Good Morning !!

Welcome

to Day 2 of the Spring 2012 FAMA Membership Meeting

Call to Order

Housekeeping

TCa

Congratulations to our Award Winners

Good Egg – Dave Durstine
Tube Steak – Jeff Hupke
Best Dressed – Bill Ballantyne
Low Net Score – Lou Milanovich

Goodwill Ambassador – Donna Halpin

Star Achiever – Jeff Resch

TCa

Technical Committee and NFPA 1901 Report

Technical Committee

Co-Chairs

David Durstine
Mike Moore

Subcommittee (Co-Chairs)

Aerial/Quint

Jim Salmi
Jeff Aiken

ARFF

Grady North
Marty Huffman

Ambulance

Steve Cole
Steve Rowland

Body

Bill Proft
Mike Lemieux

Chassis

Roger Lackore
Tim Johnson

Electrical

John Doperalski
Peter Luhrs

Foam

Dominic Colletti
Gregg Geske

Pumps & Plumbing

Doug Miller
Chad Trinkner

Tech Education

Maria Hovanes
Dan Veselsky

Technical Committee

TC2

2012 Initiatives

- Published a quarterly Technical Committee E-Newsletter.
- Promote Communications and Committee Work outside the 2 Technical Meetings (Spring & Fall)

TC3

Technical Committee

2012 Spring Tech Meeting

Will be held Thursday April 19th, 2012

(FDIC, Indianapolis Convention Center Indianapolis, IN)

Special to Thanks to our Spring Meeting Sponsors

MERITOR™
A Heritage of Rockwell Technology

FRC

TC4

Technical Committee

2012 Fall Tech Meeting

Will be held in Conjunction with FRI (Denver, CO)

Special to Thanks to our 2011 Fall Meeting Co-Sponsors

WATEROUS SINCE 1886

R·O·M CORPORATION

Excellence made to order.

TCb

NFPA 1901 Update

NFPA 1901

TC5

Representatives:

Principal	David Durstine
Alternate	Mike Schoenberger

NFPA 1901

TC6

Responsible Documents & Revision Cycles

- NFPA 1901 Standard for Automotive Fire Apparatus
  Fall ~~2013~~ **2015** Revised Edition Date: ~~2014~~ **2016**

- NFPA1906 Standard for Wildland Fire Apparatus
  Fall ~~2016~~ **2015** Revised Edition Date: ~~2017~~ **2016**

- NFPA 1911 2012 Edition Standard for the Inspection, Maintenance, Testing, and Retirement of In-Service Automotive Fire Apparatus
  Fall 2016 Edition Date: 2017

- NFPA 1912 Standard for Fire Apparatus Refurbishing
  Fall 2015 Edition Date: 2016

TC7

NFPA 1901 & 1906

Revised Cycles

- NFPA 1901 Extended by 2 year
  - Fall ~~2013~~ **2015** Revised Edition Date: ~~2014~~ **2016**
- NFPA1906 Shortened by 1 year
  - Fall ~~2016~~ **2015** Revised Edition Date: ~~2017~~ **2016**

Benefits

- Lead to greater consistency between the standards
- Improved processes with both documents in the same cycle
- Eliminate confusion as all apparatus standards changes will be effective at the same time

TCc

NFPA 1500 & 18 Committee Report

TC8

NFPA 18 – Wetting Agents and Water Additives

NFPA 1500 – Fire Service Occupational Health and Safety

FAMA representatives:

NFPA 18 – Dominic Colletti (P) and Jerry Halpin (A)

NFPA 1500 – Dominic Colletti (P) and Leroy Coffman (A)

TC9

NFPA 18 Committee

- Technical Committee is responsible for two separate documents:
  - NFPA 18 – *Standard on Wetting Agents*
  - NFPA 18A –*Standard on Water Additives For Fire Control and Vapor Mitigation*

- NFPA 18 and 18A are in a Fall of 2015 revision cycle
- Next committee meeting will be in Q4 of 2012
- Public Input closing date is January 2014

NFPA 1500 Committee

NFPA 1500, *Fire Department Occupational Health and Safety Program*

- This 1500 document has gone through cycle and will be published this summer/fall. Notable revision changes:

TC11

6.2.1.1 The AHJ shall be responsible for driver training that complies with NFPA 1451, Standard for a Fire Service Vehicle Operations Training Program to members on the operation of specific fire department owned pumpers and mobile water supply apparatus that hold greater than 999 gallons of on board water supply.

6.2.1.2 The AHJ shall establish the maximum speed that the apparatus shall operate at and post that speed on a placard mounted on the dash within view of the driver, stating “Maximum apparatus speed warning: do not exceed XX MPH.”

TC12

6.2.2.2 Pumpers and Mobile Water Supply Apparatus that do not have Anti-Lock Brake Systems (ABS) and carry over 999 gallons of on-board water supply shall be operated in non-emergency mode at all times.

NFPA 1500 Committee

NFPA 1500, *Fire Department Occupational Health and Safety Program*

Technical committee met during the week of March 12th in San Diego to review public input on two documents just entering revision cycle:

- NFPA 1561, *Standard on Emergency Services Incident Management System*
- NFPA 1521, *Standard on Fire Department Safety Officer*

2012 Objectives

Year 2012 FAMA Committee NFPA 1500 and 18 Objectives:

- Remain active with both NFPA technical committees and identify any areas of the proposed 1500 and 18 series of standards that could affect FAMA member companies.

- Regarding the 1500 document, stay active with the NFPA technical committee and continually educate members on the safety impacts regarding changes in fire apparatus.

TSa

Tradeshows Advisory Committee

TS1

Tradeshows Advisory Committee

- Additional questions were added to the FEMSA tradeshow survey to better judge FAMA issues like staging areas and truck move-in processes.
- The 2018-2022 FRI site selection committee has narrowed the field down to 12 sites. IAFC staff will visit the new sites, then hold a conference call with the entire committee in an attempt to narrow the list more. The entire committee will then visit all sites for final recommendations to the IAFC board for their final decision at their November meeting.

ECa

Education and Scholarships Committee

EC1

Education Committee

Co-Chairs: Jeff Hupke & Tammy Laridaen
Members: Curt Ignacio, Russell Chick, Rebecca Schenk
Board Liaison: Bruce Whitehouse

EC2

Thank you
Once Again
Akron Brass!

EC3

2012 Phillip L Turner Fire Protection Scholarship for outstanding Achievement

- University Notification- March 19-23
- College Visits – working them in April-June
- Evaluation of Applications- June 1-30
- Board Review- June 29th
- Award Presentation IAFC – Denver Colorado

WE NEED YOU!!!

Additional Committee Members Needed!!!

- Research Colleges that are offering four-year fire protection engineering programs

MKTa

Marketing / Internet Committee

MKT1

Marketing Committee

- Ron Truhler, Chair
- Dave Durstine
- Eric Combs
- Maria Hovanes
- John Weber

MKT2

Marketing Committee Project Guidelines

- Who is my audience?
- What is my basic message?
- What is the action item I'd like them to do after viewing/reading this?
- What additional details are required to be included in the message?
- Who can answer questions for Marketing and who can answer them for the Reader once the item is released?
- In what format do I need (PowerPoint, PDF, printed literature, etc.) the item?

If we can get these questions answered by the committee chair, we can help more efficiently without confusion and multiple emails.

FAMA Spring Meeting 2012

MKT3

AD: In FDIC show guide

Video: FAMA video playing on buses

Banners: (5) 4x10 Double-sided hanging in Maryland St. hallway

Attendee Bag : With FAMA Logo and Booth Number

MPa

Meeting Planning Committee

Committee Members

- John Swanson – Chairman
- Mark Albright – Vice Chair
- Harold Boer – Board VP
- Ed Dobbs
- Geary Roberts
- Damon Lewis
- Bob Grimaldi – Travel Agent/Consultant

Corporate Sponsors

- Fire Engineering Magazine – Corporate Sponsor
- AMDOR & Spartan Motors, Inc. (Joint) – Reception
- PPG Industries – Business Speaker
- MaxxForce Engines – Monday Dinner Open Bar
- Waterous – Coffee Break
- United Plastics – Cups for hospitality suite

