FIRE APPARATUS MANUFACTURERS' ASSOCIATION

SPRING MEETING

PennWell FIRE GROUP™

Corporate Sponsor

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Imagine THE FUTURE

Self-Introduction of Members

Treasurer's Report

Treasurer's Report

SUMMARY OF 2013

Finished 2013 with a net surplus of $20,510

– Combination of slightly higher income and expenses under budget.

– Our Net Worth increased approximately 6%

January & February 2014 Comments

Profit and Loss, Budget vs Actual

- $40,000 Sponsorship Line Item was collected from PennWell Fire Group
- Membership dues were successfully collected *(Lost 4 Member Companies)*
  - Phenix Enterprises
  - Southern Fire Service & Sales
  - Williams Fire & Hazard
  - E.S. Safety Systems
- All Spring Meeting Sponsorships were sold and will be reflected in Q1 report
- Expenses seem to be in line with expectations or below.

Imagine THE FUTURE

January & February 2014 Comments

Balance Sheet

- FAMA is required to maintain in reserves 50% of previous year's expenses
- $157,725.38 has to stay in reserves
- This is somewhat of a moot point as FAMA is financially sound and has appropriate funding for current business

Board of Directors' Report

Imagine THE FUTURE

BOARD OF DIRECTORS

Since last update at the Fall Meeting:

- Board met twice in person; November and March
- Board met 4 times via conference call
- November sessions focused on strategic planning

Imagine THE FUTURE

BOARD OF DIRECTORS

2014 Focus

- Building the FAMA brand
- Member Engagement through meeting effectiveness
- Continue enhancing areas that add value for our members, specifically:
  - Statistics
  - Technical
  - GAC

BOARD OF DIRECTORS

Special thanks to:

- Harold, Phil, Dave, Scott, Steve and Curt

BOARD OF DIRECTORS

Special thanks to:

- Harold, Phil, Dave, Scott, Steve and Curt
- Jim Juneau

BOARD OF DIRECTORS

Special thanks to:

- Harold, Phil, Dave, Scott, Steve and Curt
- Jim Juneau
- Committees

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- Committees
- Sponsors

BOARD OF DIRECTORS

Special thanks to:

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- Jim Juneau
- Committees
- Sponsors
- Karen Burnham

BOARD OF DIRECTORS

Accomplishments to celebrate:

- Effective Hill Days
- Great meetings (and getting better)
- Enhanced Stats including timely reporting
- Active Technical Committee including the new Fire Apparatus Safety Guide
- Engaged Marketing Committee
- Education Committee Survey and Scholarship program
- Sound financial health

Imagine THE FUTURE

BOARD OF DIRECTORS

In a time of transition:

BOARD OF DIRECTORS

In a time of transition:

- Karen Burnham announced her intention to retire

BOARD OF DIRECTORS

In a time of transition:

- Karen Burnham announced her intention to retire
- Bob Grimaldi has announced his retirement

BOARD OF DIRECTORS

In a time of transition:

- Discuss:
    - organizational models

BOARD OF DIRECTORS

In a time of transition:

- Discuss:
  - organizational models
  - value add programs; Membership Meetings, Stats, Marketing, GAC

BOARD OF DIRECTORS

In a time of transition:

- Discuss:
    - organizational models
    - value add programs; Membership Meetings, Stats, Marketing, GAC
    - associated costs

BOARD OF DIRECTORS

In a time of transition:

- Discuss:
  - organizational models
  - value add programs; Membership Meetings, Stats, Marketing, GAC
  - associated costs

- We need your input

BOARD OF DIRECTORS

Great meeting content and I am looking forward the next two days together

Committee Reports

Statistics Committee

Imagine THE FUTURE

STATISTICS

Committee Members

- Jack McLoughlin – Chairman
- Don Fischel – Co-chair
- David Durstine – Board Liaison

Currently seeking new members!

STATISTICS

Need more apparatus manufacturer participants!

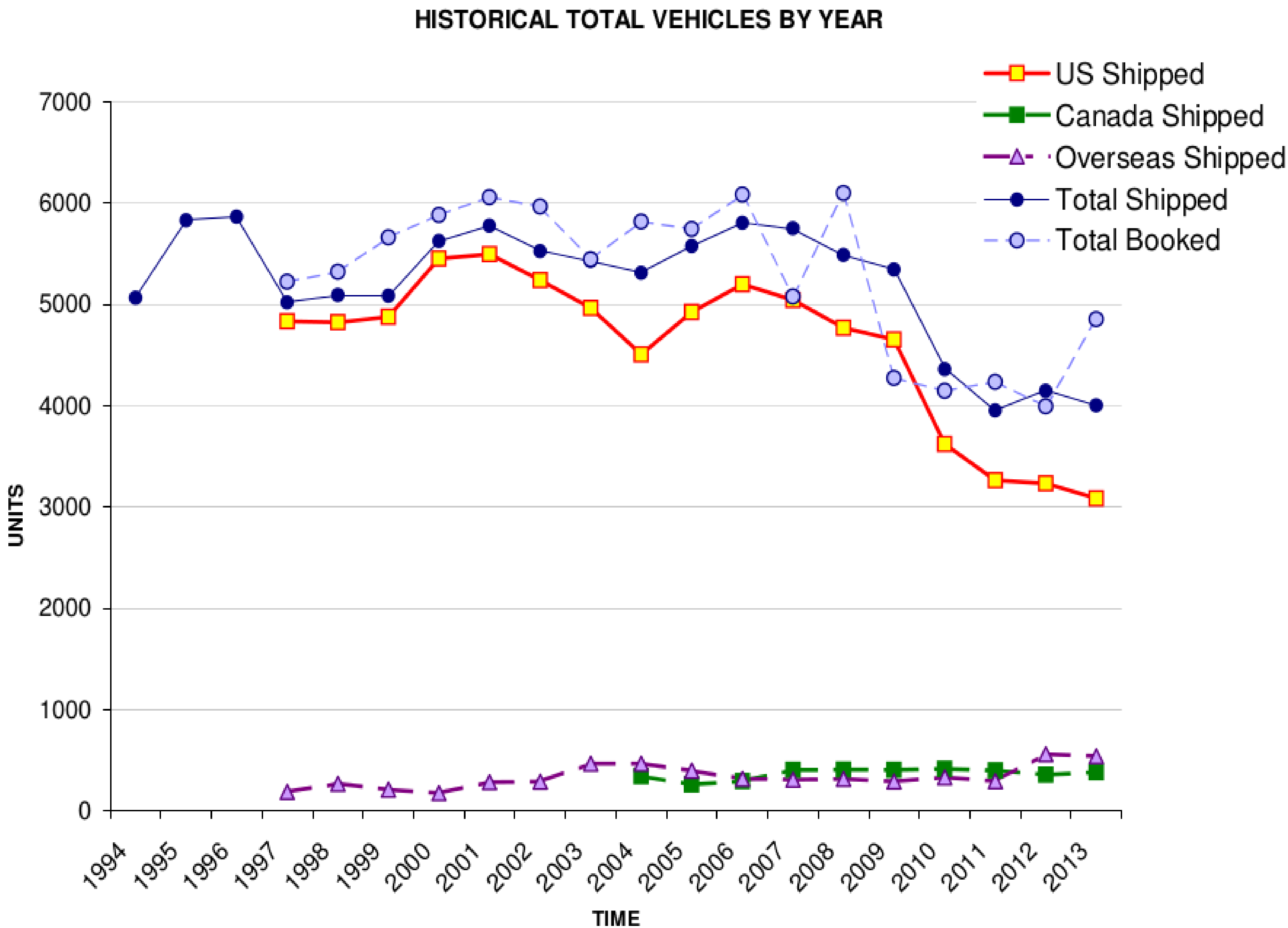
- Currently 34 participating members (this includes all the major manufacturers)
- Estimated > 75 apparatus builders in US and Canada, though most are very small

We want to include all of them!

STATISTICS

As you can see on the graphs that Nate made, bookings for 2013 were up by 22%. While actual shipments were down by 4%, pump shipments were down by 18%.

Believe the declines were caused by the lack of backlog in the beginning of the year. The good news is that the positive trend of increased booking seems to be continuing.



HISTORICAL TOTAL VEHICLES BY YEAR
US Shipped
Canada Shipped
Overseas Shipped
Total Shipped
Total Booked
7000
6000
5000
4000
3000
2000
1000
0
UNITS
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
TIME

STATISTICS

Everyone wants to know what bookings will be for the rest of the year and also in 2015.

Paul Darley, who has an extensive background in this area, forwarded copies of the National League of Cities Research Briefs.

STATISTICS

This brief outlined the financial status of American cities in October 2013.   The results of this study were as follows:

1. 72% of the cities' financial officers reported they were better off now financially than in 2012
2. There was an increase in general fund revenues, the first in 7 years
3. Sales tax and local income tax revenues were up
4. They are building up financial reserves again

STATISTICS

Together with this financial data from the cities, which is obviously a great resource for our industry, we must also consider the fact that many locales have not bought apparatus for a few years.

They also have too many old vehicles that cannot do the job. These facts should add up to a good year. The general consensus of 5 truck manufacturers we have spoken with is that if the economy holds up, 2015 will be a good year also.

STATISTICS

Phil Gerace has spent considerable time and effort to obtain a firm to upgrade and maintain our statistics.

Phil will give you the results of that effort.

STATISTICS

Statistics Shipped Data Tool

- Nate Berry of FRC downloaded the data (like any FAMA member can do)
- Created a (password protected) web form for members to explore the data interactively

STATISTICS

Statistics Shipped Data Tool

- Prototype page with some limited tools
- Password protected

  `fireresearch.com/fama`

  user: **famastats**

  password: **membersonly12**

If you have Internet, try it now!

FIRE APPARATUS MANUFACTURERS' ASSOCIATION

fireresearch.com/fama/

FAMA statistics Shipped Data 2004-2011

Choose from the options below and click submit.

Start over

All Vehicle Classes | All Chassis Types

All Pump Types | All Areas

2011-01-01 Oldest Ship Date (Defaults to Jan 1, 2011)

2012-09-11 Recent Ship Date (Defaults to today)

- [x] Plot US map
- [ ] Plot Canadian map
- [ ] Plot line graph of units by month [x] or by quarter

Submit

Selections - scroll down for maps and table.

(% indicates ALL of that type)

Vehicle Class: **%**
Chassis Type: **%**
Pump Type: **%**
State: **%**
Selected Dates between: **2011-01-01** and **2012-09-11**
There are 4773 rows in the database.
for a total of **5028** vehicle(s)

Make selections

Pick one or more graphs to show

Your selections shown here (in case you forget!)

