

2015 Spring Conference Book

# American Ladder Institute

# Tucson, Arizona March 8–10, 2015



Sunday, March 8

### ALI 2015 SPRING MEETING LOEWS VENTANA CANYON RESORT TUCSON, ARIZONA SUNDAY, MARCH 8 – TUESDAY, MARCH 10



### SCHEDULE OF EVENTS

2:00pm - 5:00pm	Board of Director's Meeting	Santa Rita
6:00pm – 8:00pm	Welcome Reception / Dinner	Cascade Terrace
Monday, March 9		
7:00am - 7:30am	Continental Breakfast (Available until 9:00am for guests)	Executive Board Room
7:30am – 8:30am	Strategic Planning Session	Santa Rita
8:30am – 9:00am	Standards Committee / Product Liability	Santa Rita
9:00am – 10:00am	Outreach / Education Committee	Santa Rita
10:00am – 10:15am	Break	Santa Rita
10:15am – 11:00am	Material Supply Committee	Santa Rita
6:00pm	Meet for Associates Event	Trail Dust Town
Tuesday, March 10		
7:00am – 7:30am	Continental Breakfast (Available until 8:30am for guests)	Ventana Dining Room
7:30am – 8:00am	Conference Committee	Santa Rita
8:00am – 8:15am	Associate Committee	Santa Rita
8:15am – 8:30am	General Business Meeting	Santa Rita
8:30am	Adjourn	



## ALI 2015 Spring Conference Attendee List

Company	Name	City
American Ladder Institute	Susan Lane	Chicago, IL
	Kat Seiffert	Chicago, IL
American Roll Form Products	Rob Touzalin	Painesville, OH
	Susan Eaton	Painesville, OH
Babcock/Bauer Co., Inc.	Eric Medley	Kinston, NC
Goshen Stamping Company	Jerry Trolz	Goshen, IN
Little Giant Ladder Systems	Ryan Moss	Springville, UT
Louisville Ladder Inc.	Tom Schmitt	Louisville, KY
Lynn Ladder & Scaffolding Co. Inc.	Alan Kline	Lynn, MA
Strongwell Corporation	Keith Liskey	Bristol, VA
	Bonnie Liskey Todd Berthold	Bristol, VA Bristol, VA
Tri-Arc Manufacturing	Ron Schwartz	Pittsburgh, PA
Werner Co.	Dave Plotner	Greenville, PA
Valley Faster Group	Manny DeSantis	Aurora, IL
	Cheryl DeSantis	Aurora, IL



### AMERICAN LADDER INSTITUTE

Strategic Plan 2014-2016 Revised: February 2015

#### **MISSION**

The mission of the American Ladder Institute is to promote the safe use of our products as well as to advance the common business interests of our members through a commitment to:

- > Development and dissemination of appropriate standards.
- > Education of the public as to the proper selection, care and safe use of ladders.
- > Representation of the interests of its members.

#### SIGNIFICANT ACCOMPLISHMENTS (In Past 10 Years)

- ✓ Put ALI on a sound financial footing by cost containment, dues adjustments, and standards pricing policies. Increased net assets from under \$100,000 to over \$500,000.
- ✓ Published and sold ANSI A14 standards.
- ✓ Added Tech Street and IHS as standards sellers along with ANSI.
- ✓ Added a new standard (ANSI A14.8).
- Developed and launched an online multimedia training program (MTP) with separate modules for step, extension and single, articulating, and mobile ladders.
- ✓ Upgraded all modules including: incorporating user suggestions, making the modules "responsive" for use on mobile devices and generally upgrading and improving usability and functionality.
- ✓ Developed all modules in Spanish as well as English.
- ✓ Develop relationships with the National Safety Council and Others.

#### **STRATEGIC INITIATIVES**

#### EDUCATION/PROMOTION OF SAFETY

The ALI is committed to the education of the public as to the proper selection, care and safe use of ladders.

#### Tactics

- Conduct a bi-annual review of all existing training modules to keep the modules current and to incorporate valid user feedback and constructive criticism.
   Who: Standards – Step Ladder
   When: Spring 2015
- Add a training module on lifting, handling and transporting ladders (Consider adding new module for Lifting, Handling in 2016)
   Who: Outreach Committee and Standards Committee
   When: By the end of 2016



 Consider adding a training module on the Top 10 typical causes of ladder accidents (OSHA Top List)

Who: ALI Conference Attendees

When: By the end of 2015

- Consider adding an app with quick recommendations for safety, by ladder type. Who: ALI Conference Attendees When: By the end of 2015/2016
- Partner with OSHA on sharing of safety resources/training. Who: ALI When: Ongoing
- Upgrade the ALI website including integrating the laddersafety.org website into the ALI website.
   Who: Smith Bucklin
   When: Q4 2014
- Add a minimum 150,000 new registered users to multimedia training program (MTP) each year (see Public Relations below).
   Who: Outreach Committee/Smith Bucklin When: Ongoing
- Expand relationship with other safety organizations to include but not be limited to:
  - National Safety Council
  - Scaffolding
  - Window Cleaners
  - o VPPPA
  - o AGC
  - Home Builders
  - Who: All

When: Ongoing

#### **PUBLIC RELATIONS**

The ALI is committed to expanding its influence and the awareness of its mission and programs related to ladder safety with the safety community and with all ladders users.

#### Tactics

- Encourage ALI members to utilize the ALI logo which includes the ladder safety training.org website info on ladders.
  - Who: Outreach Committee President When: Ongoing
- Review website for functionality, appearance, navigability, and to assurance all information is current.

Who: Outreach Committee and ALI Conference Attendees (Encourage ALI member companies to help review modules, web sites)



When: Annually before Spring meeting for discussion at that meeting

- Develop and maintain a comprehensive marketing plan to promote and create awareness of the ALI safety training resources to include:
  - Paid advertisements
  - Development and dissemination of articles on the MTP including endorsements
  - Search engine optimization including Google Ad Words
  - Consideration of direct mail campaigns
  - Searching for opportunities for free radio and TV promotions
  - YouTube

Who: Smith Bucklin and Outreach Committee

When: Ongoing

• Identify publications and other media, print and electronic, to most effectively reach ladder users. Reach out to safety directors of major corporations, develop list for marketing purposes.

Who: SmithBucklin and Outreach Committee When: 2015

- Establish and maintain a social media presence.
   Who: SmithBucklin and Outreach Committee
   When: 2015
- Consider opportunities to promote MTP to DIY ladder users. Who: SmithBucklin and Outreach Committee When: 2015
- Address the high ranking of ladders on the OSHA top ten citations list (movement from #7 to #3).
   Who: Board of Directors and Staff
   When: 2015

#### ANSI STANDARDS CREATION AND MAINTENANCE

Continually review, revise and release standards related to the design and construction of safe ladders. Specific planned actions during the planning period related to the creation and maintenance of standards are as follows:

 By December 31, 2015 A14.2 A14.5 A14.7 New: 14.11



 By December 31, 2016 A14.3 A14.4 A14.9

Increase ALI's influence to A14 Committee to keep on schedule.