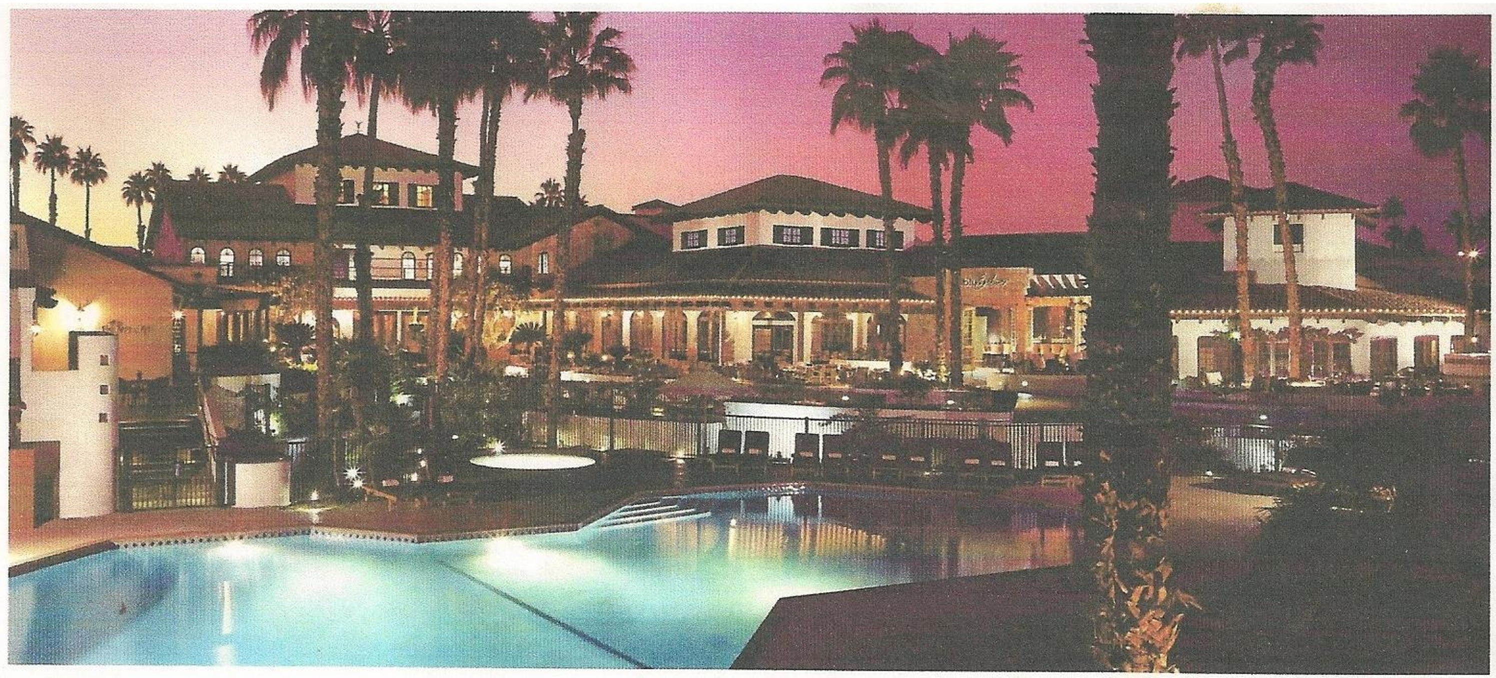
Fall 2012
FAMA/FEMSA Joint Meeting

- Location: Glendale, AZ
- Date: Sept. 26-29, 2012
- Hotel: Glendale Marriott
- Base Rate $199.00 per night

Spring 2013
FAMA Meeting

- Location: Rancho Mirage, CA
- Date: March 15 - 19, 2013
- Hotel: Rancho Las Palmas
- Base Rate $249.00 per night

Spring 2013 FAMA Meeting



RANCHO LAS PALMAS RESORT & SPA

Rancho Mirage, California, USA

Spring 2013 FAMA Meeting

Fall 2013
FAMA/FEMSA Joint Meeting

- Location: Tampa, FL
- Date: Sept. 25 - 27, 2013
- Hotel: Renaissance Tampa
- Base Rate $159.00 per night

Spring 2014
FAMA Meeting

- Location: Orlando, FL
- Date: March 14 - 18, 2014
- Hotel: Wyndham - Lake Buena Vista Resort
- Base Rate $125.00 per night

Fall 2014
FAMA/FEMSA Joint Meeting

- Location: San Antonio, TX
- Date: October 8 – 11, 2014
- Hotel: Plaza Marriott
- Base Rate $199.00 per night

Future Dates

- Spring 2015 – March 21 – 24
- Fall 2015 – October 7 – 9
- Spring 2016 – April 2 – 5
- Fall 2016 – October 5 – 7
- Spring 2017 – March 17 – 22
- Fall 2017 – October 4 – 6

Responsibilities

- Budget and plan for the General Membership Meetings
- Select topics of interest and speakers for General Membership Meetings
- Work with Marketing Committee to publicize and promote Spring and Fall meetings
- Coordinate awards and acknowledgements at General Membership Meetings
- Develop a schedule and budget for group and optional social activities in conjunction with the General Membership Meetings
- Prepare survey for meeting evaluation
- Hotel inspection/Site survey

Meeting Site Criteria

- Rate within the FAMA/FEMSA budget
- Prefer to be largest group at hotel during stay (more attention from hotel staff)
- Minimum 100 room property (FAMA requires average 85 rooms)
- Four star property
- Business hotel rather than leisure hotel property
- Major hotel chain (National representatives are available)
- Located within 1 hour drive from nearest airport
- Direct flights from major cities such as NY, Chicago, Atlanta
- Hotel features including internet access, restaurant and meeting rooms
- Hospitality suite on ground floor with pool access

Mission Statement

The mission of the Meeting Planning Committee shall be to strengthen the FAMA organization, enhance FAMA's service to its membership and the industry and further the goals and objectives of FAMA through coordinating the planning and implementation of the Spring and Fall Annual Meetings.

NCa

Nominating Committee

Nominating Committee

Two Positions open for nominations:

- Junior Director at Large – 2 Year Term
- Secretary – progressive position on the Board Executive

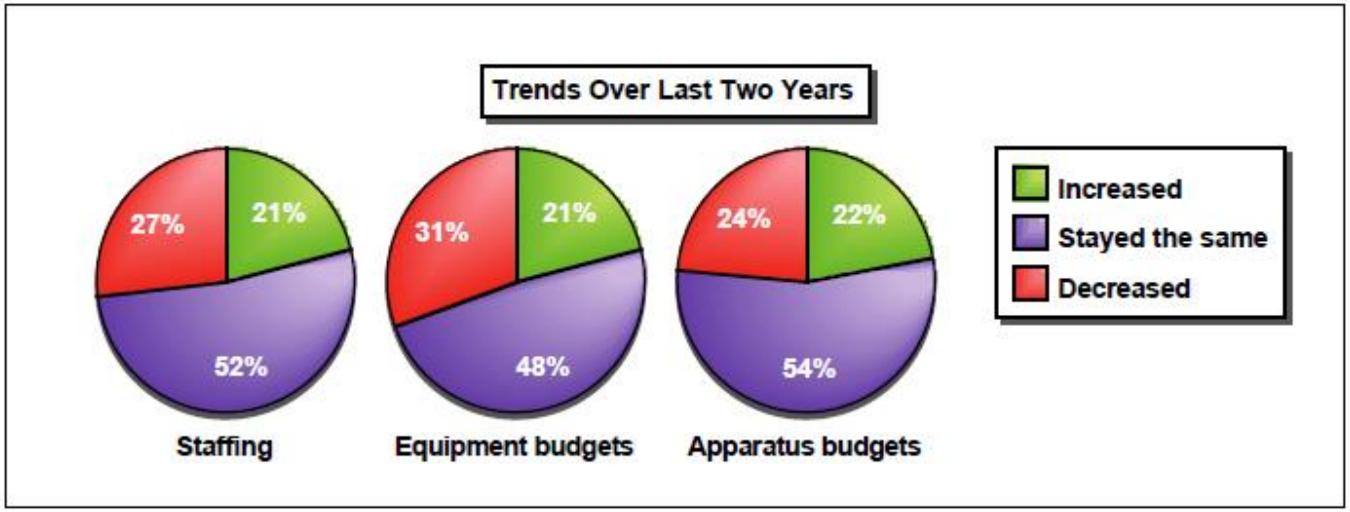
Education Committee: Survey Analysis

Education Committee: Survey Analysis

2011
FAMA/FEMSA Industry Survey of Fire Chiefs
[Jeff Hupke, Education Committee Co-Chair]

Trends

Staffing levels, equipment budgets and apparatus budgets still decreased overall for 2011. However, when compared to previous years, the budgets did not decrease as much.

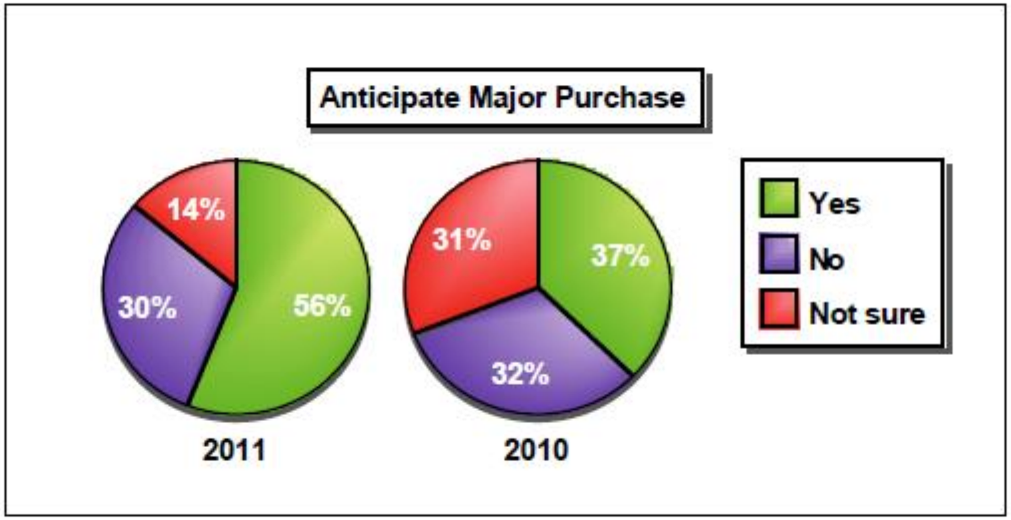


Apparatus Purchase

Fifty-six percent of respondents anticipate making a purchase during the next fiscal year. This is up from the previous year. Of those who anticipate making a purchase 81% will purchase an apparatus and 77% equipment.