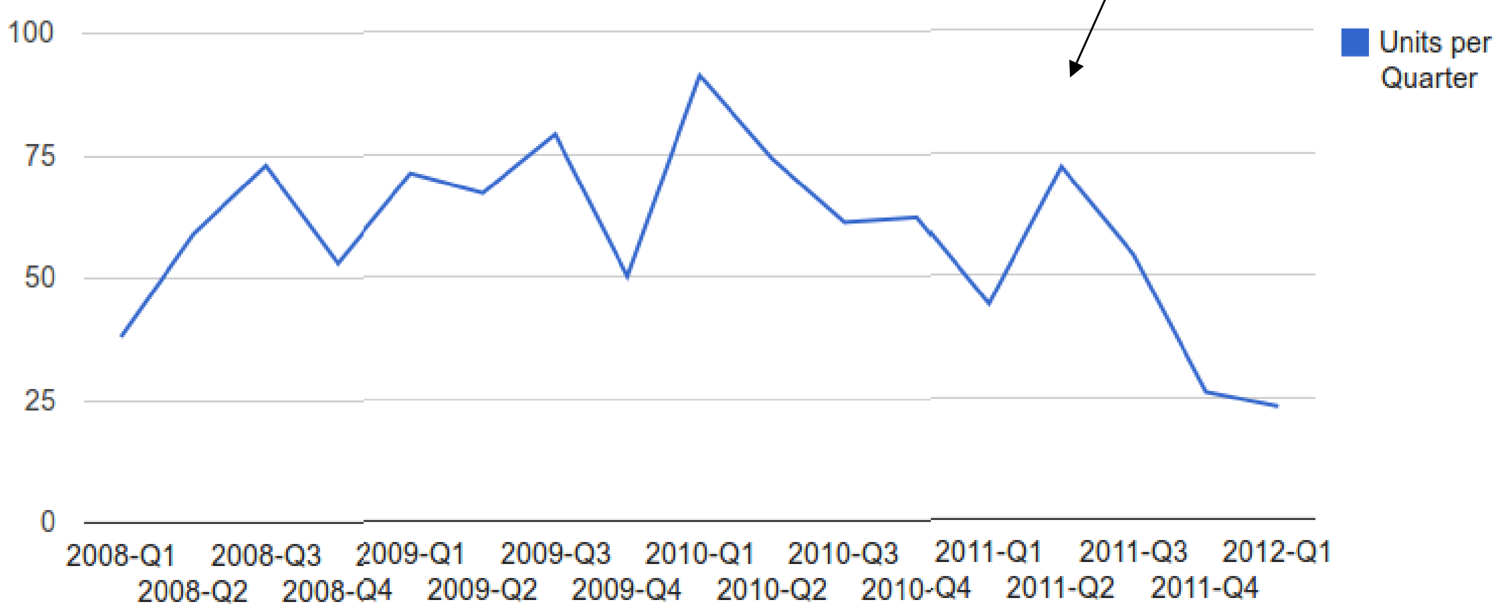
Graphs Appear below

STATISTICS

Selections - scroll down for maps and table.
(% indicates ALL of that type)

Vehicle Class: **ARFF**
Chassis Type: **%**
Pump Type: **%**
State: **%**
Selected Dates between: **2008-01-01** and **2012-09-11**
There are 970 rows in the database.
for a total of **997** vehicle(s)

This graph shows all ARFF trucks shipped by Quarter between Jan 1, 2008 and 3rd Qtr 2012

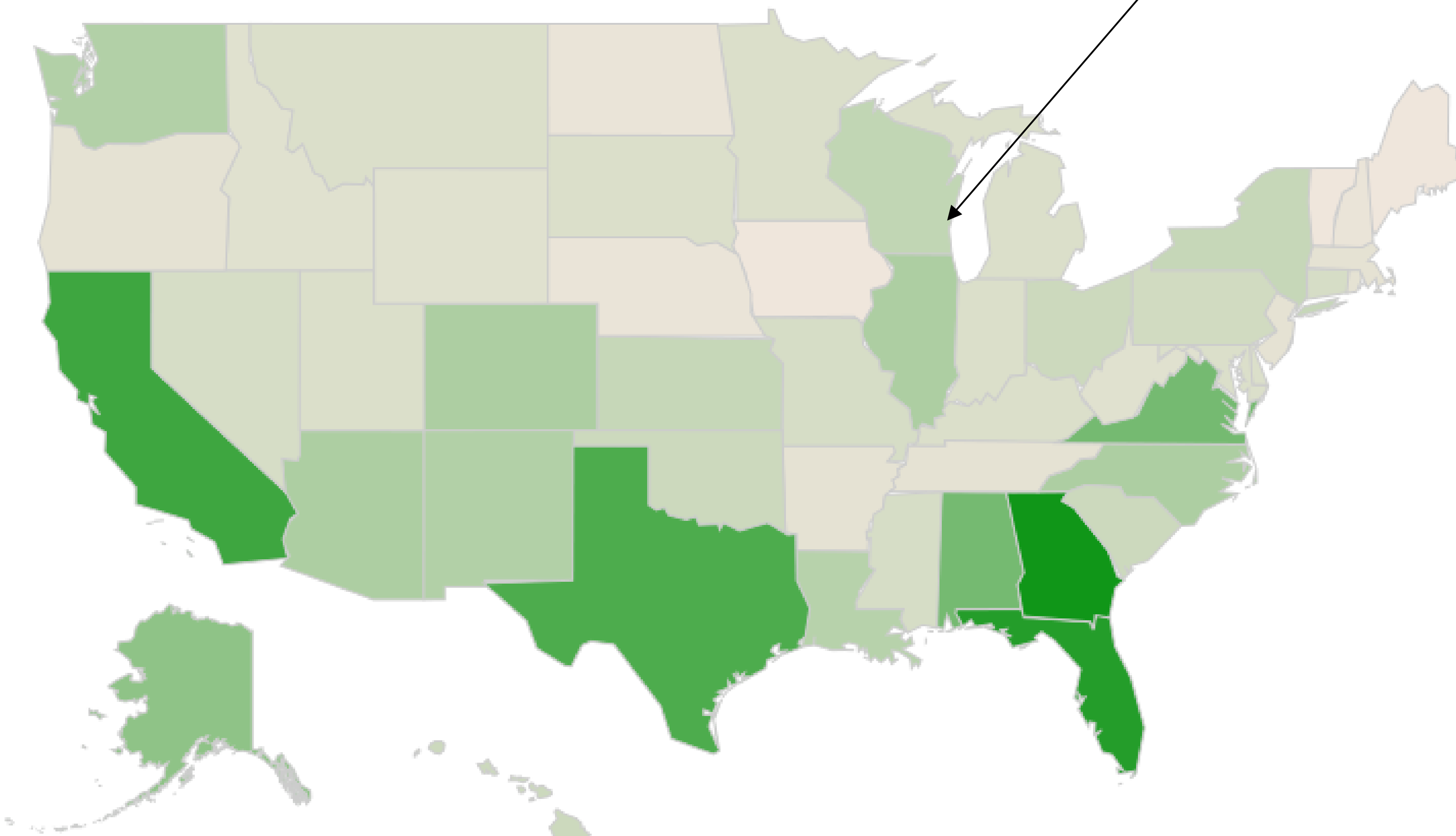


Selections - scroll down for maps and table.
(% indicates ALL of that type)

Vehicle Class: **ARFF**
Chassis Type: **%**
Pump Type: **%**
State: **%**
Selected Dates between: **2008-01-01** and **2012-09-11**
There are 970 rows in the database.
for a total of **997** vehicle(s)

The same data plotted on a map of the US.

Hover over a state For the actual value.



STATISTICS

Search by groups of vehicle classes, chassis & pump types!

All Vehicle Classes

- All Vehicle Classes
- All Aerials
- All ARFF
- All Brush Trucks
- All Refurbished
- All Pumpers
- All Rescues
- ------------
- Aerial Ladder waterway 0-94 Mid
- Aerial Ladder waterway 0-94 Rear
- Aerial Ladder waterway 95 + Mid
- Aerial Ladder waterway 95 + Rear
- Aerial Platform, 0-85 Mid
- Aerial Platform, 0-85 Rear
- Aerial Platform, 86 + Mid
- Aerial Platform, 86 + Rear
- Aerial Platform, Articulating
- ARFF Class 3 (500 gallons)
- ARFF Class 4 (1500 gallons)
- ARFF Class 5 (>3000 gallons)

All Chassis Types

- All Chassis Types
- All Custom Chassis
- All Commercial Chassis
- All High Torque Trans
- All Low Torque Trans
- ------------
- Commercial, High Torque Trans 1251+ ft/lbs
- Commercial, Low Torque Trans 0-1250 ft/lbs
- Custom, High Torque Trans 1251+ ft/lbs
- Custom, Low Torque Trans 0-1250 ft/lbs

All Pump Types

- All Pump Types
- All Front mounts
- All Mid mounts
- All Rear mounts
- ------------
- All up to 1000 gpm
- All 1250 to 1750 gpm
- All 2000+ gpm
- ------------
- 1250 to 1750 gpm Front
- 1250 to 1750 gpm Mid
- 1250 to 1750 gpm Rear
- 2000 + gpm Front
- 2000 + gpm Mid
- 2000 + gpm Rear
- None
- Up to 1000 gpm Front
- Up to 1000 gpm Mid
- Up to 1000 gpm Rear

Imagine THE FUTURE

Education Committee

EDUCATION

Committee Members:

- Jeff Hupke – Co-Chair
- Lou Milanovich – Scholarship

Education Committee Survey Reports

- Successful survey completions rates for 2013-2014 surveys!
  - Industry Survey [1,500+ completed]
  - Member Survey [71 completed]
  - The industry publications and organizations really stepped up again this year to help. Special thanks to IAFC, NVFC, Penwell, Fire House (Cygnus), Fire News, and Fire Fighting in Canada

FAMA/FEMSA Annual Industry Survey Report for 2013

(Completed February 2014)

Geography of respondents [94% from US, 6% from Canada, All 50 states and all Canadian provinces represented]

Pacific West–9%
West–5%
Central–12%
Mid West–21%
Mid South–10%
Southeast–10%
Mid Atlantic–24%
North East–6%

Position of respondents [42% were either Chiefs or other officers]

Fire chief/commissioner	22%
Company officer	20%
Firefighter/driver/operator	20%
Assistant Chief	12%
Training officer/training chief	7%
Battalion Chief	4%
EMT/paramedic	3%
Other	12%

Imagine THE FUTURE

Trends affecting the industry [Respondents were asked to provide their thoughts on trend in the industry. Their thoughts were grouped into categories.]