#### **ORGANIZATIONAL SUSTAINABILITY**

#### 1. Maintain financial stability

#### Tactics

- Evaluate the dues structure bi-annually at the spring meeting starting in 2015. Dues were last raised 3 years ago.
   Who: Board of Directors
   When: Every other Spring meeting
- Evaluate standard sales and pricing annually at fall meeting starting in 2015.
   Who: Board of Directors
   When: Spring meeting 2015
- Evaluate conference registration fees at spring meeting starting in 2015. Look at guest pricing and consider actual cost of meals. Evaluate pricing for more than one person from each company to attend the Conference.
   Who: Board of Directors
   When: Every Spring meeting
- Review financial performance monthly and at every meeting.
   Who: Board of Directors
   When: Monthly
- Review ANSI standards sales contract for renewal. Who: Board of Directors When: Annually at Fall meeting
- Review Tech Street and IHS standards sales contracts for renewal.
   Who: Board of Directors
   When: Annually at Fall meeting
- Continually search and solicit new regular and associate members including attempting to convince former members to rejoin
   Who: Board of Directors
   When: Annually at Fall meeting



#### 2. Create and maintain membership value

#### Tactics

- Maintain ALI position in ANSI A14 standards development, publication and sales. Who: SmithBucklin, Board, Standards Committee When: Ongoing
- Maintain ALI's position as the foremost resource in the ladder industry for safety training and education.
   Who: SmithBucklin, Board
   When: Ongoing
- Conduct interesting and informative semi-annual meetings Who: Board, Staff and Outreach Committee When: Ongoing
- Search for new ways to advance the credibility and stature of the ALI, the ALI members, and the ladder industry as a whole
   Who: Board, SmithBucklin
   When: Ongoing
- Continue to list ALI members on all MTP modules thereby providing value by identifying the companies responsible for the training. Modify these lists to keep current. Who: SmithBucklin When: Ongoing
- 3. Conduct a SWOT exercise bi-annually

#### Tactics

- In order to assess the members' perceptions of strengths, weaknesses, opportunities and threats, conduct SWOT brainstorming sessions
   Who: President or designee to moderate the session
   When: Bi-annually at the fall meeting (Note: The recap of the 2014 SWOT Analysis is included as Appendix 1 to this plan)
- Use the SWOT analysis results to make and changes the members consider proper and advisable in the then current plan, and use as input for the subsequent plan Who: All When: After each SWOT exercise
- 4. Clearly define and publish the services provided by the ALI Association Management firm

#### Tactics

 Outline the scope of support services provided broken down by category Who: Smith Bucklin When: Early 2015 (Note: This Scope of Support Services is included as Appendix 2 to this plan)



 Review the General Services Agreement annually and update it for the next calendar year as necessary and appropriate Who: Smith Bucklin/ Board of Directors When: Annually between the Fall and Spring meetings

## 5. Create a Strategic Marketing Initiatives and Investments document for each calendar year as a supplement to this Strategic Plan

#### Tactics

• Assess the ALI Strategic Plan and prepare a marketing document detailing ideas, concepts and projected costs to accomplish Strategic Plan initiatives during the calendar year

Who: Smith Bucklin for acceptance by the Board of Directors When: Annually in January for that calendar year (**Note: This document for 2015 is included as Appendix 3 to this plan**)



## **APPENDICES TO ALI STRATEGIC PLAN**

**APPENDIX 1** - RECAP OF 2014 SWOT ANALYSIS

**APPENDIX 2** - SMITH BUCKLIN SCOPE OF SERVICES FOR 2015

**APPENDIX 3** - STRATEGIC MARKETING INITIATIVES AND INVESTMENTS

### APPENDIX 1: RECAP OF 2014 SWOT ANALYSIS

The information below was captured during the SWOT Analysis brainstorming session at the Fall 2014 Meeting, and then referenced during the strategic planning session.

#### Strengths:

- Combined knowledge of members/committees
- Effective as ANSI accredited developer of standards
- Financially strong
- Strong Ladder safety web site
- Can speak for the industry members make more than 90% of ladders being made in North America
- Access to markets; influence to users via relationships
- Credibility in marketplace

#### Weaknesses:

- Don't share pertinent info, business statistics that would help ALI
- Volunteer pool limited
- Limited resources to share safety message
- Don't need to belong to ALI to be on A14 Committee
- Inability to change unsafe user habits; don't have sufficient influence
- Lack of metrics to determine ALI's influence, impact

#### **Opportunities:**

- Bring other rolling ladder manufacturers into ALI; increase membership
- Increase safety training registration numbers
- Improved maintenance of the ANSI standards process
- Exert greater influence on the ANSI committee to address safety issues (codes requirements)
- Potential for strong relationships and alliances with other trade associations
- Create stronger relationship with OSHA and other safety organizations

#### Threats:

- Replacement of ladders via technology
- Legislation to outlaw use of certain types of ladders or limit the use of ladders
- Litigation against ALI, not industry
- Insurance costs to manufacturers
- Differing perspectives of ALI, A14 Committee and manufacturer leadership
- Standards respond to marketplace; may be slow to act

### APPENDIX 2: SMITH BUCKLIN SCOPE OF SERVICE

#### **GENERAL ADMINISTRATION SERVICES**

#### **Daily Activities:**

- 1. Handle and respond to all inquiries from members, leaders, media and the public regarding ALI, ALI activities, ALI's Ladder Safety Training, and A14 Standards.
- 2. Maintain all legal records in accordance with the IRS and state of incorporation requirements.
- 3. Maintain general corporate files including membership reports, position statements, and membership correspondence.
- 4. Handle legal correspondence as appropriate.
- 5. Update standard operating procedure manual, as necessary.

#### Weekly Activities:

- 1. Process Accounts Payable.
- 2. Generate Accounts Receivable invoices.
- 3. Maintain communication with key board members and volunteers.

#### **Monthly Activities:**

- 1. Perform all headquarters activities to maintain the day-to-day operations of ALI, including the supervision and performance of staff.
- 2. Prepare journal entries.
- 3. Generate & maintain reports as requested.
- 4. Set team meeting schedule and prepare plans for all projects, including charters and specific deliverables for major initiatives.
- 5. Review and evaluate monthly financial statements.
- 6. Disseminate monthly financial statements to board or a subset thereof as designated by ALI.
- 7. Monitor revenue to ensure it is in line with budget assumptions and recommend expense adjustments to off-set any variances in actual revenue received.
- 8. Prepare comprehensive management report of activities, operations and finances for review by the Board of Directors.
- 9. Review for accuracy all marketing and communication messages.

#### Yearly Activities:

- 1. Develop an annual work plan to accomplish the goals identified in the strategic plan.
- 2. Support the Certified Public Accountant to conduct the annual audit.
- 3. Provide work papers and information to support the annual audit.
- 4. Recommend and implement pertinent financial policies as necessary and approved by Board of Directors (i.e. Investment policy, Expense Report policy, Fund-Balance policy).
- 5. Coordinate annual budget activities.
- 6. Draft budget to be presented to the board by an agreed upon deadline.
- 7. Provide accounting with approved budget, by month.
- 8. Prepare a financial forecast on a quarterly basis.
- 9. Ensure that the ALI is adhering to its bylaws and policies in its daily operations.
- 10. Ensure appropriate filings to maintain incorporation status.
- 11. Assist in developing investment/financial policies to foster long-term financial health of organization.

#### MEMBERSHIP SERVICES

#### **Daily Activities:**

- 1. Process all membership dues from lockbox, mail, phone and web site.
- 2. Process membership refunds.
- 3. Handle all general membership inquires via phone, fax and email.
- 4. Input new member applications into database and update renewals.
- 5. Update membership information.
- 6. Provide and maintain overall database management.
- 7. Review and update web site membership areas.

#### Weekly/Monthly/Annual Activities:

- 1. Create and mail membership information to prospective members.
- 2. Create and mail membership renewal letters/dues invoices.
- 3. Implement the conversion to a calendar year membership renewal cycle.
- 4. Provide Board of Directors with a membership report.
- 5. Monitor the board and membership pages of the Web site to ensure accurate and current information.
- 6. Review all printed and electronic pieces regarding membership to ensure accurate and current information.
- 7. Support the Standards Committee scheduling meetings.
- 8. Maintain membership application and update as necessary.
- 9. Ensure that online membership directory is maintained and operates smoothly.
- 10. Perform membership/registration database cleanup & quality checks.
- 11. Maintain membership administration and marketing plan, including standardized report on membership renewals and new members.
- 12. Maintain standard royalty payments.