Quality and safety are the two most important factors in an apparatus/equipment purchase.

Colleagues are the most important sources of information.



Over half of the departments anticipate purchasing a pumper during the next two years and 20% anticipate purchasing an ambulance transport.

Pumper	56%
Ambulance transport	20%
Rescue	14%
Wildland	13%
Utility truck	13%
Tanker	10%
Heavy rescue	7%

FAMA Spring Meeting 2012

3. Respondent Characteristics

a. Organization Type *(What is the organization type of your fire department?)*

Four out of ten fire departments (44%) responding to the survey are volunteer departments; 27% are career departments. Twenty-seven percent of fire departments are a combination of career and volunteer. (Note: n=225.)

	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Volunteer	44%	37%	24%
Career	27%	21%	31%
Combination career/volunteer	25%	41%	42%
Private/contractual	1%	---	<1%
State/federal	<1%	---	<1%
Other	3%	---	2%

b. Population Served *(What size population does your department serve?)*

Almost half (46%) of the fire departments responding to the survey serve populations of 5,001–50,000. Fifteen percent serve populations of 50,001–100,000 and 8% serve populations of 100,001–500,000. Only 5% of the departments serve populations of more than 500,000. (Note: n=225.)

	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Less than 5,000	26%	25%	13%
5,001–50,000	46%	56%	58%
50,001–100,000	15%	14%	15%
100,001–500,000	8%	2%	12%
500,001–1,000,000	1%	4%	1%
More than 1,000,000	4%	0%	1%

c. Type of Structures Protected *(What types of structures/areas does your department protect?)*

Almost all of the departments protect single family (96%) and multi-family (87%) dwellings. The next most common type of structure protected is industrial parks– by 61% of the departments. (Note: n=225.)

As would be expected, the type of structures protected is correlated at a statistically significant level with the population served.

- Large communities are more likely than smaller communities to protect high-rises, skyscrapers, industrial parks, and hazardous structures.

	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Single-family dwellings	96%	99%	98%
Multi-family dwellings	87%	84%	92%
Industrial Park	61%	64%	69%
Wildland	61%	74%	61%
Hazardous structures	45%	46%	54%
High-rise (6 to 38 floors)	38%	33%	40%
Skyscraper (39+ floors)	2%	1%	2%
Other	18%	---	---

1. Anticipated Actions Due to Economic Conditions

(Which of the following actions do you plan to take due to economic conditions?)

Just under one-half of the respondents indicate they will change their standard operating procedures as a result of the economic conditions and 35% will refurbish their existing apparatus. While data from the 2010 and 2009 surveys is presented, some questions were not asked in 2011 so comparisons are not made. (Note: n=225.)

	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Postpone planned purchases	Not asked	62%	66%
Reduce number of planned purchases	Not asked	54%	58%
Standard operating procedures will change	46%	21%	29%
Fees for service levied	18%	15%	26%
Cancel planned purchases	Not asked	31%	25%
Reduce staff	19%	26%	24%
Refurbish existing apparatus	35%	32%	21%
Forced to acquire non-NFPA compliant apparatus	7%	5%	3%
Other	31%	14%	10%

2. Anticipated Trends Over Next Two Years

(Over the next two years (2012 and 2013), how do you expect your (equipment budget, apparatus budget) to change?)

During the next two years, equipment and apparatus budgets are expected to increase. (Note: n=225.)

	Equipment Budget	Apparatus Budget
Increase	27%	27%
Stay the same	53%	51%
Decrease	20%	22%

3. FEMA or SAFER Grant Recipient

(Have you received a FEMA or SAFER grant during the last two years?)

Just under one-half of respondents (47%) have received a FEMA or SAFER grant. This is down from the 70% of respondents who received one in 2009. (Note: n-225.)

	2011 (n=225)	2009 (n=1,072)
Yes	47%	70%
No	45%	30%
Not sure	8%	0%

Being a grant recipient was cross-tabulated against organizational type and population size to determine if a statistically significant relationship exists.

Being a grant recipient is correlated to organizational type. Career departments and a combination of career/volunteer departments are more likely to have received a FEMA or SAFER grants.

4. Use of FEMA or SAFER Grant

(What was the FEMA/SAFER grant for?)

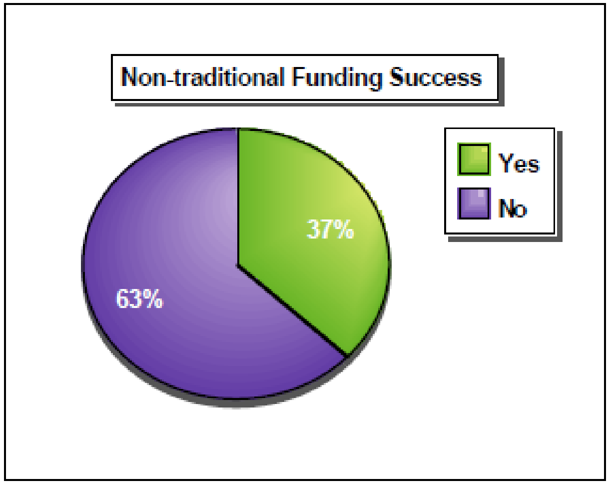
Of those receiving a FEMA or SAFER grant, 71% used the grant for equipment; 14% have used it for apparatus. Usage for equipment and apparatus is down from 2009 figures. (Note: n=225.)

	2011 (n=225)	2009 (n=1,072)
Equipment	71%	94%
Apparatus	14%	23%
Staffing	15%	16%

5. Success of Non-Traditional Funding Methods

(Has your department been successful with non-traditional funding methods?)

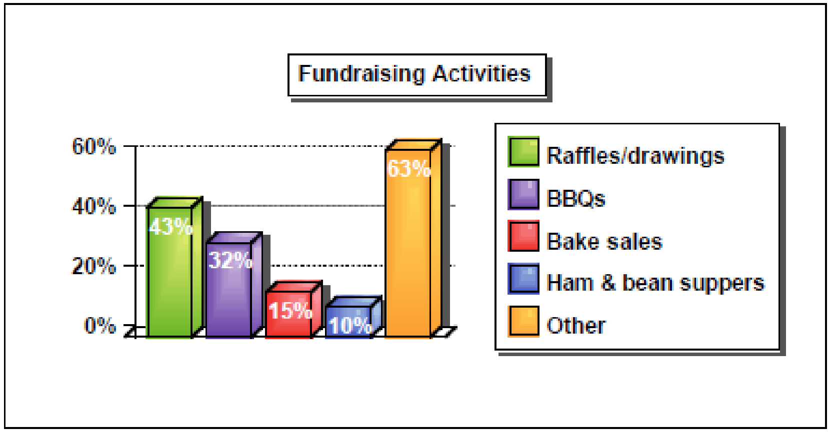
Just over one-third of departments have had some success with non-traditional funding sources. (Note: n=225.)



6. Fundraising Activities Used

(What were these fundraising activities?)

About half of those conducting non-traditional fundraising are holding raffles/drawings. Almost two-thirds are doing a variety of other fundraising activities including asking for donations, pancake breakfasts, and boot drives. See Appendix B for a complete list.



7. Most Important Emphasis for FAMA/FEMSA

(In which one of the following areas could FAMA and FEMSA best help fire chiefs find/access funding?)

Over half of the departments most want FAMA/FEMSA to help raise overall awareness of funding sources. (Note: n=225.)

Raising overall awareness of funding sources (federal, state, private, etc.)	54%
Define criteria for selecting the best source (matching needs with source)	24%
Training for accessing potential sources of funds.	21%

8. Current Budget Funding

(How is your equipment/apparatus budget funded? (Total should add up to 100%))

About two-thirds of equipment is funded by tax revenue and 54% of apparatus is funded by tax revenue.

(Note: Although respondents were requested to have percentages add up to 100%, in many cases they did not.)

	Equipment Budget	Apparatus Budget
Tax revenue	66%	54%
Fundraising	8%	6%
Municipal bonds	4%	9%
Grants	8%	8%
Other	3%	3%

9. Trends Over Last Two Years

(Over the last two years has your (staffing level, equipment budget, apparatus budget) increased, stayed the same or decreased?)

Staffing levels, equipment budgets and apparatus budgets still decreased overall for 2011. However, when compared to previous years budgets did not decrease as much.

Staffing Levels	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Increased	21%	19%	27%
Stayed the same	51%	54%	51%
Decreased	27%	27%	23%

Equipment Budgets	2011 (n=225)	2010 (n=81)	2009 (n=1,072)
Increased	21%	16%	19%
Stayed the same	48%	37%	44%
Decreased	31%	47%	37%

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

FAMA Spring Meeting 2012

1. Current Apparatus Owned

(Which of the following apparatus does your department currently own?)