Economy/finances/lack of funding/affordability	31%
Reduced manpower/lack of volunteers/down membership	16%
Staffing/24-hour shifts/part-time/attendance/daytime	10%
Cost/apparatus replacement/purchase/upgrade	9%
Training requirements/training/accreditation	6%
Handling EMS/recordkeeping/data	5%
Recruitment & retention	5%
Technology/communication/change in /social media	5%
Standards/NFPA/policies/regulations	4%
Do more with less/increase in services/call volume	4%
Apparatus size/aging fleet/wearing out	3%
Safety/prevention	3%
Youth culture/lack of experience/apathy/morale	3%
Other	15%

Imagine THE FUTURE

Anticipated actions due to the economic conditions [Respondents were asked what actions they would take.]

	2013 (n=303)	2012 (n=2,005)	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Standard operating procedures will change	35%	32%	46%	21%	29%
No anticipated actions due to economic conditions	33%	27%	Not asked	Not asked	Not asked
Postpone planned purchases	32%	40%	Not asked	62%	66%
Reduce number of planned purchases	30%	36%	Not asked	54%	58%
Refurbish existing apparatus	20%	26%	35%	32%	21%
Reduce staff	16%	13%	19%	26%	24%
Fees for service levied	15%	15%	18%	15%	26%
Cancel planned purchases	4%	6%	Not asked	31%	25%
Forced to acquire non-NFPA compliant apparatus	3%	6%	7%	5%	3%
Other	4%	4%	31%	14%	10%

Anticipated trends over the next two years:

	Equipment Budget			Apparatus Budget			Staffing Budget
	2013 (n=1,322)	2012 (n=2,005)	2011 (n=225)	2013 (n=1,480)	2012 (n=2,005)	2011 (n=225)	2013 (n=1,480)
Increase	27%	24%	27%	26%	22%	27%	28%
Stay the same	55%	58%	53%	57%	61%	51%	60%
Decrease	18%	19%	20%	17%	18%	22%	13%

Federal Grant info:

(Has your department applied for a grant during the last two years?)

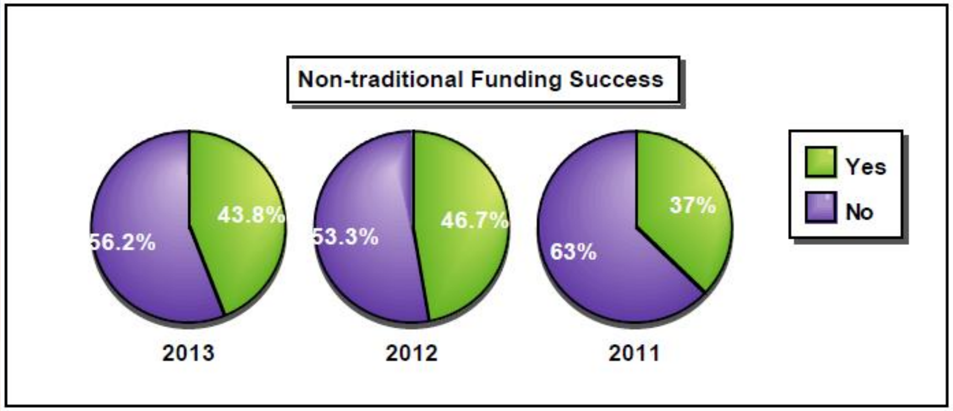
	2013 (n=1,280)
Yes, for apparatus	32%
Yes, for equipment	66%
Yes, for staffing	17%
Yes, for other	17%
No	17%
Not sure	8%

(Have you received an AFG or SAFER grant during the last two years?)

	2013 (n=1,280)
Yes, for apparatus	3%
Yes, for equipment	19%
Yes, for staffing	8%
Yes, for other	4%
No	62%
Not sure	11%

Funding: [Respondents were asked how their budgets were funded and if non-traditional methods were successful.]

	Equipment Budget			Apparatus Budget		
	2013	2012	2011	2013	2012	2011
Tax revenue	77%	76%	66%	77%	75%	54%
Fundraising	18%	19%	8%	19%	20%	6%
Municipal bonds	9%	9%	4%	24%	23%	9%
Grants	13%	14%	8%	16%	18%	8%
Other	20%	18%	3%	24%	20%	3%



Department trends (we asked about last two years):

Staffing Levels	2013 (n=1,480)	2012 (n=1,935)	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Increased	23%	22%	21%	19%	27%
Stayed the same	50%	53%	51%	54%	51%
Decreased	27%	25%	27%	27%	23%

Equipment Budgets	2013 (n=1,322)	2012 (n=1,935)	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Increased	22%	20%	21%	16%	19%
Stayed the same	53%	54%	48%	37%	44%
Decreased	25%	26%	31%	47%	37%

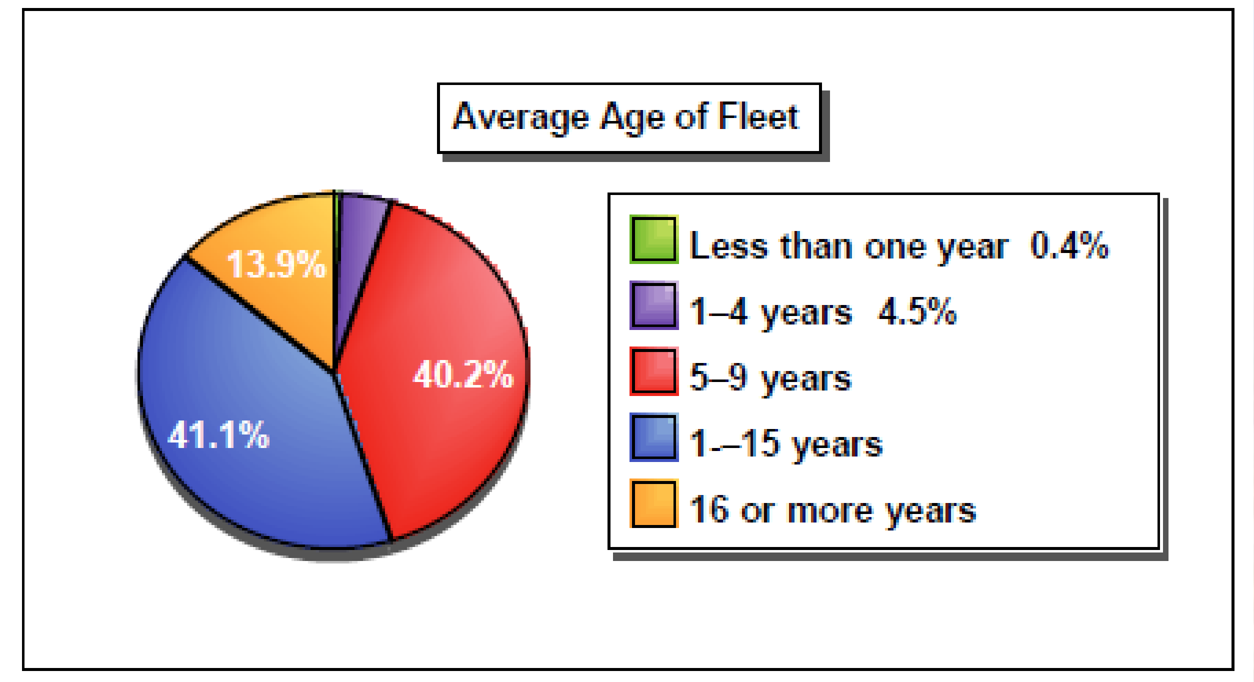
Apparatus Budgets	2013 (n=1,480)	2012 (n=1,935)	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Increased	22%	20%	22%	19%	19%
Stayed the same	58%	58%	54%	42%	45%
Decreased	19%	23%	24%	40%	36%

This year we asked if departments had changed apparatus specifications/selection due to cost or budget restrictions?

Yes, chose a different, new apparatus	26%
Yes, replace with a used vehicle	13%
Yes, other options	17%
No	44%

Imagine THE FUTURE

Average Age of Fleet:



Major purchases: Do you anticipate making a major purchase in the next year and what do you expect to purchase?

	2013 (n=1,537)	2012 (n=2,005)	2011 (n=225)	2010 (n=81)
Yes	40%	40%	56%	37%
No	36%	33%	30%	32%
Not sure	24%	28%	14%	31%

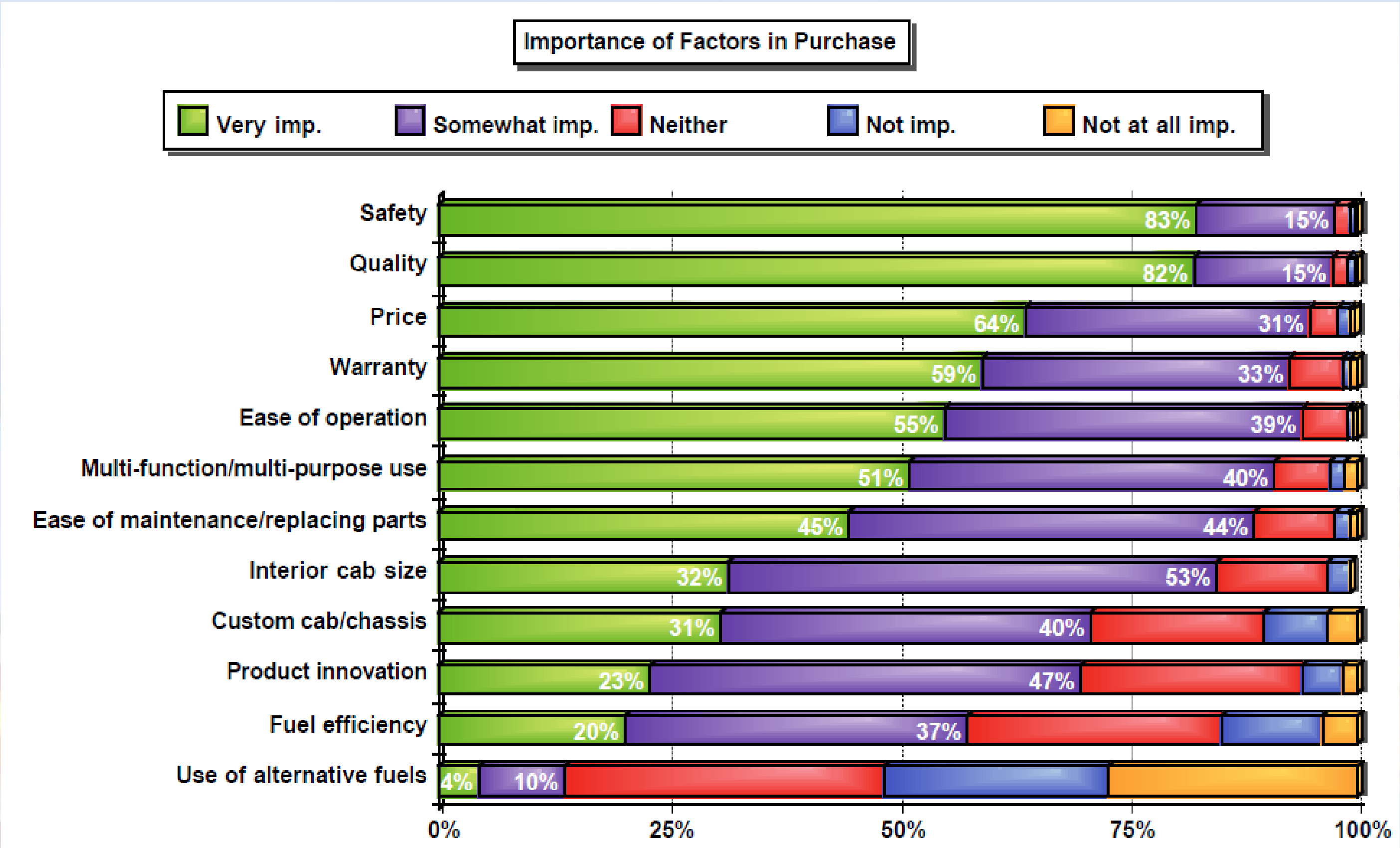
	2013 (n=607)	2012 (n=769)	2011 (n=127)
Apparatus	92%	92%	81%
Equipment	67%	76%	77%
Training	40%	44%	46%
Computer hardware/software	33%	36%	47%
Fire station furnishings	26%	25%	31%
Fire station	19%	---	21%
Other	1%	---	---