#### Year-round Activities:

- 1. Oversight of all ALI programs including:
  - a. Membership the retention of members, processing of new membership, preparation of dues invoices, generation of membership reports, updating and maintenance of the membership database.
  - b. Spring Conference
  - c. Fall Conference
  - d. LadderSafetyTraining.org
  - e. ALI Web site review and update the web site in to reflect current LMA programming and services.
  - f. Support the Nominations/Election process for the ALI Board of Directors

#### A14 STANDARDS

#### Daily/Weekly/Monthly/Annual Activities:

- 1. The Executive Director to serve as the Secretariat to include the following duties:
  - Organize and provide operational support to the A14 Committee including secretarial services; meeting notices and arrangements; preparation and distribution of meeting agendas, minutes, ballots, and draft standards; and maintenance of adequate records.
  - Maintain ANSI accreditation in accordance with ANSI requirements, including maintaining and submission of all required documentation. E.g. A14 Committee Procedures, meeting and ballot records, committee roster, ANSI filings for revising, public review and approval of standards.
  - Oversee the Committee's compliance with the Committees procedures.
  - Maintain a roster of the Committee and a list of Standards for which the Committee is responsible.
  - Provide, upon request, the affiliation and interest category of each member of the ASC A14.
  - Plan and provide for an annual Spring and Fall Committee meeting.
  - Submit candidate standards approved by the Committee, with supporting documentation, for ANSI review and approval as American National Standards.
  - Publish or arrange with ANSI for publication of its standards, revisions, and addenda
  - Perform other administrative functions as required by the Committee procedures.
- 2. Monitor and maintain the contractual relationships with ANSI, Techstreet and IHS.
- 3. Record and allocate monthly and quarterly standard sales accordingly as reported by ANSI, Techstreet and HIS.
- 4. Evaluate and respond to all requests for standard interpretations and comments.

#### **BOARD AND COMMITTEE MEETINGS SERVICES**

#### Year-round Activities:

- 1. Communicate with board members and staff regarding dates & location of board meetings.
- 2. Coordinate board meeting site logistics with conference planner and/or Executive Director.
- 3. Coordinate board agenda and materials with President, Executive Director and staff.
- 4. Coordinate dissemination of board agenda and materials.
- 5. Distribute pre-meeting materials for conference call and face-to-face meetings.
- 6. Prepare, maintain and distribute board minutes.
- 7. Participate and support the Standards Committee.

#### **MARKETING & COMMUNICATION SERVICES**

#### Year-round Activities:

- 1. Serve as strategic marketing counsel and participate in board of directors meetings/calls as appropriate.
- 2. Attend Board of Directors meetings and provide status reports as appropriate.
- 3. Develop annual marketing/communications plan to promote ALI membership (new member acquisition and retention), products and services.
- 4. Provide management oversight and counsel for all ALI MCS projects as assigned in the budget.
- 5. Provide counsel and recommendation(s) on industry research conducted by third-party and on membership recruitment campaign conducted by third-party.
- 6. As necessary, assist with Headquarters/staff presentations to the Board of Directors.
- 7. In coordination with the Administrative staff, lead updates and overall maintenance of the ALI website as included in the budget to ensure quality control, optimization for search engines and adherence to style guidelines.
- 8. Lead or assist in communications (drafting, editing and/or reviewing, as appropriate) to ensure quality control, consistency of ALI style guidelines and professionalism.
- 9. Provide management oversight of ALI social media channels as the community manager and coordinate with ALI volunteers to enhance ALI's social media reach.
- 10. Place targeted advertisements (social, search engine, online, print, e-newsletter) as outlined in the marketing plan.
- 11. Coordinate with partner organizations and associations for media trades and advertising opportunities.
- 12. Maintain the integrity of the ALI brand by furthering its presence as the go-to resource for ladder standards, including the creation of such content as a Ladder Safety Toolbox Kit.
- 13. Analyze metrics regarding the website and all outbound marketing activities on a quarterly basis, including the use of Google Analytics.

#### **EVENT SERVICES**

#### Spring and Fall Conference

#### Site Selection & Contract Management – Activities

- 1. Send a request for proposal to host the future meeting.
- 2. Draw up a Request for Proposal (RFP) that accurately represents preferred meeting pattern, the required sleeping room block, meeting room space and concessions from the hotel.
- 3. Release this RFP to the hotel community in the cities the association has indicated.
- 4. Work with SmithBucklin national sales representatives, city representatives as well as property sales representatives to ensure timely replies.
- 5. Compile a comparison report of proposals and offer a recommendation
- 6. Show cost and concession comparison between properties.
- 7. Show how each property can or cannot meet usual budget parameters
- 8. Show how each property can or cannot meet attendee travel parameters and destination desirability.
- 9. Recommend one of the options to the association with supporting analysis.
- 10. Solicit and negotiate contract with Association selected venue

- 11. Using SmithBucklin Event Services contract with our proprietary clauses, negotiate a contract that mitigates financial risk to the client to the extent possible.
- 12. Ensure the contract accurately reflects the desired sleeping rooms, meeting space and concessions.
- 13. Present contract for Association approval
- 14. Draw up a contract liability statement to present to association staff to accompany contract.
- 15. Review liability statement with staff pointing out financial risk factors of the contract and parameters affecting the meeting.
- 16. Correspond with venues that were not selected
- 17. Notify properties and national sales representatives of the decision and reasoning

#### Logistics Management – Activities

- 1. General logistical management for the following areas:
  - Audio Visual
  - Busing (if required)
  - Shipping
  - Signage
- 2. Food and Beverage Assumes responsibility for creation of all
- 3. Specs/Schedule of Events Includes compiling all relevant information, creation, review/maintenance of specs and banquet event orders, hotel contact and final arrangements with hotel/conference center
- 4. Hotel main liaison Includes securing/maintaining relationship with hotel sales/convention/banquet contacts, negotiates F&B needs, updates and follows contractual responsibilities
- 5. Housing Tracks, reports and distributes pick-up, maintains relationship with hotel reservation contacts
- 6. Receptions Assumes coordination for special arrangements in conjunction with Special Receptions
- 7. Provide best practices counsel to conference committee

#### **TECHNOLOGY INFRASTRUCTURE & WEB SUPPORT**

Activities supported by Information Technology Services (ITS) on behalf of ALI:

- a. Web Site Hosting
- b. Membership Database Hosting & Support
- c. Infrastructure for Headquarters Staff
- d. Web Site Development & Online Management
- e. Other Technology Services Projects

ITS will be proactive in suggesting new products, services, updates and pages to ALI web site in support of the strategy and business of the organization, including leading the migration of the website to the new YourMembership platform. ITS will have regular and open communication with appropriate volunteers and staff team members.

Technology related activities not supported by ITS. The following normal activities are accomplished using technology tools, but use of those tools falls within the scope of other staff on the ALI team.

- a. Creating (and in some cases posting) Web site content.
- b. Managing content and information within specific web-based tools (such as Discussion Forums, Blogs, RSS Feeds, etc.).
- c. Data entry and management of Membership data within YourMembership.

#### Year-round Activities:

- 1. Web site hosting: All hardware, software and technical administrative personnel needed to support ALI web pages. This includes ancillary services, such as password protection of various pages and providing secure encryption for credit card payment details.
- 2. Web Production: Navigation and graphical updates to ALI's web pages as needed, as well as creation of new content areas as requested.
- 3. Project Management: Site planning and strategy, project planning, troubleshooting, support of strategic initiatives or organization through technology related projects and promotion of the site.
- 4. Web Development: Custom software development as requested, scoped and approved by ALI.
- 5. Custom reporting: Reports developed as requested and approved by ALI.
- 6. Communication with appropriate volunteers and staff team members.
- 7. Quality assurance is provided through testing of requests based upon submitted information. If an issue is surfaced where requirements are not met, ITS will correct within an agreed upon timeframe and at no additional cost to ALI.
- 8. SmithBucklin ITS will follow general project management guidelines and provide ALI with a Statement of Work and budget impact before commencing any work—with the exception of normal, day to day Web site updates through the ITS Support Center.
- 9. SmithBucklin will provide ALI with monthly reports and analysis regarding Web traffic and planning updates.
- 10. SmithBucklin Web Services professional staff will provide support and will manage all third party vendors related to technology.

#### FINANCIAL MANAGEMENT & ACCOUNTING SERVICES

#### **Daily Activities:**

- 1. Facilitate accounts receivables.
- 2. Maintain daily cash position.