Almost all fire departments currently own a pumper and just under two-thirds of departments own a rescue and wildland vehicle. (Note: n=225.)

Pumper	98%
Rescue	61%
Wildland	60%
Utility truck	58%
Aerial	56%
Tanker	53%
Ambulance transport	33%
Heavy rescue	31%
Command center	25%
ARFF (Airport Rescue Firefighting)	6%

2. Anticipate Major Purchase

(Do you anticipate making a purchase during the next fiscal year?)

Over half (56%) of fire departments anticipate making a major purchase during the next fiscal year; 30% indicated they would not be. Compared to last year's results, more fire departments anticipate making a purchase. (Note: n=225.)

	2011 (n=225)	2010 (n=81)
Yes	56%	37%
No	30%	32%
Not sure	14%	31%

3. Planned Purchases

(What do you anticipate purchasing?)

Of those anticipating a purchase, 81% anticipate purchasing an apparatus and 77% will purchase equipment. (Note: n=127.)

Apparatus	81%
Equipment	77%
Training	46%
Computer hardware/software	47%
Fire station furnishings	31%
Fire station	21%

4. Anticipate Purchasing Next Two Years

(Which of the following apparatus does your department anticipate purchasing in the next two years?)

Over half of the departments anticipate purchasing a pumper during the next two years and 20% anticipate purchasing an ambulance transport. (Note: n=225.)

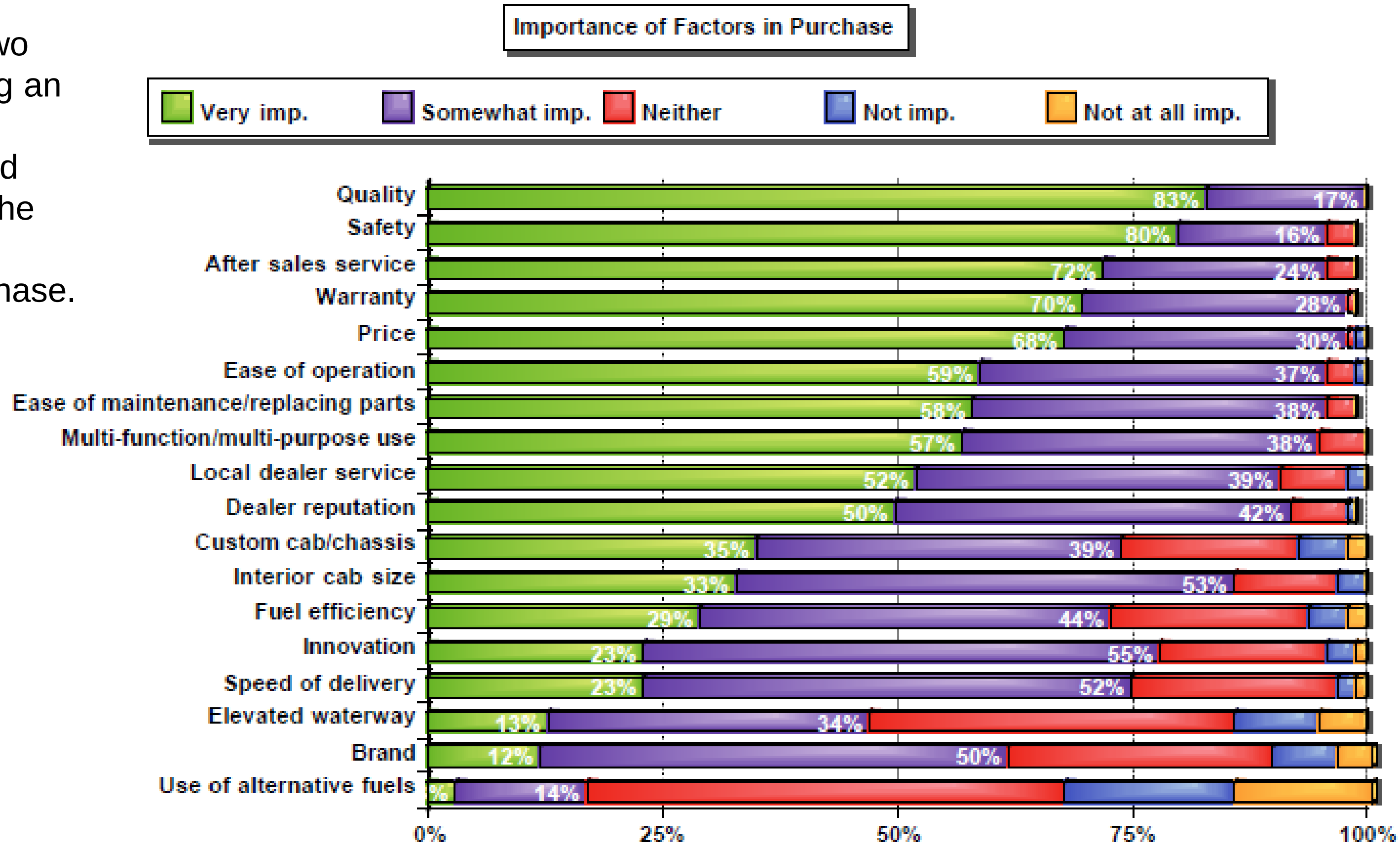
Pumper	56%
Ambulance transport	20%
Rescue	14%
Wildland	13%
Utility truck	13%
Tanker	10%
Heavy rescue	7%
Command center	4%
ARFF (Airport Rescue Firefighting)	3%
Aerial	0%
Other	28%

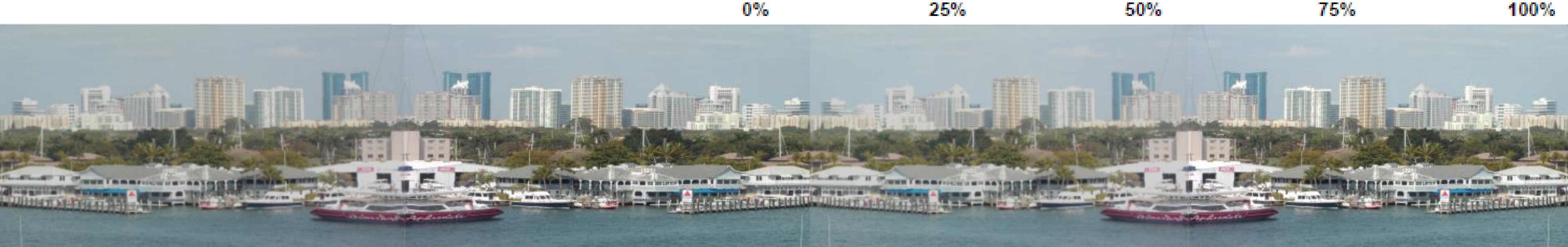
FAMA Spring Meeting 2012

5. Importance of Various Factors in Apparatus/Equipment Purchases

(Please rate the importance of the factors below in purchasing apparatus and equipment.)

Quality and safety are the two important factors in choosing an apparatus and equipment. Elevated walkway, brand and use of alternative fuels are the least important factors in an apparatus / equipment purchase. ((Note: n=225)

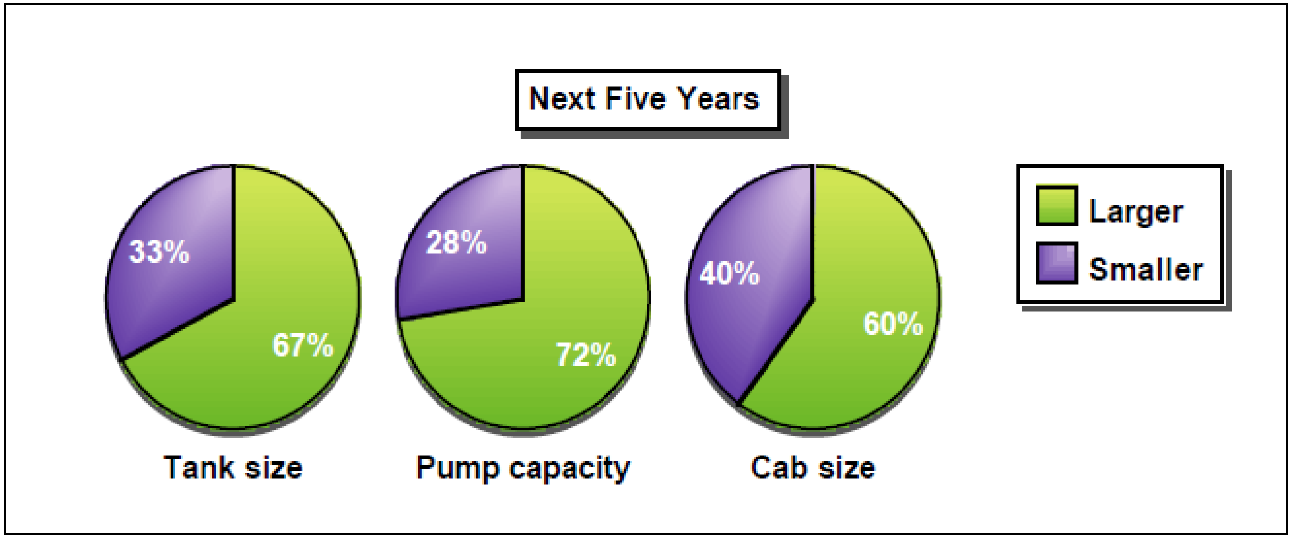




6. Future Trends

(For each of the following, please circle which way you believe each will change over the next 5 years.)