Imagine THE FUTURE

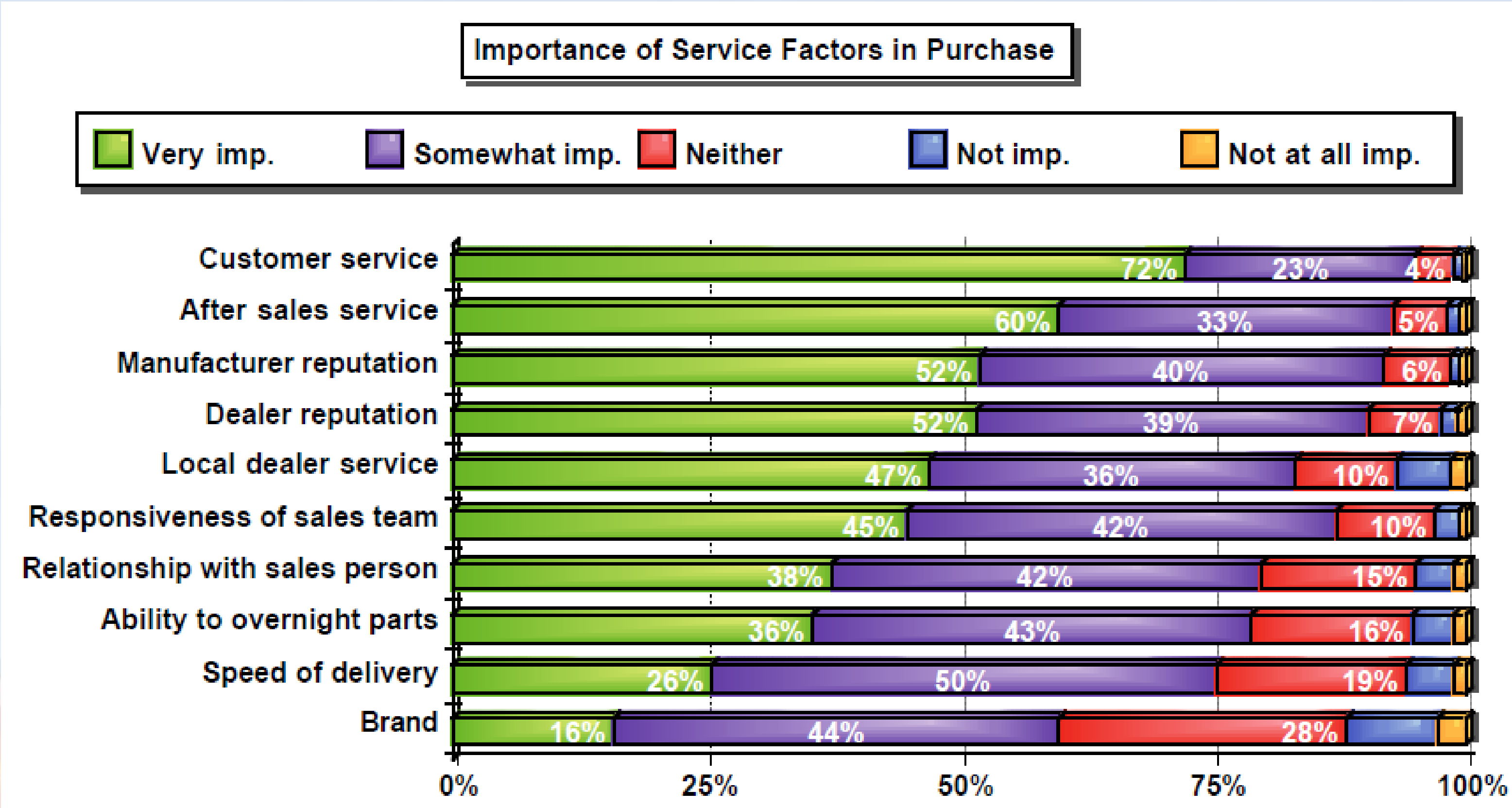
Major purchases: What apparatus does your department anticipate purchasing in the next two years?

	2013 (n=441)	2012 (n=614)	2011 (n=225)
Pumper	57%	56%	56%
Aerial	23%	23%	5%
Ambulance transport	18%	18%	20%
Rescue	12%	14%	14%
Wildland	8%	10%	13%
Utility truck	8%	7%	13%
Heavy rescue	6%	7%	7%
Command center	2%	2%	4%
ARFF (Airport Rescue Firefighting)	2%	2%	3%
Tanker	---	---	10%
Other	17%	15%	28%

Important factors in Apparatus/Equipment purchase decision:



Service Factors: How important are the following service/manufacturer attributes in the purchase of a new apparatus?



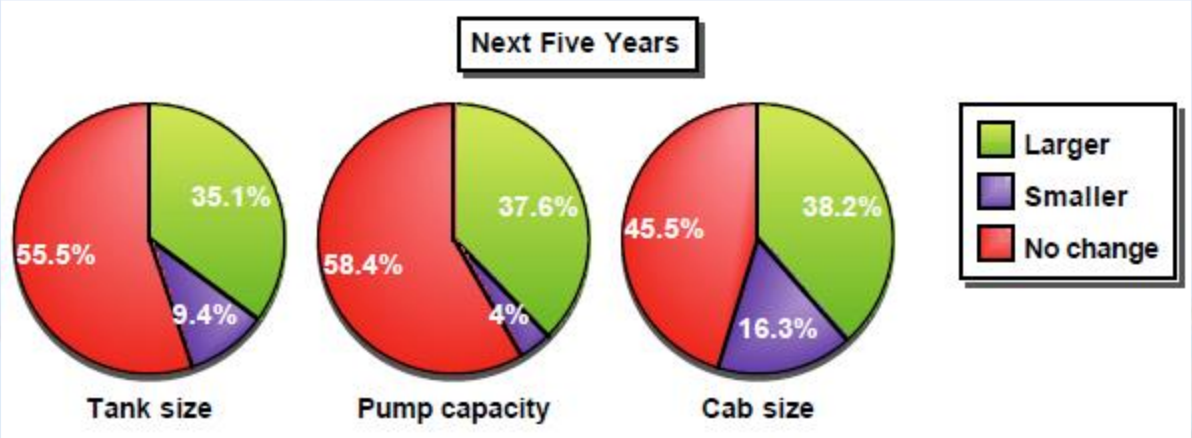
Imagine THE FUTURE

Service Factors: How important are the following service/manufacturer attributes in the purchase of a new apparatus?

Results from this study mirror those of last year's study.

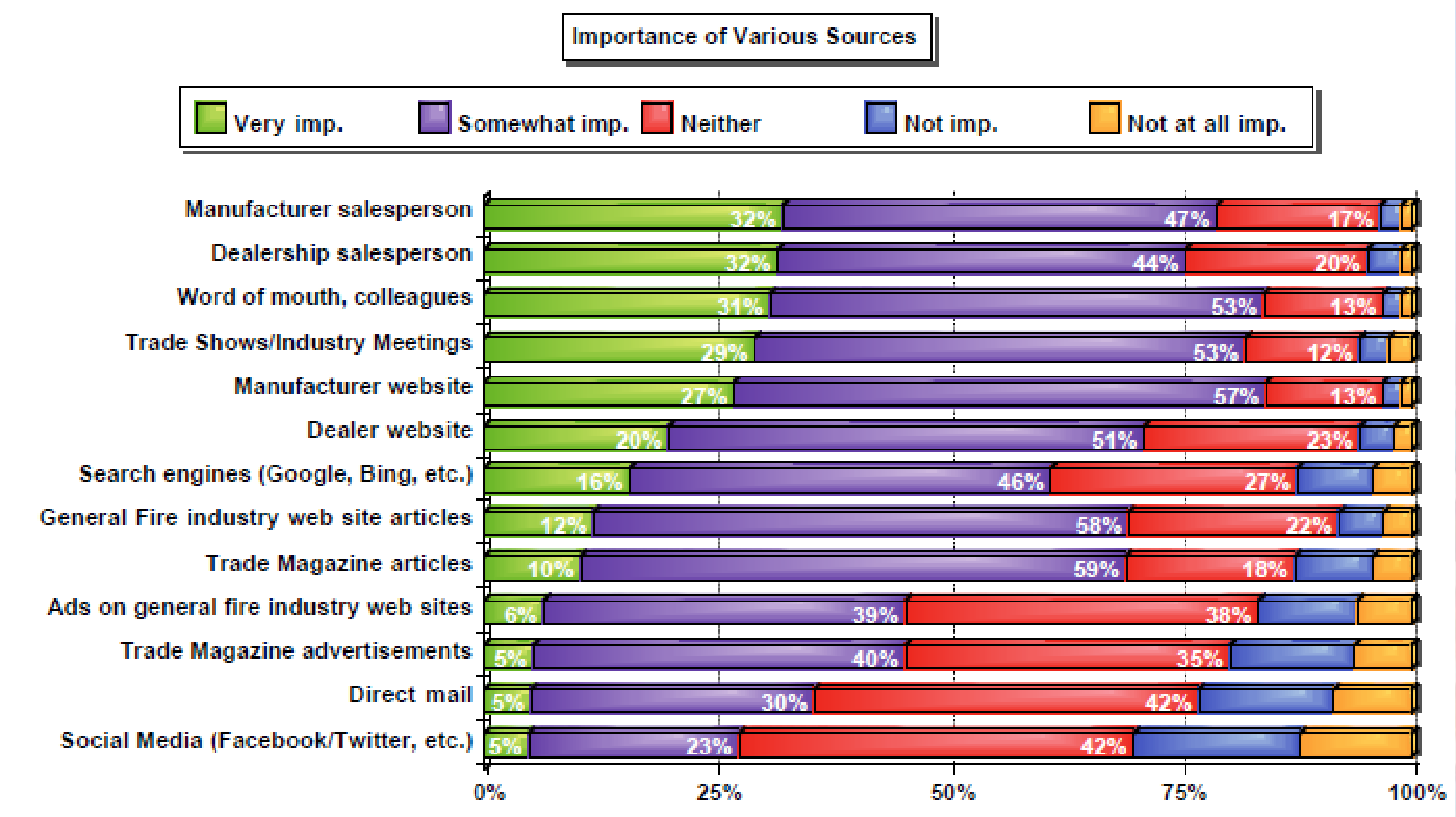
Mean average, 5=very important and 1=not at all important	2013 (n=1,535)	2012 (n=2,002)
Customer service	4.7	4.7
After sales service	4.5	4.5
Dealer reputation	4.4	4.4
Manufacturer reputation	4.4	4.4
Responsiveness of sales team	4.3	4.3
Local dealer service	4.2	4.3
Ability to overnight parts	4.1	4.1
Relationship with sales person	4.1	4.2
Speed of delivery	3.9	4.0
Brand	3.6	3.6

Future Trends: We asked respondents what will be changing over the next five years?