#### Weekly Activities:

1. Facilitate accounts payable process.

#### **Monthly Activities:**

- 1. Create, enter and post all journal entries.
- 2. Update chart of accounts when changes are indicated (for example, to add new programs).
- 3. Reconcile cash accounts to bank statements.
- 4. Account for investment income and portfolio valuation.
- 5. Prepare account analyses on all other balance sheet accounts, including those due to SmithBucklin account, to ensure accurate financial statements.
- 6. Provide support for the divisions during their reconciliation of registration and sales records to the general ledger, usually by printing out the general ledger.

- 7. Provide an accounts receivable status report to the administrative team.
- 8. Print, review and distribute monthly financial statements.
- 9. Research and respond to questions from ALI or staff regarding financial activity, accounting control processes and accounting principles.
- 10. Maintain financial records for seven years to facilitate research, support the annual audit, and comply with Internal Revenue Service retention requirements.
- 11. Maintain monthly cash flow actuals, budget and forecast by program.
- 12. Recommend strategies to improve association cash position and financial stability.
- 13. Coordinate and prepare information for meetings of the Board.

#### **Year-round Activities**

- 1. Prepare work papers and provide support for annual audit.
- 2. Post audit adjustments and reconcile general ledger to audited financial statements.
- 3. Coordinate distribution of 1099s.
- 4. Upload excel budget that has amounts allocated to appropriate months.
- 5. Coordinate investment request for proposal.
- 6. Facilitate training of incoming treasurer with an orientation program.

### APPENDIX 3: STRATEGIC MARKETING INITIATIVES AND INVESTMENTS

The ALI Board of Directors reviewed and approved the \$50K marketing initiatives and investment plan outlined below. \$50K was included in the 2015 budget. The full plan is provided in full detail for review purposes only.

### AMERICAN LADDER INSTITUTE

#### 2015 Strategic Marketing Initiatives and Investments

The mission of the American Ladder Institute is to promote the safe use of our products as well as to advance the common business interests of our members through a commitment to:

- > Development and dissemination of appropriate standards.
- > Education of the public as to the proper selection, care and safe use of ladders.
- Representation of the interests of its members.

In support of that mission, the following plan has been organized and structured to directly support the organization's key strategic initiatives outlined in the 2015 Strategic Plan:

- I. 2015 Education/Promotion of Safety
- II. 2015 Public Relations Initiatives
- III. Organizational Sustainability
- IV. Overview of 2015 Strategic Marketing Initiatives and Investments

Note: The initiatives identified are pulled directly from the 2015 Strategic Plan.

#### I. 2015 EDUCATION/PROMOTION OF SAFETY

The ALI is committed to the education of the public as to the proper selection, care and safe use of ladders and has outlined the following strategic initiatives to be undertaken in 2015. This marketing plan identifies which initiatives can be accomplished at the various levels of investment. For instance, the goal of "expanding relationships with other safety organizations" can and will be accomplished at any investment level; however, adding a mobile app can be accomplished at a \$75k or \$100k investment level, but not at the \$50k investment level as outlined.

Proposed Board Initiatives for 2015	\$50k Investment	\$75k Investment	\$100k Investment
Consider adding a training module on the Top 10 typical causes of reported citations regarding ladders (OSHA Top List)	Х*	Х	Х
Add a minimum 150,000 new registered users to multimedia training program (MTP) each year	Х	Х	Х
Expand relationship with other safety organizations	Х	Х	Х
Consider adding an app with quick recommendations for safety, by ladder type		Х	Х

Upgrade the ALI website including integrating the laddersafety.org website into the ALI website

\* Marketing will disseminate information about the Top 10 typical causes of reported citations regarding ladders – not create a training module.

## Consider adding a training module on the Top 10 typical causes of reported citations regarding ladders (OSHA Top List)

<u>Note:</u> Marketing will disseminate information about the Top 10 typical causes of reported citations regarding ladders and refer to existing training modules. Special attention will be given to roofing contractors and associated audiences as roofing contractors had the highest number of citations. This will not include the creation of a training module by marketing regarding this topic.

#### The following initiatives would be covered at the \$50,000 spend level:

• Disseminate top 10 typical causes of ladder accidents via social media campaigns and print advertisements, with a special emphasis on roofing contractors

## Add a minimum 150,000 new registered users to multimedia training program (MTP) each year

#### The following initiatives would be covered at the \$50,000 spend level:

- Utilize the National Safety Council and AGC's community to broaden awareness and increase the number of registered users
  - List rental of "Safety + Health" (NSC)
    - Leverage content marketing by working with Board members and volunteers to develop a Ladder Safety Toolbox Kit – utilizing the public domain information provided by OSHA – as a content-based incentive to navigate to the ALI site
  - Top tile advertisement in AGC "Safety Matters" newsletter for 12 months
    - The effectiveness of this e-newsletter advertisement would be monitored to ensure that it is returning a healthy return on marketing investment. Alternative options may be taken in the event that the advertisement is not producing the desired results.
- Increase presence of ALI website through:
  - Organic search optimization: Optimize website for search engines to increase in ranking for key search terms
  - Paid search advertising: Utilize Google AdWords campaigns to direct more traffic to the website to target company owners
  - Social media advertisements (e.g., LinkedIn / Twitter) in English and Spanish to target end users and consumers
- Ongoing community management of social media channels to engage with company users, end users and consumers and encourage the number of registered users

#### The following initiatives would be added at the \$100,000 spend level:

Х

- Increased level of social media advertisements both in Spanish and English, which would allow us the opportunity to reach more potential users in both language markets
- Integrate Laddersafetytraining.org into ALI website, thereby making it easier for users to find all of the information they are seeking in one, convenient place
- Deploy micro Web banner on AGC site for 12 months to increase awareness of the ALI training videos across an engaged audience
  - The effectiveness of this Web banner would be monitored to ensure that it is returning a healthy return on marketing investment. Alternative options may be taken in the event that the advertisement is not producing the desired results.

## Expand relationships with other safety organizations to include but not be limited to:

- National Safety Council
- o Scaffolding
- Window Cleaners
- o VPPPA
- o AGC
- Home Builders

<u>Note:</u> In addition to expanding relationships with other safety organizations, we recommend that steps are taken to form relationships with complementary organizations, such as the National Association of Independent Fee Appraisers (NAIFA), the National Lumber and Building Material Dealers Association (NLBMDA), the North American Building Material Distribution Association, the North American Wholesale Lumber Association (NAWLA) and the Restoration Industry Association (referred to "SmithBucklin Complementary Organizations" from this point forward). These organizations are all SmithBucklin clients, thereby may be more quickly inclined to form a mutually beneficial relationship.

#### The following initiatives would be covered at the \$50,000 spend level:

- Secure a 12-month top tile advertisement in the AGC "Safety Matters" newsletter to widen the awareness of ALI products
- Purchase a one-time 10,000 record list rental from Safety + Health Magazine from the National Safety Council to email regarding the ALI videos and leverage content marketing by working with Board members and volunteers to develop a Ladder Safety Toolbox Kit – utilizing the public domain information provided by OSHA – as a contentbased incentive to navigate to the ALI site
- Explore media trade opportunities to place advertisements on NSC, AGC and other key players' sites in exchange for advertisements on the ALI website
- Explore media trade opportunities with the SmithBucklin Complementary Organizations and negotiate agreements that are mutually beneficial

#### The following initiatives would be added at the \$75,000 spend level:

• Secure a Promo Video Loop (Up to 2 minute continuously looped video to play in large monitors located in highest cross-traffic areas of the Convention and Expo) at the 2015

AGC Technology & Construction Solutions Expo March 18 - 20, 2015 | San Juan, Puerto Rico

- Does not require attendance as an exhibitor
- This may be an opportunity for a media trade by AGC and ALI becoming collaborating organizations at each other's respective meetings/conferences

#### The following initiatives would be added at the \$100,000 spend level:

- Deploy micro Web banner on AGC site for 12 months
  - The effectiveness of this Web banner would be monitored to ensure that it is returning a healthy return on marketing investment. Alternative options may be taken in the event that the advertisement is not producing the desired results.