Over the next five years, the majority of fire departments anticipate that tank size, pump capacity and cab size will be larger. (Note: n=225.)



Most do not believe there will be patient transport capability, however; most believe there will be more compartments and the chassis will be custom.

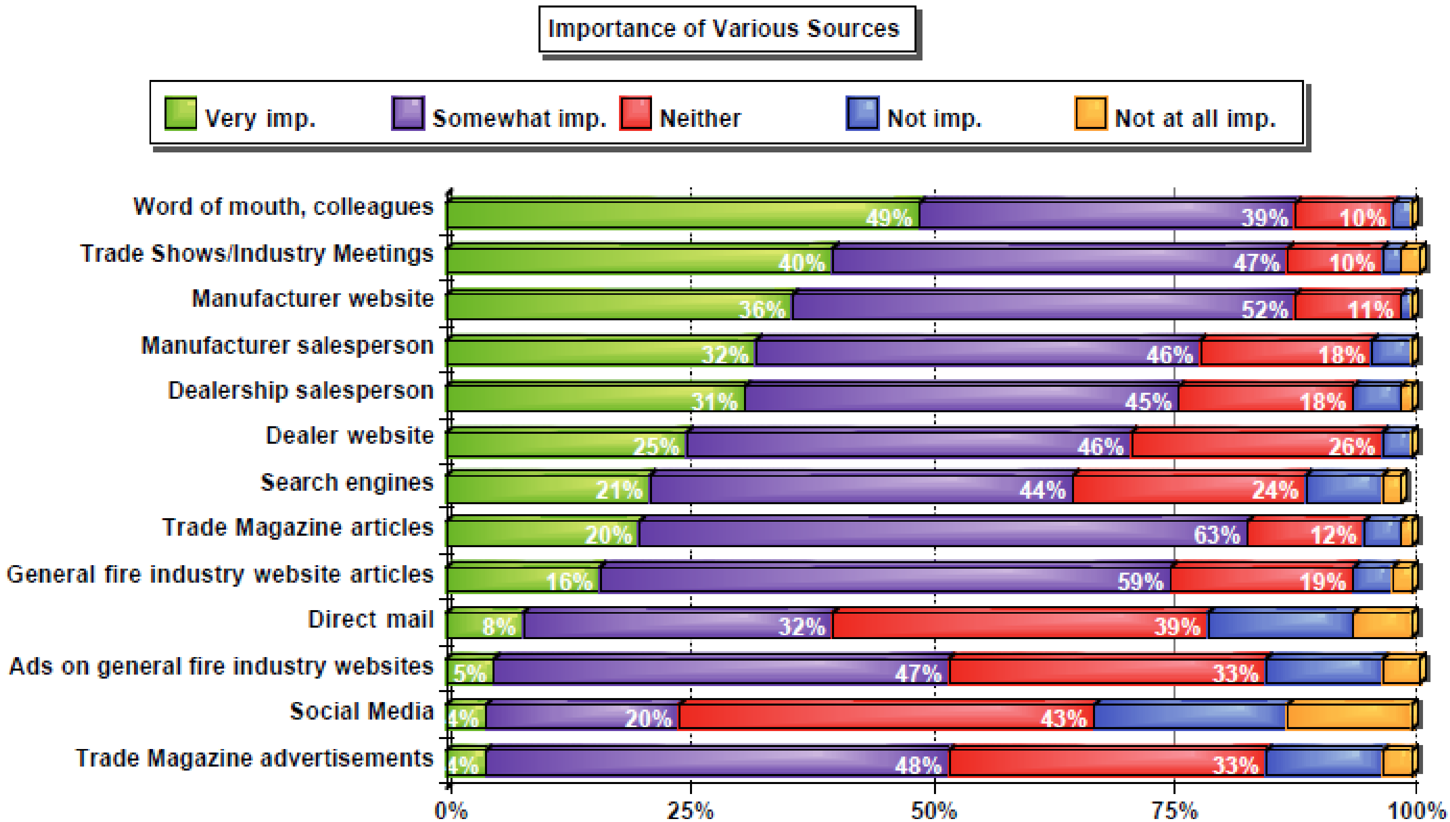
Patient transport capability	24%–yes	76%–no
Compartments	88%–more	12%–less
Chassis	63%–custom	37%–commercial

FAMA Spring Meeting 2012

7. Importance of Various Sources

(Please rate the importance of each of the following when seeking information on apparatus and equipment.)

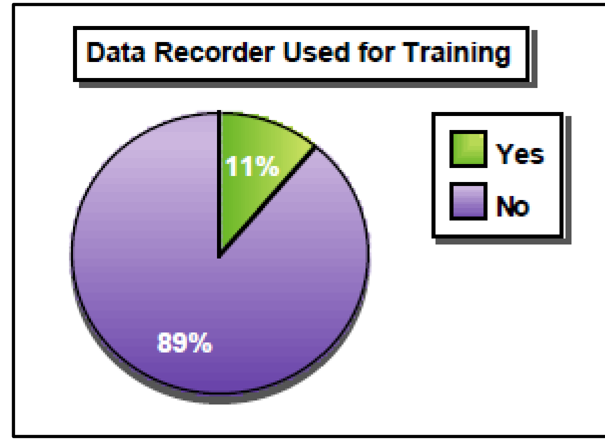
Word-of-mouth / colleagues are the most important sources of information with 49% indicating it is very important and 39% stating it is somewhat important. Tradeshows and manufacturer's website are also important sources of information. Social media and trade magazine advertisements are least important sources of information.
(Note: n=225.)



1. Usage of Data Recorder for Training

(Has your department used data recorder for training?)

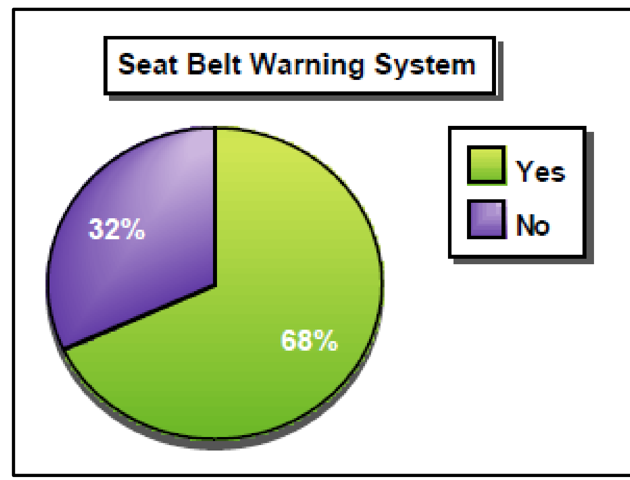
Eleven percent of departments have used a data recorder for training. (Note: n=225.)



2. Seat Belt Warning System Increased Seat Belt Usage

(Has the new seat belt warning system increased seat belt use?)

Two-thirds of departments believe the new seat belt warning system has increased seat belt usage. (Note: n=225.)



Education Committee: Survey Analysis

2011

FAMA/FEMSA Member Outlook Report

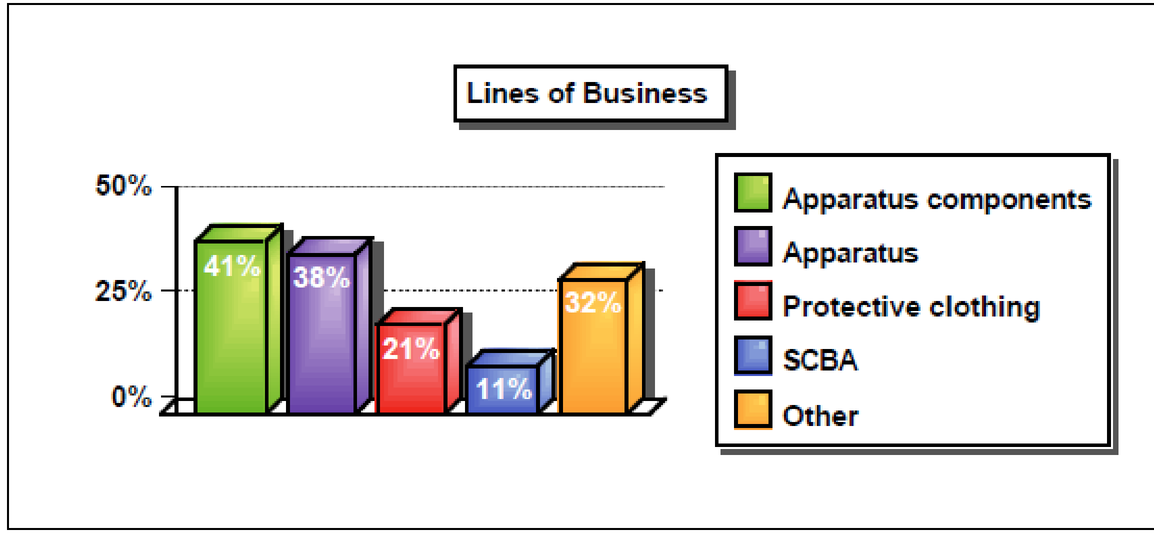
[Jeff Hupke, Education Committee Co-Chair]

FAMA Spring Meeting 2012

1. Lines of Business

(What line(s) of business are you in?)