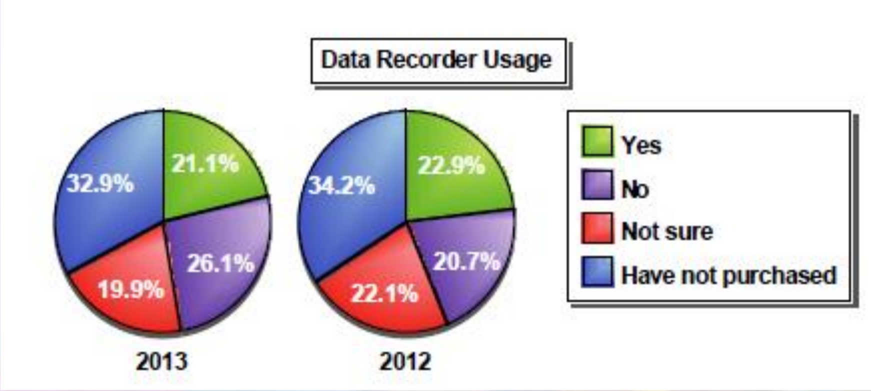


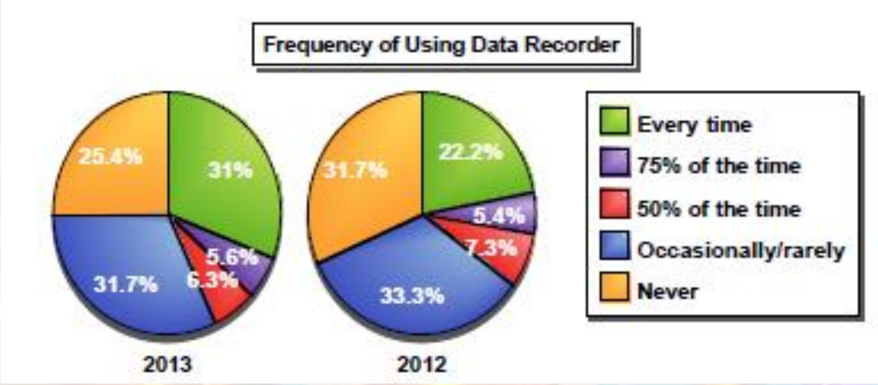
Patient Transport Capability	Yes–22%	No–6%	No change–71%
Compartments	More–63%	Less–9%	No change–28%
Chassis	Custom–51%	Commercial–27%	No change–23%

Importance of sources: We asked respondents to rate the importance of the following information sources?

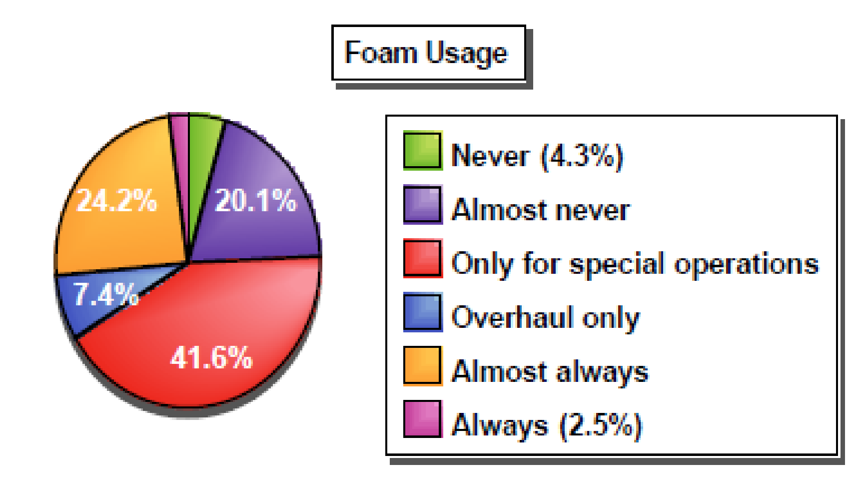


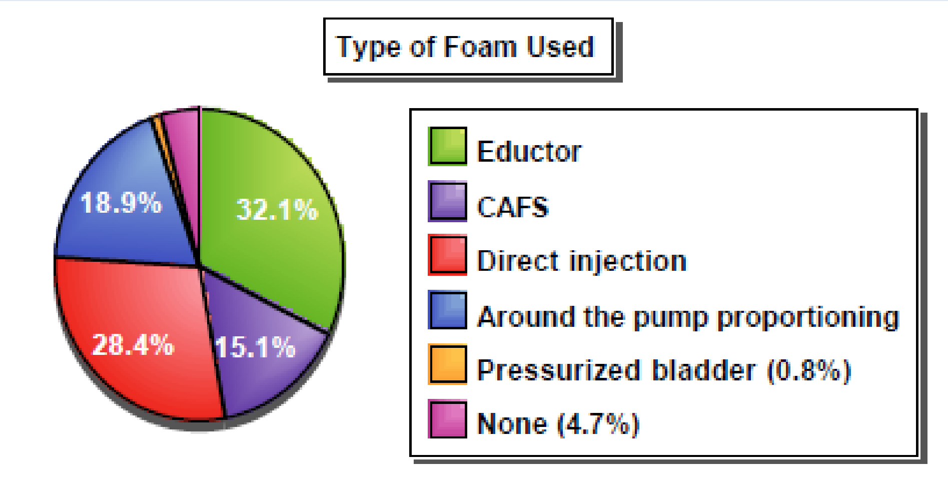
Data Recorder: We asked respondents who have purchased a new vehicle since 2009 if they have used the data reorder and how often they used it.



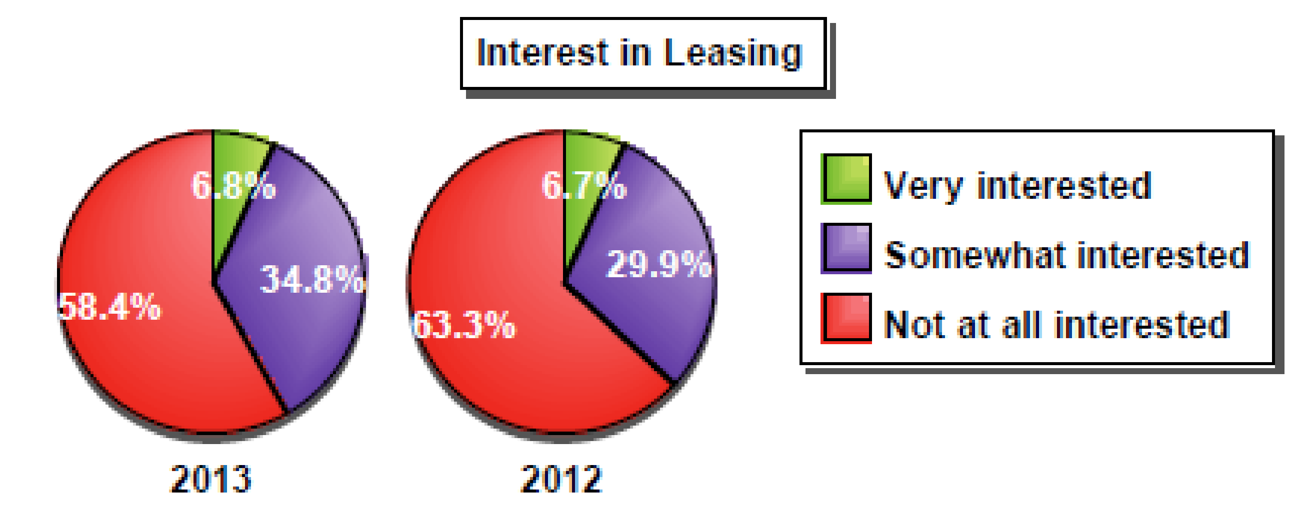


Foam Systems: We asked respondents about their foam usage and preferences.





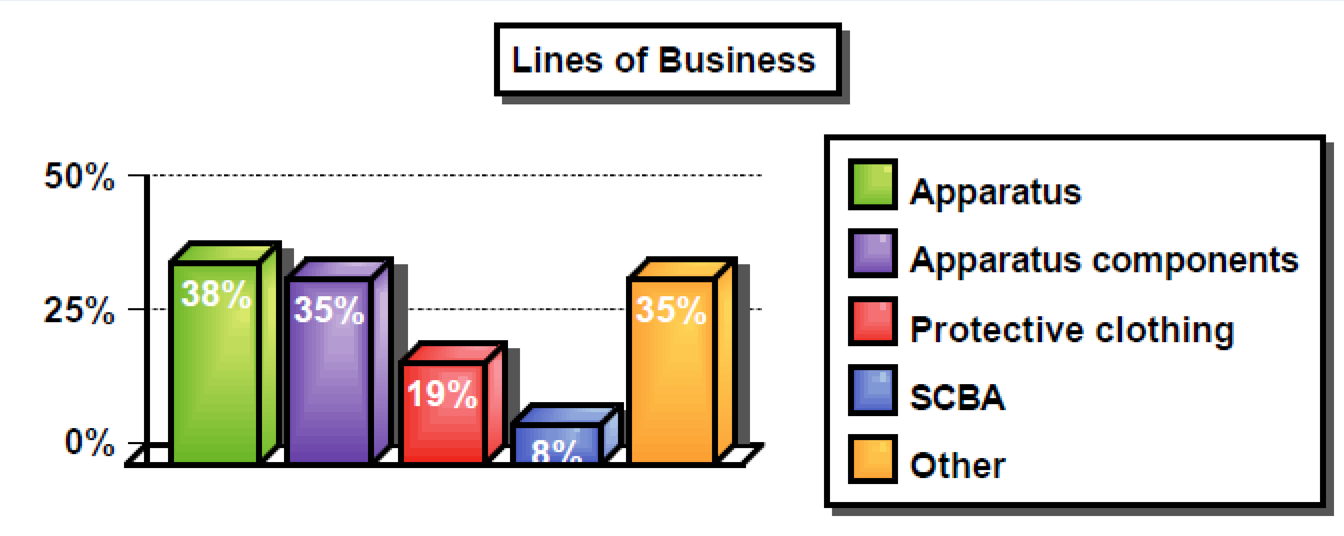
Leasing: We asked respondents about their interest in leasing from manufacturers.