#### Consider adding an app with quick recommendations for safety, by ladder type.

#### The following initiatives would be covered at the \$75,000 spend level:

• Utilize year-round mobile app to share information and videos from ALI website (assumption: GenieConnect as the preferred provider), which will help distribution information regarding ladder safety to mobile-driven audiences (i.e., Generation X/Y, Hispanic American population)

## Upgrade the ALI website including integrating the laddersafety.org website into the ALI website

The following initiatives would be covered at the \$100,000 spend level:

• Integrate Laddersafetytraining.org into ALI website in order to create a cohesive, onestop-shop for all ladder safety information and training

#### II. 2015 PUBLIC RELATIONS INITIATIVES

The ALI is committed to expanding its influence and the awareness of its mission and programs related to ladder safety with the safety community and with all ladders users. In support of that commitment, the Board has outlined the following strategic initiatives to be undertaken in 2015. This marketing plan identifies which initiatives can be accomplished at the various levels of investment.

Proposed Board Initiatives for 2015	\$50k	\$75k	\$100k
	Investment	Investment	Investment
Encourage ALI members to utilize the ALI logo which includes the ladder safety training.org website info on ladders	Х	Х	Х
Review website for functionality, appearance, navigability, and to assure all information is current	Х	Х	Х
Develop and maintain a comprehensive marketing plan to promote and create awareness of the ALI safety training resources	Х	Х	Х
Identify publications and other media, print and electronic, to most effectively reach ladder users. Reach out to safety directors of major corporations, develop list for marketing purposes.	Х	Х	Х
Establish and maintain a social media presence	Х	Х	Х
Consider opportunities to promote MTP to DIY ladder users	Х	Х	Х
Address the high ranking of ladders on the OSHA top ten citations list (movement from #7 to #3)	Х	Х	Х

All of the following public relations initiatives can be accomplished at each level of spend.

## Encourage ALI members to utilize the ALI logo which includes the ladder safety training.org website info on ladders.

#### The following initiatives would be covered at the \$50,000 spend level:

- Create a media guide to accompany all distributions of the Ladder Safety Training videos and connections to website
- Build out page on website as a resource center for sharing, including the media guide, as well as social media community sharing best practices (i.e., "spread the word" Web page)

## Review website for functionality, appearance, navigability and to assure all information is current.

#### The following initiatives would be covered at the \$50,000 spend level:

- Content audit of top 40 pages of website to ensure that the content on the website it up to date, is written from the perspective of benefits to the user and is consistent in tone and voice for the ALI brand
- Optimize 15 high-value Web pages with SEO to make the site easier to find for potential users searching for key terms that have been pre-identified as important
- Identification and incorporation of news outlets and custom searches for home page news feed to keep website current with relevant information, which will help keep the home page of the website fresh without the need for original content on a weekly basis
- Expansion of website content with new Web pages of targeted content, as needed

#### The following initiatives would be added at the \$100,000 spend level:

 Integrate Laddersafetytraining.org into ALI website, which will make it possible to track user behavior through the ALI site and training videos section. This will also increase the SEO ranking of the ALI site as there would be one URL for which users would be visiting for all of ALI's offerings and information

#### Develop and maintain a comprehensive marketing plan to promote and create awareness of the ALI safety training resources to include:

- Paid advertisements
- Development and dissemination of articles on the MTP including endorsements
- Search engine optimization including Google Ad Words
- Consideration of direct mail campaigns
- Searching for opportunities for free radio and TV promotions
- YouTube

#### The following initiatives would be covered at the \$50,000 spend level:

• Develop a comprehensive marketing plan that includes list rentals, e-newsletter advertisements, social media advertisements (Spanish and English), media trade opportunities, media guide, search engine optimization, community management, search engine marketing (AdWords) and website content audit and maintenance

Note: If approved, the marketing plan would include all additional initiatives covered at the \$75,000 and \$100,000 spend level

Identify publications and other media, print and electronic, to most effectively reach ladder users. Reach out to safety directors of major corporations, develop list for marketing purposes.

#### The following initiatives would be covered at the \$50,000 spend level:

- Purchase a one-time 10,000 record list rental from Safety + Health Magazine from the National Safety Council to email regarding the ALI videos
  - Leverage content marketing by working with Board members and volunteers to develop a Ladder Safety Toolbox Kit – utilizing the public domain information provided by OSHA – as a content-based incentive to navigate to the ALI site
- Secure a 12-month top tile advertisement in the AGC "Safety Matters" newsletter to increase visibility and reach more ladder users/purchase influencers
  - The effectiveness of this e-newsletter advertisement would be monitored to ensure that it is returning a healthy return on marketing investment. Alternative options may be taken in the event that the advertisement is not producing the desired results.
- Explore media trade opportunities to place advertisements on NSC, AGC and other key players' sites in exchange for advertisements on the ALI website, which would help to widen ALI's influence while supporting collaborating organizations as well
- Explore media trade opportunities with the SmithBucklin Complementary Organizations and negotiate agreements that are mutually beneficial

 Optimize 15 high-value Web pages with SEO that helps to target ladder customers of major corporations (consumer and business)

#### The following initiatives would be added at the \$75,000 spend level:

- Secure a Promo Video Loop (Up to two-minute, continuously looped video to play in large monitors located in highest cross-traffic areas of the Convention and Expo) at the 2015 AGC Technology & Construction Solutions Expo March 18 - 20, 2015 | San Juan, Puerto Rico
  - o Does not require attendance as an exhibitor
  - This may be an opportunity for a media trade by AGC and ALI becoming collaborating organizations at each other's respective meetings/conferences

#### The following initiatives would be added at the \$100,000 spend level:

- Deploy micro Web banner on AGC site for 12 months to increase visibility and reach more ladder users/purchase influencers
  - The effectiveness of this Web banner would be monitored to ensure that it is returning a healthy return on marketing investment. Alternative options may be taken in the event that the advertisement is not producing the desired results.

#### Establish and maintain a social media presence.

#### The following initiatives would be covered at the \$50,000 spend level:

- Engage in community management of social media outlets all year-round to distribute information regarding ALI, safety information in general and build relationships with the ladder community
  - Assumption: Two volunteers could be identified to be social media community activists with monthly, half-hour meetings
- Deploy targeted social media advertising in English and Spanish to widen the potential audience of ALI's social media efforts and direct them to optimized landing pages on the website

#### The following initiatives would be added at the \$100,000 spend level:

 Increase in spend on English social media advertising further, allowing for greater flexibility to engage the ladder community and potential users throughout the year with social media advertising and boosted posts

#### Consider opportunities to promote MTP to DIY ladder users.

#### The following initiatives would be covered at the \$50,000 spend level:

- Utilize community management role, volunteer social media activists and social media advertising to spread the word of ladder safety to DIY ladder users
- Create a new Web page on the ALI site directed at DIY ladder users as a landing page for social media pushes

## Address the high ranking of ladders on the OSHA top ten citations list (movement from #7 to #3)

#### The following initiatives would be covered at the \$50,000 spend level:

- Utilize community management role, volunteer social media activists and social media advertising to spread the word of the high ranking of ladders on the OSHA top ten citations list
- Work with Board of Directors to craft a press release regarding this change to be published on the ALI website and disseminated through social media and media trade agreements, as agreed upon by collaborating organizations
- Include this fact in the email content for the "Safety + Health" (NSC) list rental
  - Leverage content marketing by working with Board members and volunteers to develop a Ladder Safety Toolbox Kit – utilizing the public domain information provided by OSHA – as a content-based incentive to navigate to the ALI site
- Work with collaborating organizations to spread the word of the importance of ladder safety
- Create a landing page on the ALI website regarding the top ten citations list and use that landing page in digital marketing initiatives

#### The following initiatives would be added at the \$75,000 spend level:

• Utilize this fact in the video displayed onsite at the AGC Expo to draw attention to the video and ALI as an organization

#### III. ORGANIZATIONAL SUSTAINABILITY

The ALI and its brand need to maintain their position for organizational sustainability and, as such, the Board has outlined the following strategic initiatives to be undertaken in 2015. This marketing plan identifies which initiatives can be accomplished at the various levels of investment.