Forty-one percent of respondents sell apparatus components and 38% sell/manufacture apparatus. Thirty-two percent of respondents indicated “other” as their type of business including:



2. Geographic Areas Served

(Please estimate the percentage of your primary business sales in each of the following areas so that the total is 100%.)

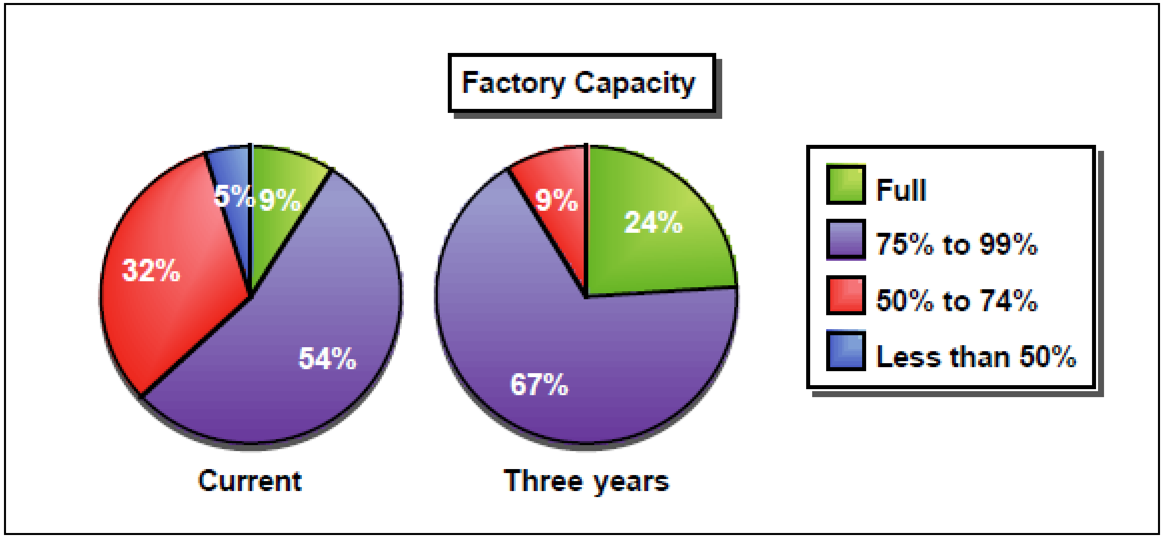
Members serve the various areas of the country fairly evenly. (Note: n=92.)

Northeast US	19%
Southeast US	16%
Midwest US	18%
Western US	12%
Canada	10%
Other	5%

1. Current and Projected Factory Capacity

(What is your current factory capacity/what will it be in three years?)

Nine percent of respondents' factories are currently full and 54% are running at 75% to 99% of capacity. Within three years, 24% are anticipated to be at full capacity and two-thirds will be at 75% to 99% of capacity. (Note: n=75.)

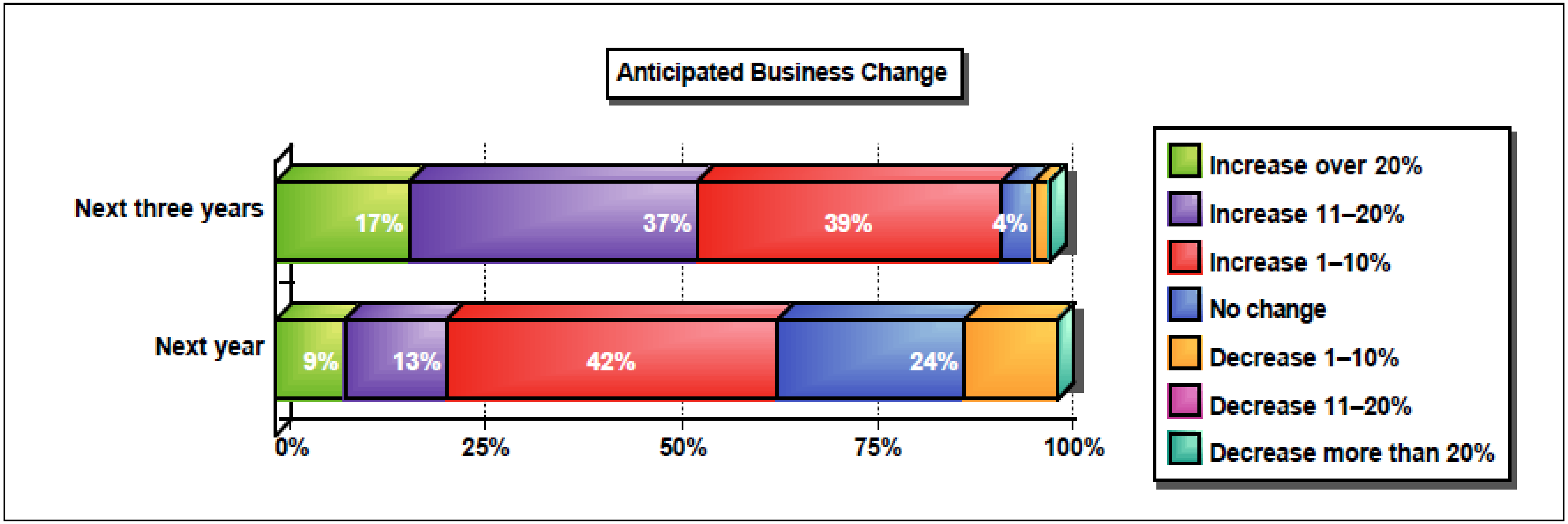


FAMA Spring Meeting 2012

2. Anticipated Business Change

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

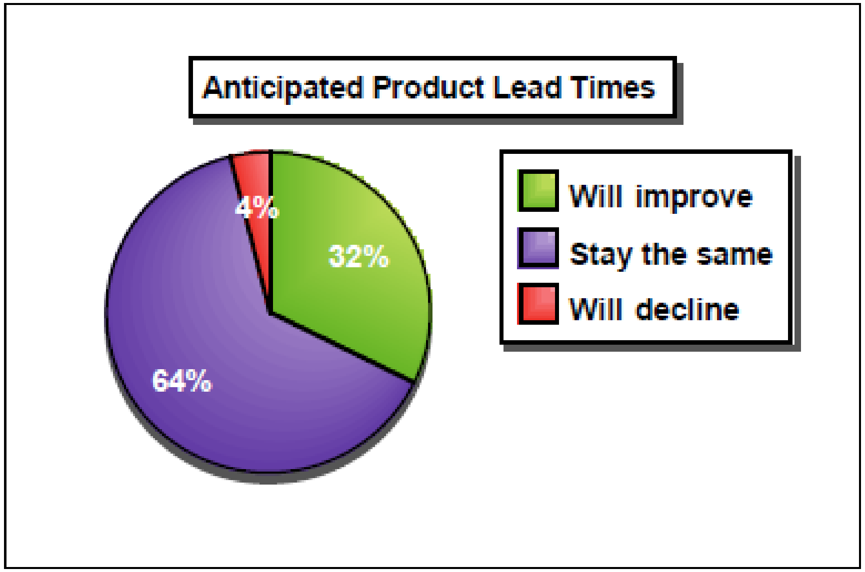
Just under one-third of respondents (64%) expect their business to increase next year and almost all (93%) expect their business to increase during the next three years. Seventeen percent of respondents anticipate their business growing over 20% during the next three years and 37% believe it will grow 11% to 20%. (Note: n=92.)



3. Anticipated Product Lead Times

(What do you expect in terms of product lead times over the next three years?)