FAMA/FEMSA Annual Member Survey Report for 2013

(Completed February 2014)

What line(s) of business are you in?



Where is your primary business?

Midwest US	32%
Northeast US	23%
Southeast US	19%
Western US	21%
Canada	10%
Other	13%

What are the biggest trends affecting your business?

Economy/budget cuts/lack of funding/grants	41%
International/exchange rates	11%
Competition/more manufacturers	8%
Cost/reduced spending/finances	8%
Do more with less/refurbish/smaller	8%
Consolidation/group purchasing/co-op	8%
Healthcare costs/Obamacare	6%
Gov regulations	5%
Staffing issues/less staffing	3%
Recruitment & retention/lack of quality employees	3%

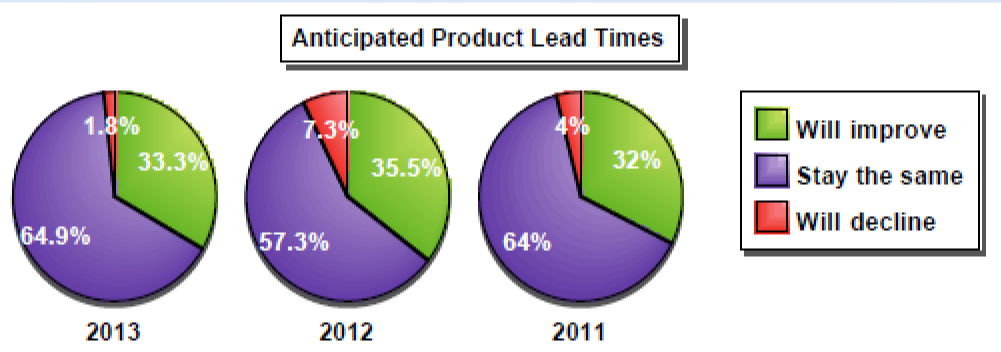
Business Change:

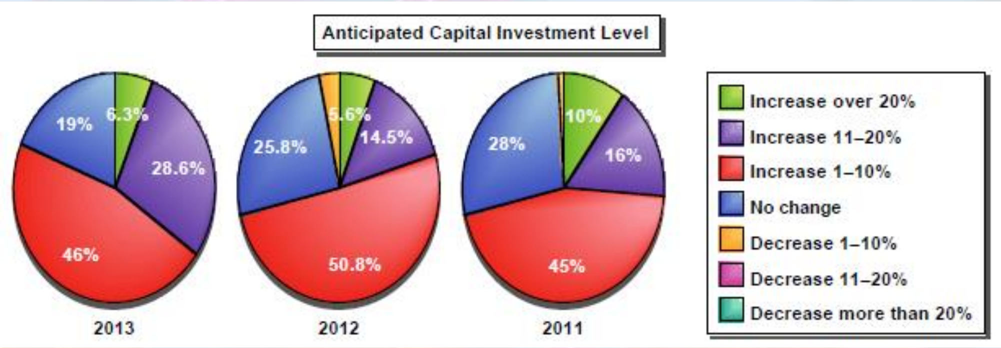
How do you expect your business to change over next year/next three years?

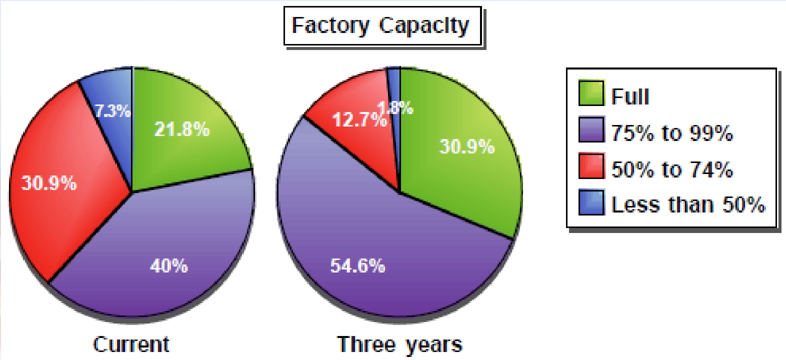
	Current			Three years		
	2013 (n=70)	2012 (n=136)	2011 (n=92)	2013 (n=70)	2012 (n=136)	2011 (n=92)
Increase over 20%	7%	6%	9%	20%	18%	17%
Increase 11–20%	14%	11%	13%	43%	31%	37%
Increase 1–10%	53%	47%	42%	29%	41%	39%
No change	21%	29%	24%	7%	6%	4%
Decrease 1–10%	3%	5%	12%	0%	3%	2%
Decrease 11–20%	1%	2%	0%	1%	<1%	0%
Decrease more than 20%	0%	0%	0%	0%	0%	0%

Imagine THE FUTURE

Lead Times, Capital Investment & Capacity:

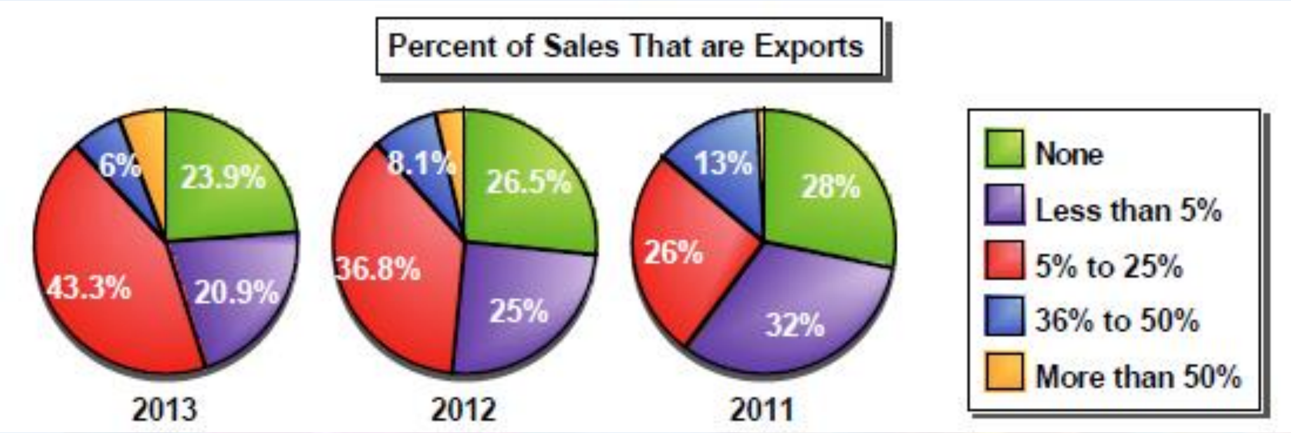


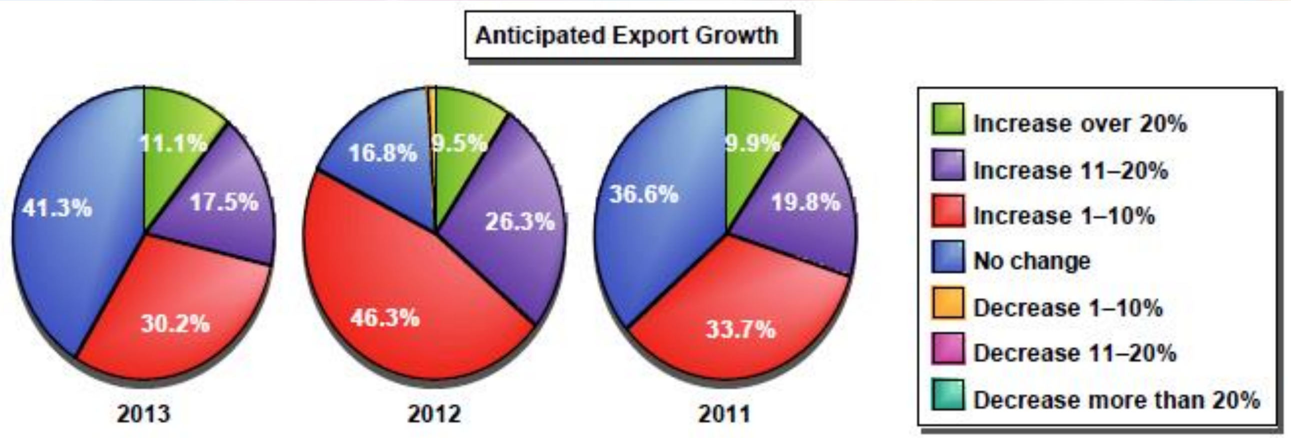




Imagine THE FUTURE

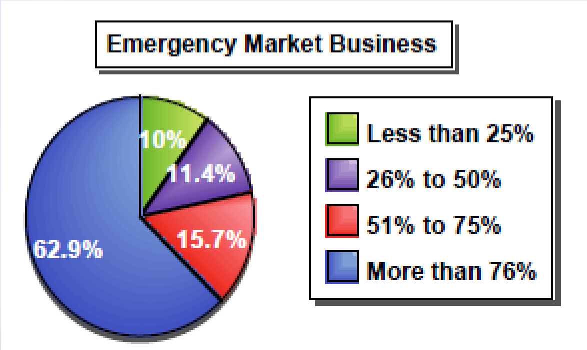
Export Sales – Current state and three year expectations:



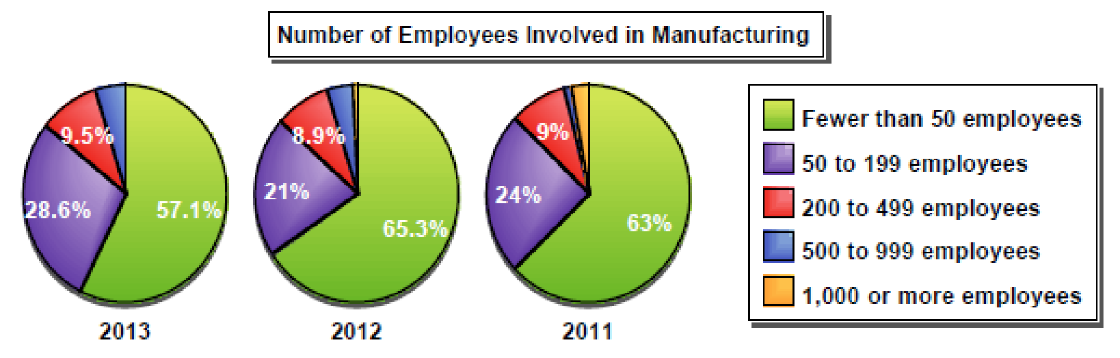


Employment:

What percentage of your business is emergency market related?