All of the following organizational sustainability initiatives can be accomplished at each level of spend.

Proposed Board Initiatives for 2015	\$50k	\$75k	\$100k
	Investment	Investment	Investment
Maintain ALI position in ANSI A14 standards development, publication and sales	Х	Х	Х
Maintain ALI's position as the foremost resource in the ladder industry for safety training and education	Х	Х	Х
Search for new ways to advance the credibility and stature of the ALI, the ALI members, and the ladder industry as a whole	Х	Х	Х
Continue to list ALI members on all MTP modules	We will ma	ke semi-annua	l changes to
thereby providing value by identifying the		P modules, as	
companies responsible for the training. Modify	•	This will be con	•
these lists to keep current	ad hoc bas	sis outside of th	ne proposed
		2015 budget.	

#### Maintain ALI position in ANSI A14 standards development, publication and sales.

#### The following initiatives would be covered at the \$50,000 spend level:

- Maintain closer dialogue with key Board members and volunteers regarding the development and publication of standards
- Utilize online advertisements, media trade agreements, search engine optimization, search engine marketing (paid), and social media advertising to spread the word regarding the publication of ANSI A14 standards

## Maintain ALI's position as the foremost resource in the ladder industry for safety training and education.

#### The following initiatives would be covered at the \$50,000 spend level:

- Utilize multi-prong advertising approach (social, online, email) to engage a wider audience about ALI's brand and offerings
- Continue to increase the diversity and breadth of ALI's audience through Spanishlanguage advertising campaigns
- Work with Board members and volunteers to develop a Ladder Safety Toolbox Kit utilizing the public domain information provided by OSHA – that would be used in lead generation campaigns and to further solidify the organization's position as the foremost resource in the ladder industry for safety training and education

#### The following initiatives would be added at the \$75,000 spend level:

- Expand ALI's brand presence through onsite sponsorship at the AGC Expo
- Utilize the mobile app in advertisements and communications with existing database to increase the ease of sharing ALI content

#### The following initiatives would be added at the \$100,000 spend level:

 Integrate laddersafetytraining.org into the ALI website, which will help with SEO of the ALI site – thereby the visibility of the site – and increase the ability to track user behavior on the site

## Search for new ways to advance the credibility and stature of the ALI, the ALI members and the ladder industry as a whole

#### The following initiatives would be covered at the \$50,000 spend level:

• Utilize the community management position to spread the word regarding ladder safety and increase the brand presence of ALI, specifically

### IV. Overview of 2015 Strategic Marketing Initiatives and Investments

Marketing Initiative	\$50k Investment Level	\$75k Investment Level	\$100k Investment Level
	Investment	Investment	Investment
Marketing Plan	\$800	\$900	\$950
Management Meetings	\$5,000	\$5,000	\$5,000
Financial Management	\$1,000	\$1,000	\$1,000
Community Management	\$5,300	\$5,300	\$5,300
Social Media Advertising - English	\$4,200	\$4,400	\$4,500
Social Media Advertising - Spanish	\$4,200	\$4,300	\$4,400
Media Trade Opportunities	\$4,900	\$4,900	\$4,900
Media Guide	\$1,700	\$1,700	\$1,700
List Rental	\$2,600	\$2,600	\$2,600
E-Newsletter Advertising	\$6,400	\$6,400	\$6,400
Search Engine Optimization	\$1,500	\$1,500	\$1,500
Google Analytics	\$600	\$600	\$600
Website Content Audit	\$4,000	\$4,000	\$4,000
Website Content Refresh / News Feed	\$4,000	\$4,000	\$4,000
Ladder Safety Toolbox Kit	\$2,000	\$2,000	\$2,000
Quarterly Reporting	\$1,800	\$1,800	\$1,800
Year-Round Mobile App	-	\$19,000	\$19,000
Onsite Sponsorship	-	\$5,100	\$5,100
YouTube Refresh / Optimization	-	-	\$1,400
Integrating Laddersafetytraining.org into ALI Website	-	-	\$19,350
Web Advertising - English	-	-	\$4,700
Total	\$50,000	\$74,500	\$100,200
Staff Time, including design time	\$39,200	\$50,200	\$61,000
Out of Pocket Expenses	\$10,800	\$24,300	\$39,200



AMERICAN LADDER INSTITUTE 2015 SPRING MEETING LOEWS VENTANA CANYON RESORT TUCSON, ARIZONA STRATEGIC PLANNING SESSION MONDAY, MARCH 9, 2015 8:30 am to 9:30 am



Susan Lane, Executive Director Kat Seiffert, Marketing Manager Keith Liskey, Facilitator

### <u>AGENDA</u>

- I. Call to order
- II. Strategic Plan Review
- III. Adjournment



### AMERICAN LADDER INSTITUTE 2015 SPRING CONFERENCE STANDARDS COMMITTEE MONDAY, MARCH 9, 2015 8:30 am to 9:00 am LOEWS VENTANA CANYON TUSCSON, AZ



Tom Schmitt – Chair, Louisville Ladder Dave Plotner, Werner Co.

### AGENDA

- I. Call to order
- II. Review/Approval of Fall Conference meeting minutes
- III. YTD Standards sales report
- IV. A14 Committee activities update
  - a. Standards
  - b. Label Task Force

#### V. New business

 a. Next A14 Committee Meeting Wednesday, April 22, 2015 ALI Headquarters
 330 N Wabash Ave, Chicago, IL

VI. Adjournment

#### AMERICAN LADDER INSTITUTE STANDARDS COMMITTEE MISSION STATEMENT

The ALI Standards Committee is responsible to see that the one vote the ALI has on A14 standards is representative of the association's position on A14 issues, and to keep the ALI informed of communications and actions of various groups on standards related issues. These groups include the A14 committees, subcommittees, and various government agencies.



### AMERICAN LADDER INSTITUTE 2014 FALL MEETING STANDARDS COMMITTEE MONDAY, SEPTEMBER 22, 2014 10:15 am – 10:45 am THE HAY ADAMS HOTEL WASHINGTON, DC



Tom Schmitt – Chair, Louisville Ladder Dave Plotner, Werner Co.

#### **Minutes**

- I. Call to Order
  - Chairman Schmitt called the meeting to order
- II. Review/Approval of Spring Conference meeting minutes
  - Minutes from the Spring Conference meeting were approved
- III. Standards Sales Report
  - Lane provided 2014 year summary of standards sales by standard and vendors. 2014 YTD sales were also reported.
- IV. Standards Activities Update
  - Revisions to A14.1, A14.2 and A14.5 continue. The plan is to have them out in 2015
  - A14.3 is up for renewal in 2015.
  - A14.11 is nearing completion but a new issue was raised dealing with material types and testing that may need to be addressed in the standard.

### V. Label Task Force

• The task force continues to revamp the labels.

#### VI. New Business

• Next A14 Committee Meeting is scheduled for Wednesday, April 22, 2015, at ALI Headquarters in Chicago, 330 N Wabash Ave, Chicago, IL

#### VII. Adjournment

• Chairman Schmitt adjourned the meeting.