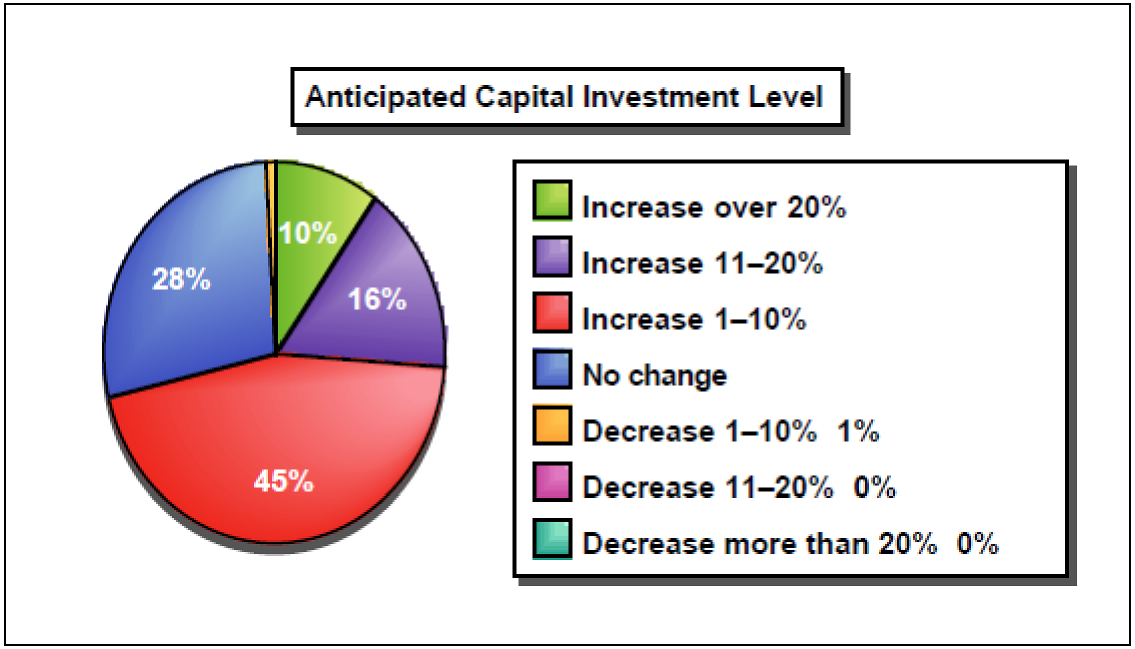
One-third of respondents anticipate product lead times will improve over the next three years and 64% believe they will stay the same. Four percent of respondents anticipate they will decline. (n=81.)



4. Expected Change to Capital Investment Over Next Three Years

(What change is expected in the level of capital investment over the next three years?)

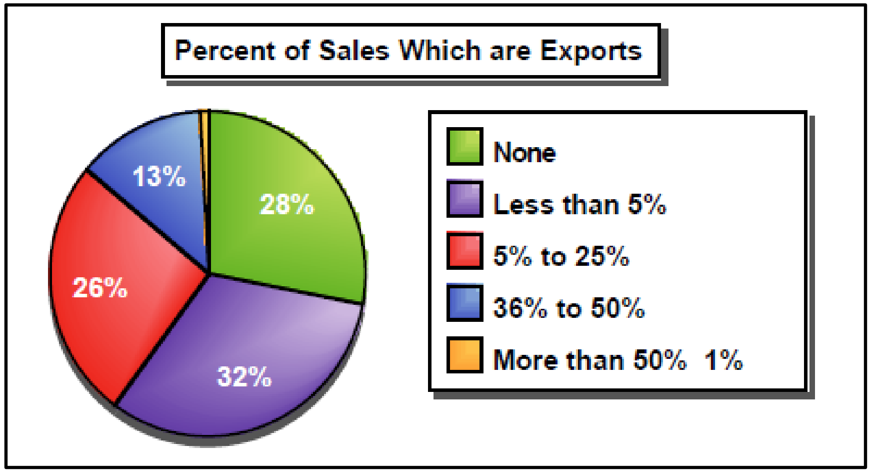
Over the next three years, 71% of respondents believe their capital investments will increase–10% of respondents believe their investment will increase over 20%. (Note: n=92.)



5. Percent of Sales Which are Exports

(What percent of your sales do exports represent?)

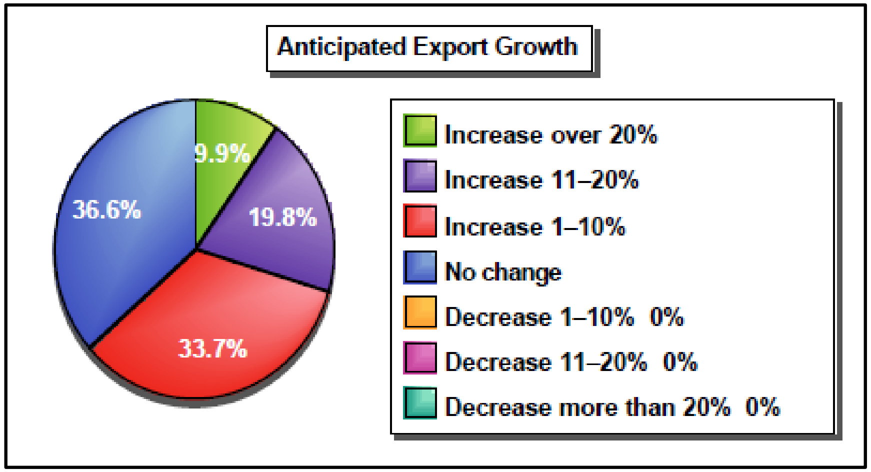
Seventy-two percent of respondents indicated at least some of their sales are from exports–32% indicated exports are less than 5% of their overall sales and 26% export 5% to 25% of their overall sales. (Note: n=92.)



6. Anticipated Export Growth

(Over the next three years, what do you expect to happen with the level of exports from your company?)

Just under two-thirds of respondents expect exports to increase, the remaining respondents do not project a change. (Note: n=92.)

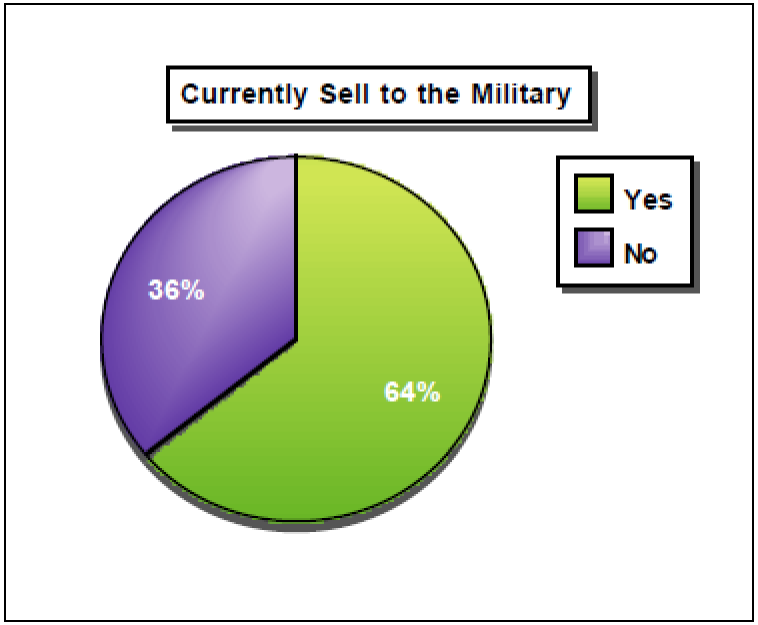


7. Currently Sell to Military

(Do you sell to the military?)

Almost two-thirds of respondents (64%) currently sell to the military. (Note: n=92.)

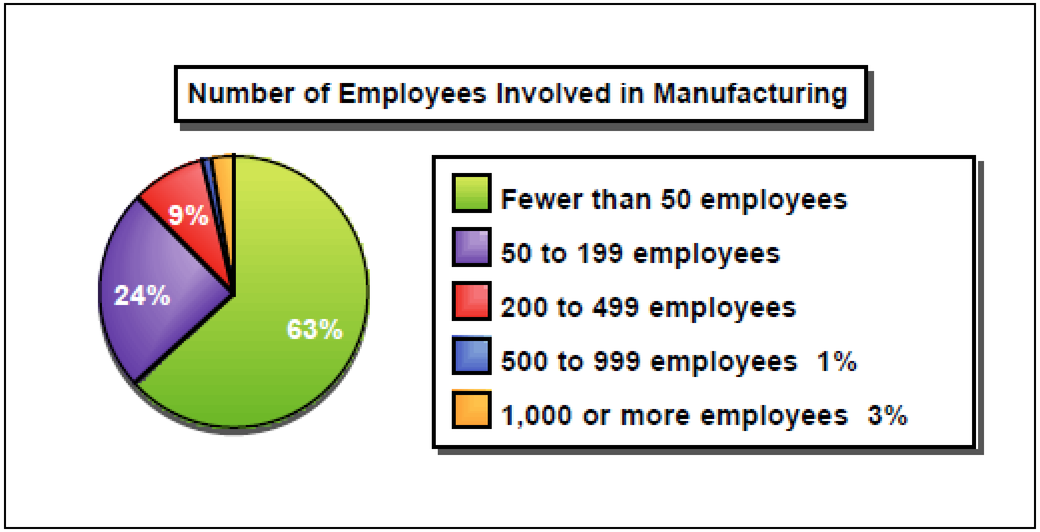
Of those who sell to the military, on average about 8.5% of their overall sales are to the military, from a low of about 1% to a high of about 25%.



1. Current Employment

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

Just less than two-thirds of member companies have fewer than 50 employees; 4% have 500 or more employees. (Note: n=92.)