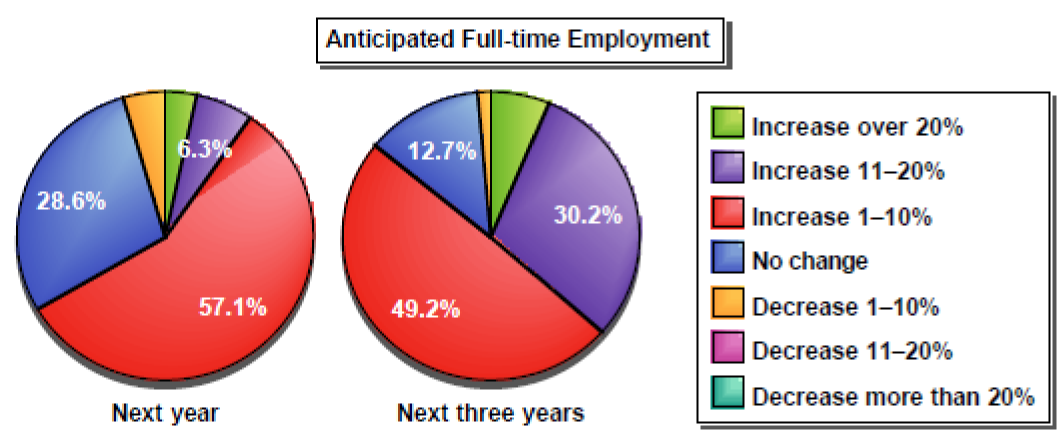
How many of total employees at your company are involved in fire apparatus or equipment manufacturing?



Imagine THE FUTURE

Employment:

What is your planned full-time employment for next year/next three years?



How have employment expectations changed over the last few years?

	2013 (n=63)	2012 (n=92)	2013 (n=63)	2012 (n=92)
Increase over 20%	3%	0%	6%	2%
Increase 11–20%	6%	5%	30%	15%
Increase 1–10%	57%	44%	49%	56%
No change	29%	48%	13%	21%
Decrease 1–10%	5%	3%	2%	5%
Decrease 11–20%	0%	0%	0%	0%
Decrease more than 20%	0%	0%	0%	0%

Imagine THE FUTURE

Concerns: *How concerned are you about each of the following issues (second chart compares to LY)?*

	Keeps me up at night (5)	(4)	(3)	(2)	This does not impact my business (1)
Health care costs	31%	39%	19%	7%	3%
Insurance costs	29%	37%	24%	7%	3%
Funding/budgets	29%	31%	36%	3%	2%
Overall economic conditions/general sales declines	21%	39%	40%	0%	0%
Federal regulation	20%	34%	28%	13%	5%
Liability	15%	21%	39%	21%	5%
Industry conditions	11%	37%	40%	10%	2%
Competition	11%	36%	29%	23%	2%
Cost of raw materials	10%	33%	33%	21%	3%
Federal taxes	8%	37%	29%	18%	8%
State/local taxes	8%	31%	29%	27%	5%
Energy costs	3%	27%	44%	16%	10%
Housing market	2%	17%	38%	29%	12%
Availability of credit	2%	10%	31%	34%	23%

	2013 (n=62)	2012 (n=117)
Health care costs	3.9	4.0
Insurance costs	3.8	3.8
Funding/budgets	3.8	3.9
Overall economic conditions/general sales declines	3.8	4.1
Industry conditions	3.6	3.5
Federal regulation	3.5	3.6
Industry conditions	3.5	3.7
Cost of raw materials	3.3	3.2
Competition	3.3	3.2
Federal taxes	3.2	3.6
Liability	3.2	3.1
State/local taxes	3.1	3.3
Energy costs	3.0	3.2
Housing market	2.8	2.6
Availability of credit	2.4	2.5

Imagine THE FUTURE

What strategies are you employing to get through tough economic times?

	2013 (n=63)	2012 (n=120)	2011 (n=92)
Becoming more diversified by entering new markets	62%	67%	66%
Focusing more on exports	40%	44%	46%
Focusing on higher margins	40%	43%	42%
Becoming more specialized by focusing on niche markets	38%	41%	41%
Becoming more diversified by entering new markets by focusing on several markets	30%	41%	40%
Developing partnerships/outsourcing	22%	23%	24%
Becoming a low cost provider	19%	22%	18%
Other	10%	9%	13%
Utilizing green technologies	3%	4%	8%

…and which have been the most successful?

	2013 (n=63)	2012 (n=120)
Becoming more diversified by entering new markets	21%	33%
Becoming more specialized by focusing on niche markets	19%	14%
Focusing on higher margins	15%	8%
Becoming more diversified by entering new markets or focusing on several markets	13%	13%
Developing partnerships/outsourcing	11%	7%
Focusing more on exports	8%	16%
Becoming a low cost provider	7%	7%
Other	5%	3%
Utilizing green technologies	2%	0%

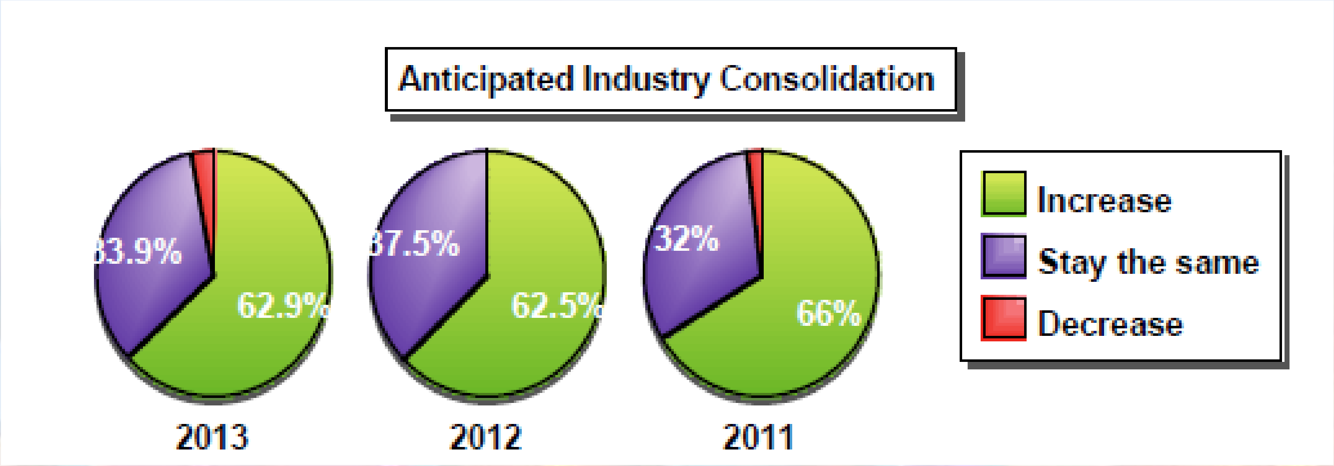
Imagine THE FUTURE

Which strategies have proven to be the most effective for marketing your products?

Mean Avg. 1=not at all effective, 5=extremely effective	2013 (n=58)	2012 (n=119)	2011 (n=92)
Website	4.1	4.1	3.8
Trade Shows	3.9	3.8	Not asked
Facebook	3.4	3.4	2.2
Magazine ads	3.4	3.3	Not asked
Twitter	2.4	2.6	2.3

Imagine THE FUTURE

What is your opinion on industry consolidation?



In Conclusion:

- The complete versions of these surveys will be provided on the website.
- Comments are appreciated, even after the fact. These surveys are improving and evolving.
- Please share the results with your business teams.
- Thank you for your time.

Scholarship:

- Thank you to Akron Brass for, once again, sponsoring the 2014 Phillip L. Turner Fire Protection Scholarship in the amount of $5,000.00.
- Current Schools "officially" involved are:
  - University of Maryland
  - Eastern Kentucky University
  - Oklahoma State University
  - Any others?
- Do we need to raise awareness of Scholarship program?
- Suggest consider supporting recipient travel expense to FRI in future to receive award?

Governmental Affairs Committee (GAC)

GOVERNMENTAL AFFAIRS COMMITTEE (GAC) MEMBERS

- Lee Morris & John Granby, Co-Chairs
- John W. McNulty,lll
- Mike Natchipolsky
- Craig Sharman
- Ken Creese
- Stewart McMillan
- Tim Dean
- Corey Carlson
- Cindy Morgan
- David Russell
- Rod Carringer

GOVERNMENTAL AFFAIRS

GAC Support

- Gabe Steinbach - Communications
- Richard Boyes - CGC Liaison
- Scott Edens - FAMA Board Liaison
- Karen Burnham - FAMA / FEMSA
- Dave Gatton - Washington Consultant

GOVERNMENTAL AFFAIRS

2014 Activity

- Hill Day – April 30/May 1 to coincide with CFSI (Last year: 75 meetings, 33 attendees representing 28 companies)
- Home Days – Please utilize Home Day primer located on GAC website
- Alliance Lunch – October – date TBD
- Ongoing meetings with members, staff and committee members
- GAC alerts and newsletter to all members

Imagine THE FUTURE

GOVERNMENTAL AFFAIRS

2014 Legislative Agenda

- Continue to push for continued funding for AFG
  - 2014 AFG appropriated funding $340 million
  - 2015 President's budget requests $335 million for AFG
- State/Federal fire truck weight laws (FAMA)
  - Possible Transportation Bill in the works
  - Will again partner with IAFC

GOVERNMENTAL AFFAIRS

2014 Goals

- Continue to promote our core initiatives
  - Full Funding for the Fire Act
  - Full funding for the U.S. Fire Administration
- Greater member participation
  - Hill Day/CFSI
  - Home Days
- More targeted communications and timely information

GOVERNMENTAL AFFAIRS

GAC tasks to Members

- This is a Relationship Business!!
- Call your Congressional Offices
  - Fire Act Funding Update
  - Election Outlook
- Call Before and After Election Day
- Report Back to GAC