				STAND	<i>.</i>			'				
ANSI 2014		Janua	ry			Feb			March			April
	Quantity	Sales		Quantity		Sales	Quantity		Sales	Quantity		Sales
A14.1-160-4100	1		0.00		\$	-				2	\$	400.00
A14.2 - 160-4200	2		0.00		2 \$	400.00	2		400.00	3	\$	638.00
A14.3 - 160-4300	6		0.00		9 \$	1,923.20	8	} \$	1,600.00	4	\$	923.20
A14.4 - 160-4400			0.00		\$	-				2	\$	400.00
A14.5 - 160-4500	2	\$ 40	0.00		1 \$	200.00	3	} \$	600.00	3	\$	638.00
A14.7 - 160-4700	2	\$ 40	0.00		2 \$	400.00				2	\$	400.00
A14.8 - 160-4800					1 \$	200.00				1	\$	200.00
A14.9 - 160-4900					\$	-						
A14.11 - 160					\$	-						
Single Sales		\$ 2,80	0.00		\$	3,123.20		\$	2,600.00		\$	3,599.20
ANSI Package					\$	-		-				
Site License					\$	-					\$	3,080.00
ANSI Total/Payment		\$ 2,800	.00			3,123.20		\$	2,600.00		\$	6,679.20
Internal Sales		\$	-		\$	-		\$	-		\$	-
		May				June			July			August
ANSI 2014	Quantity	Sales		Quantity		Sales	Quantity		Sales	Quantity		Sales
A14.1-160-4100			0.00		1 \$	200.00		1 \$	200.00		\$	200.00
A14.2 - 160-4200	4	\$ 83	8.00		3 \$	838.00	5	5 \$	1,038.00	5	\$	1,000.00
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A14.4 - 160-4400		,==				.,		1 \$	200.00		•	-,
A14.5 - 160-4500	2		8.00		3\$	838.00		1 \$	238.00			600.00
A14.7 - 160-4700			0.00		1 \$	200.00	2	2 \$	400.00	2	\$	400.00
A14.8 - 160-4800	1	\$ 20	0.00									
A14.9 - 160-4900												
A14.11 - 160												
Single Sales		\$ 3,137	.60		\$	3,276.00		\$	3,799.20		\$	4,384.80
ANSI Package						-						
Site License								\$	1,660.00		\$	4,880.00
ANSI Total/Payment		\$ 3,137	.60		\$	3,276.00		\$	5,459.20		\$	9,264.80
Internal Sale		\$	-		\$	-		\$	-		\$	-
ANSI 2014		Sept				Oct			Nov			Dec
	Quantity	Sales		Quantity		Sales	Quantity		Sales	Quantity		Sales
A14.1 - 160-4100	Quarticity	Jaies		Quantity		Jales	Quantity		Jales	Quantity 1		\$200.0
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A14.7 - 160-4500			0.00		3 \$ 3 \$	600.00	3		\$600.00	4		\$200.00
A14.8 - 160-4100		φ 20	0.00		JΦ	000.00		,	\$200.00	4		\$000.00
A14.9 - 160-4800			_		_			1	\$200.00			
			_		_		_					
A14.11 - 160 ANSLASC Backson					_			-				
ANSI ASC Package		A 252	2 20		*	2,000,00			2 400 00		٠	2 400 00
Single Sales		\$ 3,52	3.20		\$	2,000.00		\$	3,400.00		\$	2,400.00
ANSI Package	_				_				0.100.00			
Site License	7	\$7,760.0				0.000.00		\$	2,100.00			AD 400 01
ANSI Total/Payment		\$ 11,283	6.20			2,000.00		1	5,500.00			\$2,400.00
Internal Sales		-			\$	_					\$	-

20	14 YTD STA	NDARDS	SALES- IH	IS & Tech S	Street	
S 2014	01		02	03		04

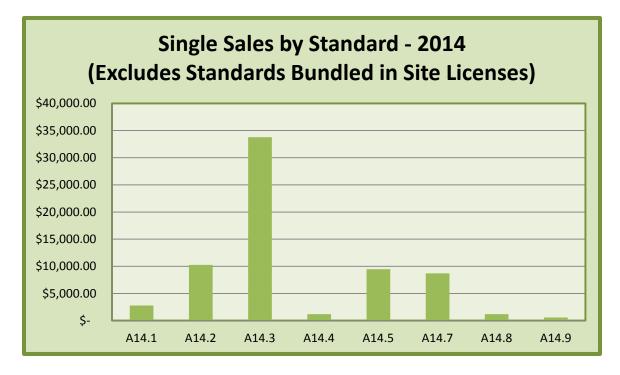
IHS 2014			Q1				Q2			Q3			Q4
	Quantity		Sales		Quantity		Sales	Quantity		Sales	Quantity		Sales
A14.1 - 160-4100					1	\$	187.50	3	\$	600.00	2	\$	400.00
A14.2 - 160-4200	4	\$	725.00		2	\$	375.00	5	\$	1,000.00	4	\$	800.00
A14.3 - 160-4300	13	\$	2,287.50		23	\$	3,920.00	23	\$	4,520.00	13	\$	2,600.00
A14.4 - 160-4400											1	\$	200.00
A14.5 - 160-4500	1	\$	187.50		3	\$	562.50	5	\$	1,000.00	2	\$	400.00
A14.7 - 160-4700	3	\$	562.50		6	\$	975.00	6	\$	1,200.00	3	\$	600.00
A14.8 - 160-4800													
A14.9 - 160-4900					1	\$	187.50						
A14.11 - 160													
Single Sales		\$	3,762.50			\$	6,207.50		\$	8,320.00		\$	5,000.00
Site License		\$	4,640.98			\$	579.07		\$	888.12		\$	11,060.31
IHS Total/Payment		\$	8,403.48			\$	6,786.57		\$	9,208.12		\$	16,646.46
TechStreet 2014			Q1				Q2			Q3			Q4
	Quantity		Sales		Quantity		Sales	Quantity		Sales	Quantity		Sales
A14.1 - 160-4100													
A14.1 - 160-4100 A14.2 - 160-4200	1	\$	168.75								1	\$	
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A14.2 - 160-4200 A14.3 - 160-4300	1			E	2	\$	375.00 375.00	1	· ·		1		1,125.00
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A14.2 - 160-4200 A14.3 - 160-4300 A14.4 - 160-4400 A14.5 - 160-4500 A14.7 - 160-4700 A14.8 - 160-4700 A14.8 - 160-4800	1			E	2	\$	375.00	1	\$	187.50 187.50 375.00	1	\$ \$	1,125.00
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A14.2 - 160-4200 A14.3 - 160-4300 A14.4 - 160-4400 A14.5 - 160-4500 A14.7 - 160-4700 A14.8 - 160-4700 A14.9 - 160-4900 A14.11 - 160	1	\$	1,838.05		2	\$	375.00 187.50	1	\$ \$ \$ \$	187.50 187.50 375.00 375.00	1	\$ \$	1,125.00 187.75 562.50
A14.2 - 160-4200 A14.3 - 160-4300 A14.4 - 160-4400 A14.5 - 160-4500 A14.7 - 160-4500 A14.8 - 160-4800 A14.9 - 160-4900 A14.11 - 160 Single Sales	1	\$			2	\$	375.00 187.50 <b>937.50</b>	1 1 2 2	\$ \$ \$ \$ \$	187.50 187.50 375.00 375.00 <b>1,687.50</b>	1	\$ \$	1,125.00 187.75 562.50 <b>2,119.00</b>
A14.2 - 160-4200 A14.3 - 160-4300 A14.4 - 160-4400 A14.5 - 160-4500 A14.7 - 160-4500 A14.8 - 160-4800 A14.9 - 160-4900 A14.11 - 160 Single Sales Site License	1	\$	1,838.05		2	\$	375.00 187.50	1	\$ \$ \$ \$ \$	187.50 187.50 375.00 375.00 <b>1,687.50</b>	1	\$ \$ \$	1,125.00 187.75 562.50 <b>2,119.00</b> 178.75
A14.2 - 160-4200 A14.3 - 160-4300 A14.4 - 160-4400 A14.5 - 160-4500 A14.7 - 160-4500 A14.8 - 160-4800 A14.9 - 160-4900 A14.11 - 160 Single Sales	177	\$	1,838.05		2	\$ \$ \$	375.00 187.50 <b>937.50</b>	1 1 2 2	\$ \$ \$ \$ \$ \$	187.50 187.50 375.00 375.00 <b>1,687.50</b>	1	\$ \$ \$ \$ \$	1,125.00 187.75 562.50 <b>2,119.00</b>