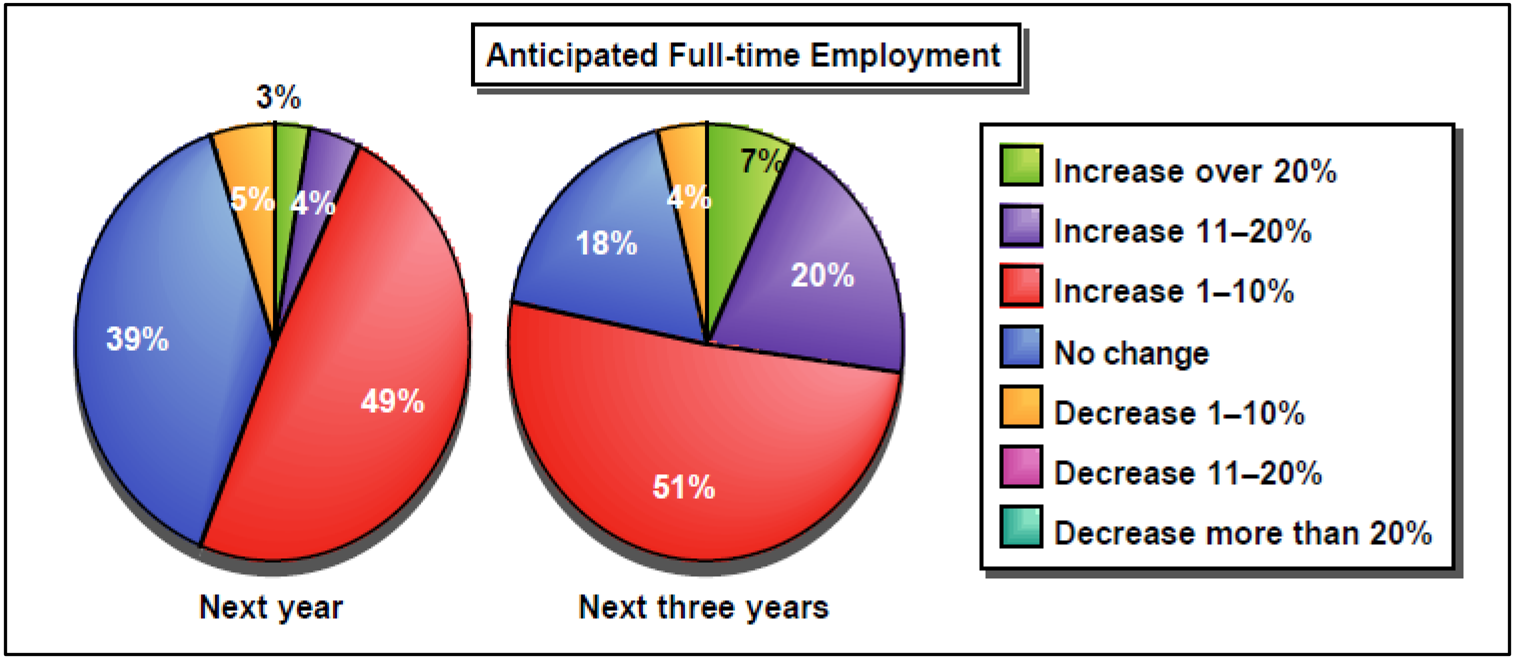


FAMA Spring Meeting 2012

2. Anticipated Employment

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

During the next year, the majority of members believe full-time employment will increase (56%) or stay the same (39%). Over the next three years, 78% of members believe full-time employment will increase. (Note: n=92.)



1. Concern about Various Issues

(How concerned are you about each of the following issues? Please rate on a scale of 1 to 5, where 1=does not impact my business and 5=keeps me up at night.)

Health care costs and the overall economic conditions are what keep members up at night. The housing market and energy costs are the least worrisome. (Note: n=92.)

	Keeps me up at night (5)	(4)	(3)	(2)	This does not impact my business (1)
Health care costs	32%	35%	21%	10%	2%
Overall economic conditions/general sales declines	32%	41%	24%	3%	0%
Funding/budgets	28%	41%	21%	9%	1%
Insurance costs	23%	36%	21%	15%	4%
Industry conditions	17%	45%	28%	7%	3%
Federal regulation	14%	38%	25%	15%	8%
Competition	14%	23%	39%	18%	5%
Federal taxes	11%	27%	28%	25%	8%
State/local taxes	10%	24%	28%	29%	8%
Liability	10%	20%	30%	34%	4%
Availability of credit	9%	15%	29%	33%	13%
Cost of raw materials	9%	40%	32%	13%	7%
Housing market	8%	20%	25%	27%	20%
Energy costs	3%	35%	38%	18%	4%
Other	3%	5%	14%	13%	21%

2. Strategies Using for Economic Times

(Which of the following strategies are you using to get through these tough economic times?)

Two-thirds of members are trying to become more diversified by entering new markets as one of their strategies. Forty percent indicated that this is their primary strategy. Only eight percent are utilizing green technologies. (Note: n=92.)

Becoming more diversified by entering new markets	66%
Focusing more on exports	46%
Focusing on higher margins	42%
Becoming more specialized by focusing on niche markets	41%
Becoming more diversified by entering new markets or focusing on several markets	40%
Developing partnerships/outsourcing	24%
Becoming a low cost provider	18%
Other	13%
Utilizing green technologies	8%

3. Effectiveness of Communication Strategies

(Please rate the effectiveness of each of the following methods used to market your products, where 1 is not at all effective and 5 is extremely effective.)

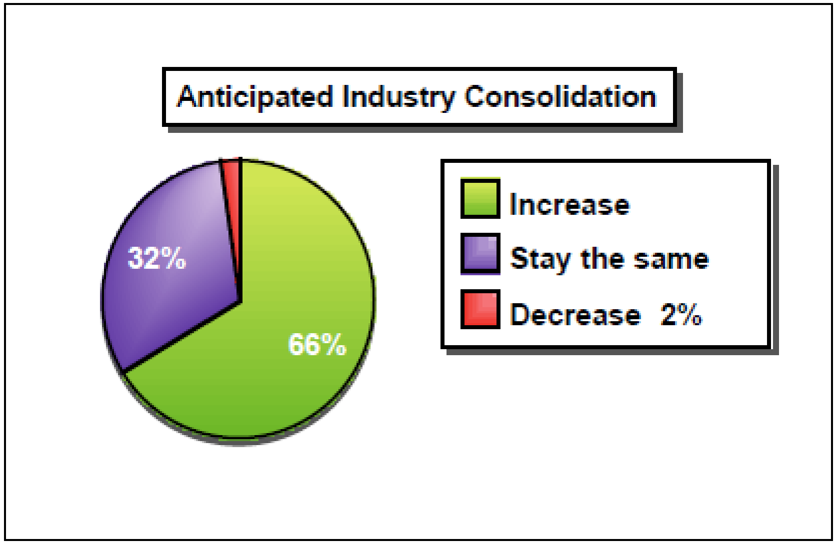
Most of the members believe their websites is most effective in marketing their products; Twitter is the least effective. (Note: n=92.)

Mean Avg. 1=not at all effective, 5=extremely effective	
Website	3.8
Facebook	2.2
Twitter	2.3
Other	3.2

4. Anticipated Industry Consolidation

(What is your opinion on industry consolidation?)

Two-thirds of respondents believe industry consolidation will increase and 32% believe it will stay the same. (Note: n=92.)



Break

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Open Mike

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Open Mike Topics

Membership Meeting format and content:

- How to keep manufacturers engaged
- What content provides added value
- Round table – similar to Fall Meetings
- Higher quality speakers; industry or business
- Format changes that would make the meetings more effective

Open Mike Topics

Membership Meeting venue and timing changes:

- Business vs resort hotels, fixed rotation
- 1-1/2 or 2 full days of meetings
- Timing of meeting during the week/weekend

(e.g Sunday pm start, Monday Board and Committees, Tuesday and Wednesday Membership meetings)

- Hospitality Suite – yes, no, charge

64 RESULTS

Open Mike Topics

FAMA - SPECIAL MEMBER SURVEY - APRIL 2, 2012	
What influences your decision to attend the meeting?	
(Rank the 7 choices below from 1 - 7 with 7 being the most important.)	
Topic	**RANK**
Opportunity to Network	7
Members Attending	6
Meeting Content	4/4
Business Speaker	4/4
Location	3/5
Email Blasts	2
Other	1

Open Mike Topics

Comments (under "Other")	RANK	1	2	3	4	5	6	7
Timing						1		
Cost						1		
Resort location							1	
Company expects me to be here		1						
More focus on new NFPA, EPA regulations						1		
Technical information								1
NFPA points of change								1
EPA/DOT/NTSA impacts								1
Get to meet Phil Gerace in person								1
Topic discussions on how to grow sales of apparatus/improve safety/lobby government for funding (1)								
Today's meeting and agenda were very good - "Open Mike" was very helpful								

[Certain large companies] will always have a presence at these meetings. Helps if costs can be held down. To that end, location is a factor.

Open Mike Topics

Membership Meeting venue and timing changes:

- Business vs resort hotels, fixed rotation
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- Timing of meeting during the week/weekend
(e.g Sunday pm start, Monday Board and Committees, Tuesday and Wednesday Membership meetings)
- Hospitality Suite – yes, no, charge

- Unfinished Business
- New Business

Closing Remarks

Meeting Survey On Line

Please go to the link below and fill out the meeting survey:

www.zoomerang.com/Survey/WEB22F9RUVG228

Next Meeting:

FAMA/FEMSA Fall Membership Meeting
Glendale, AZ
September 26 -29, 2012

Safe Travels