Membership Committee

MEMBERSHIP

Committee Members

- Co-Chair - Gregg Geske, Waterous
- Co-Chair - Tim VanFleet, Akron Brass Co.
- Larry Dodson, Allison Transmission
- Rick Suche, Ft. Garry Fire Trucks
- Jerry Merges, VisionMark Nameplate Co.
- Mike Bowman, Spartan Chassis
- Board Liaison - Steve Toren, Waterous

Imagine THE FUTURE

MEMBERSHIP

Welcome New Members 2014

- Austin Hardware and Supply (7/13)
- Firetrucks Unlimited (10/13)
- Custom Truck and Body Works (10/13)
- Protect-O-Burn North America (1/14)
- Braun Industries (1/14)
- COXREELS (2/14)
- Emergency Vehicles Inc. (2/14)
- Harrington (3/14)
- Midwest Fire (3/14)

Imagine THE FUTURE

MEMBERSHIP

Top Prospective Members

- CSI Emergency Apparatus **
- Innovative Controls
- HUB Fire Engines & Equipment
- Precision Fire Apparatus **

*<u>** Contacted w/high probability of joining</u>*

MEMBERSHIP

Committee Objective 2014

- Grow Membership 5%
- *<u>Develop Membership Retention Plan</u>*
- Engage Member Company Participation

MEMBERSHIP

Ongoing Action Items

- Mentor Program (new members) – Identify Contact from Committee or Members to take Lead
- Engage Committee – Copy of the TOP Prospective Members (Distribute List) – Take "5" To Talk FAMA
- *Retention Pan – Board Input : Participation. Survey the Member Companies??*

Marketing/Internet Committee

MARKETING/INTERNET

Committee Members

- Andrew Lingel (Chair)
- Neil Chaney (co-Chair)
- Callan Jarabek (co-Chair)
- Randy Fuss
- Curt Ignacio (Board Liaison)

MARKETING/INTERNET

Activities and Priorities

- Promote FAMA member use of FAMA logo on member homepages
- Update/New FAMA brochure and literature
- FAMA/FDIC Marketing package
- FAMA Press Releases
- FAMA website
- Marketing committee needs

Imagine THE FUTURE

MARKETING/INTERNET

Promote use of FAMA logo on homepages

- Last year only 19 of the 125 members had a FAMA link on their homepages (15.2%)
- Now improved to 28 out of 125 (22.4%)
- Thanks to: Sam Carbis Solutions Group, Bulldog Fire, Duo-Safety, FRC, KME, Maintainer Custom Bodies, Marion Body Works, Pro Poly, & UPF

MARKETING/INTERNET

Update/New FAMA Brochure

- Top 10 Reasons to Join FAMA

For more information, visit www.FAMA.org.

For more information, visit www.FAMA.org.

HISTORY

At the end of World War II, the war-time ban on manufacturing non-military vehicles had left the fire service with a well-worn, inadequate fleet. Industry standards and apparatus designs reflected pre-war thinking and technology. Standing on the threshold of a new era in design, production and equipment technology, fire industry manufacturers realized that individual company resources were often not sufficient to improve the standards, as well as solve industry-wide concerns.

The manufacturers were anxious to produce new equipment utilizing this post-war technology while working collectively to improve safety standards within the fire service. It was their desire to pool these ideas, experiences and efforts that led to the creation of the Fire Truck Manufacturers' Association, the predecessor of today's Fire Apparatus Manufacturers' Association.

FUNCTION

The overall goal of FAMA is to advance and protect the interests of the fire and emergency services industry through the use of effective, open communication. To accomplish this, FAMA members work closely with national and international organizations within the fire service and fire industry. Members assist in the development of safety and performance standards, programs and objectives for improving fire apparatus and equipment as well as fostering the highest possible industry standards.

FAMA also supports realistic and attainable standards in industry-related legislation and regulations. By networking within and outside the industry, FAMA has established an excellent working relationship with many government agencies. Members speak at seminars across the nation and have provided information at congressional and government hearings to support improved regulations relating to the fire service and the safety of firefighters.

While FAMA does not directly determine any standards, members serve on many committees of the National Fire Protection Association (NFPA) and actively participate in the development of NFPA standards that apply to fire apparatus and equipment. By working with the NFPA, FAMA members assist in the research and development of performance-based minimum standards related to the manufacturing of fire apparatus and equipment. Throughout its history, FAMA has supported the research required for the development of safer products.

COMMITTEE STRUCTURE

The strength of the association is best exemplified through the structure of working committees. At least one representative of each FAMA member company is a member of the Technical Committee. Formed in 1952, the Technical Committee meets twice a year. Members are assigned to subcommittees that work with numerous industry experts in recommending safe, practical solutions that assist the NFPA in the formation of minimum performance standards. The work of the subcommittees is ongoing throughout the year, and they are well prepared to report their activities and findings to the full Technical Committee when it meets.

FAMA's standing committees, in addition to the Technical Committee, include Bylaws, Educational, Governmental Affairs, Internet, Long Range Planning, Meeting Planning, Membership, Nominating, Public Relations, Statistics and Trade Shows. Each committee's mission, goals, objectives and makeup are found on the association's web site at www.fama.org.

INDUSTRY RELATIONS

As well as serving North American fire service communities through its involvement with NFPA, FAMA members also integrate with and support the International Association of Fire Chiefs (IAFC), the Fire Department Safety Officers Association (FDSOA), the Fire and Emergency Manufacturers and Services Association (FEMSA) and other fire service related organizations.

WHITE PAPER REPORT

Through the input of its member companies, FAMA releases its White Paper report for the benefit of all North American fire service agencies that provide public fire protection to the citizens of their communities. The report is organized into five sections which summarize specific improvements and added features developed during the past 20 years related to chassis, cab and body, pump and accessories, foam systems and aerial devices.

The report is intended to serve as a resource for fire service administrators who are considering replacement of outdated or obsolete fire protection equipment, or who are in the process of purchasing new equipment. Updated reports are scheduled following the release of future editions of NFPA 1901, Standard for Automotive Fire Apparatus.

FAMA MEMBERS

From a handful of manufacturers who established the organization back in 1946, FAMA has grown to nearly 100 member companies throughout North America. Members meet as a group twice a year to promote the advancement of technology and safety in firefighting equipment; however, their activities through various committees is ongoing throughout the year. The Board of Directors meets monthly to address the needs of committees and the membership, while maintaining continuity of all other association-related matters. FAMA is unique in that members openly share information and freely discuss common issues to determine what can be accomplished that will best meet the needs of the fire service as a whole. This type of communication has allowed manufacturers and end users to enjoy the benefits of highly improved, more efficient and safer equipment.

FAMA membership is open to qualified individuals, partnerships and corporations engaged in the manufacturing of firefighting or fire protection apparatus (including rescue vehicles that complement fire apparatus), or are engaged in the manufacturing of components or products which are incorporated by the apparatus manufacturer as a permanent part of the completed fire apparatus, such as chassis, fire pumps, fire hoses, hose reels, ladders, aerial devices, apparatus valves and other water control appliances. One stipulation is that the prospective member must be engaged in manufacturing in North America.

SCHOLARSHIPS & INTERNSHIPS

FAMA sponsors a variety of scholarship and internship programs throughout the year. Currently, the association cooperates with Eastern Kentucky University, Oklahoma State University and the University of Maryland in providing one scholarship each year to one of the universities. The award rotates each year to the next university. The applicable university submits the name or names of worthy students for consideration. The FAMA Scholarship Program was initiated in 1986 and over the years has contributed significantly to assist deserving students in degreed fire protection engineering programs across the county.

The association's Intern Program is multi-functional. FAMA supports the Congressional Fire Services Institute (CFSI) in Washington, DC and its intern program by providing the means for the CFSI to employ student interns throughout the year. In addition, FAMA's own Intern Program offers students seeking employment with fire apparatus and equipment manufacturers an opportunity to work within FAMA member companies.

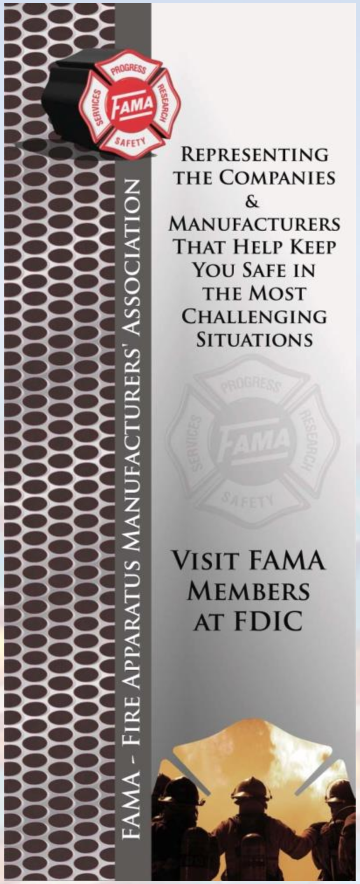
THE MISSION OF FAMA

The Fire Apparatus Manufacturers' Association is a non-profit trade association established in 1946. Members of FAMA are committed to enhancing the quality of the fire apparatus industry and emergency service community through the manufacture and sale of safe, efficient fire apparatus and equipment.

MARKETING/INTERNET

FAMA/FDIC Marketing Prep.

- New FDIC banner completed and and ad submitted



MARKETING/INTERNET

FAMA Press Releases

- Current PR list
  - Meeting, Membership and Education
- Customized headers

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MARKETING/INTERNET

FAMA Website

- Evaluations of website ongoing with improvement opportunities identified
- We will be meeting with Windmill Hill at FDIC to discuss the implementation of website changes

MARKETING/INTERNET

Marketing/Internet committee needs

- Looking for 1 or 2 people to help the Marketing committee

FIRE APPARATUS MANUFACTURERS' ASSOCIATION

SPRING MEETING

PROGRESS SERVICES FAMA RESEARCH SAFETY

WATEROUS

Monday Coffee Break Sponsor

Thank you for supporting FAMA!

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FIRE APPARATUS MANUFACTURERS' ASSOCIATION

SPRING MEETING

PROGRESS SERVICES FAMA RESEARCH SAFETY

PPG Commercial Coatings

Bringing innovation to the surface.™

Business Speaker Sponsor

Thank you for supporting FAMA!

Imagine THE FUTURE

Mike Rezmer

Disney Institute of Imagineering

Imagine THE FUTURE

Luncheon – Horizon Salons 1 - 3

FIRE APPARATUS MANUFACTURERS' ASSOCIATION

SPRING MEETING

PROGRESS
SERVICES
FAMA
RESEARCH
SAFETY

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Monday Luncheon Sponsor

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Disney Backstage Tour – 1:15 PM

Gov't photo ID & footwear

FIRE APPARATUS MANUFACTURERS' ASSOCIATION

PROGRESS

SERVICES

FAMA

RESEARCH

SAFETY

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