## 2014 YTD Standards Sales Summary

ANSI Single Sales	\$ 38,043.20					
ANSI Site License	\$ 19,480.00			Stan	idard Total	
Total ANSI Sales		\$	57,523.20	A14.1	1	4
IHS Single Sales	\$ 23,290.00			A14.2	2 5	0
IHS Site License	\$ 17,168.54			A14.3	3 16:	9
Total IHS Sales		\$	40,458.54	A14.4	, I	6
Techstreet Single Sales	\$ 6,750.80			A14.5	5 41	6
Techstreet Site License	\$ 2,017.60			A14.7	' 4!	5
Total Techstreet Sales		\$	8,768.40	A14.8	}	6
Internal Sales				A14.9	) :	3
Total Single Sales	\$ 68,084.00				Total 339	3
Total Site License	\$ 38,916.14					
Total YTD		\$1	06,750.14			
			-			

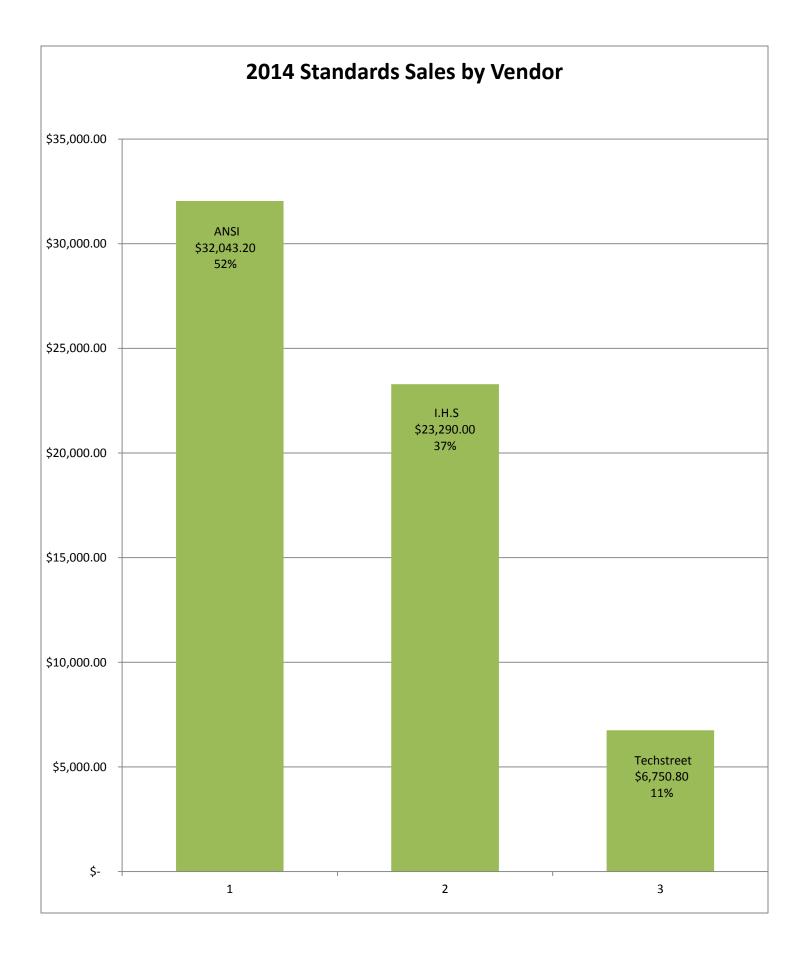
## **Standards Sales Summary**





- A14.1 Portable Wood Ladders
- A14.2 Portable Metal Ladders
- A14.3 Fixed Ladders
- A14.4 Job Made Ladders
- A14.5 Reinforced Plastic Ladders

- A14.7 Rolling Ladders
- A14.8 Requirements for Ladder Accessories
- A14.9 Disappearing Attic Stairways





AMERICAN LADDER INSTITUTE 2015 SPRING CONFERENCE OUTREACH / PUBLIC RELATIONS COMMITTEE MONDAY, MARCH 9, 2015 9:00 am – 10:00 am LOEWS VENTANA CANYON TUCSON, AZ



Keith Liskey – Chair, Strongwell Corporation Ron Schwartz, Tri-Arc Manufacturing Rob Touzalin, American Roll Formed Products Manny DeSantis, Valley Fastener Group

#### AGENDA

- I. Call to order
- II. Review / Approval of Fall Conference meeting minutes
- III. Projects
  - a. Laddersafetytraining.org
    - i. YTD activity
    - ii. DVD sales
    - iii. Module Review/Identification of New Modules
    - iv. Website management
  - b. 2015 Marketing Activities
    - i. Current activities
  - c. 2015 Marketing plans
- IV. New business
- V. Adjournment

#### AMERICAN LADDER INSTITUTE OUTREACH / PUBLIC RELATIONS COMMITTEE MISSION STATEMENT

- To research and determine public relations opportunities for ALI to feature training resources
- Decisions based on best use of financial resources



### AMERICAN LADDER INSTITUTE 2014 FALL MEETING OUTREACH / PUBLIC RELATIONS COMMITTEE MONDAY, SEPTEMBER 22, 2015 10:45 am – 11:15 am THE HAY ADAMS HOTEL WASHINGTON, DC



Keith Liskey – Chair, Strongwell CorporationRob Touzalin, American Roll Formed ProductsRon Schwartz, Tri-Arc ManufacturingRob Touzalin, American Roll Formed Products

#### **Minutes**

- I. Call to Order
- Chair Liskey called the meeting to order

#### II. Review / Approval of Spring Conference Meeting Minutes

• Minutes from the Spring Conference were reviewed and approved

#### III. Projects

Laddersafetytraining.org Activity:

- Lane provided a detailed report on YTD, 2014 and historical participation in LST.org training.
- Lane reviewed the new label design for the DVD.
- Lane reported on the launch and new features of ALI's new website and consolidation of ALI.org and LS.org.
- The new module titled Lifting and Handling was deferred to be discussed at another time.

#### 2014 Marketing Activities:

- Lane reviewed the highlights of the new ALI web site platform.
- Lane reviewed the current activities of the marketing activities.

2015 Marketing Plans:

• Based on the board conversation, Lane to work with the Marketing team to develop a detailed budget and present a detailed plan back to the board for their approval.

#### IV. New Business

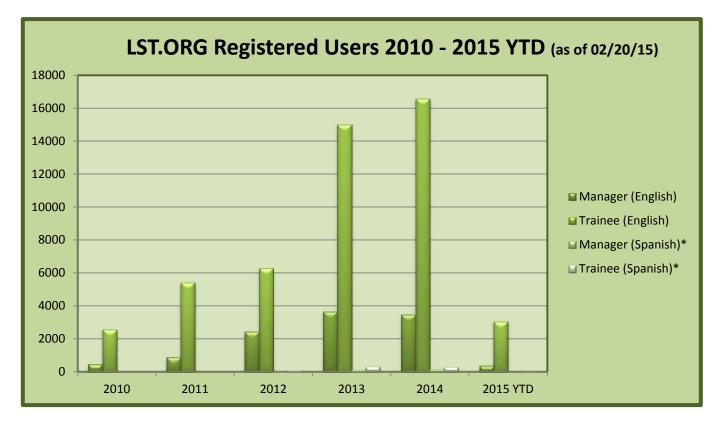
• There was no new business presented.

#### V. Adjournment

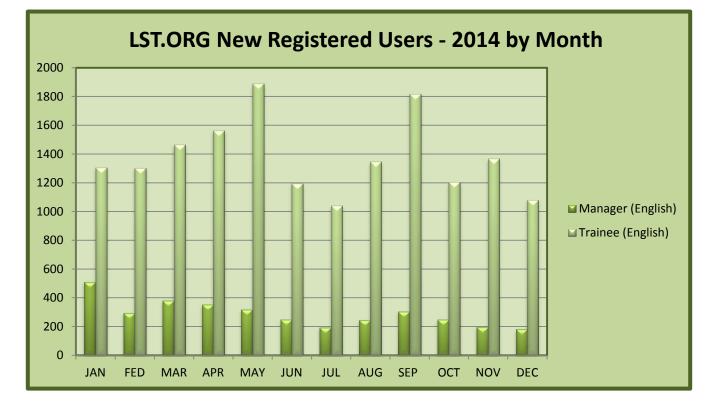
Chair Liskey adjourned the meeting.

2014 Fall Conference Outreach/PR meeting minutes

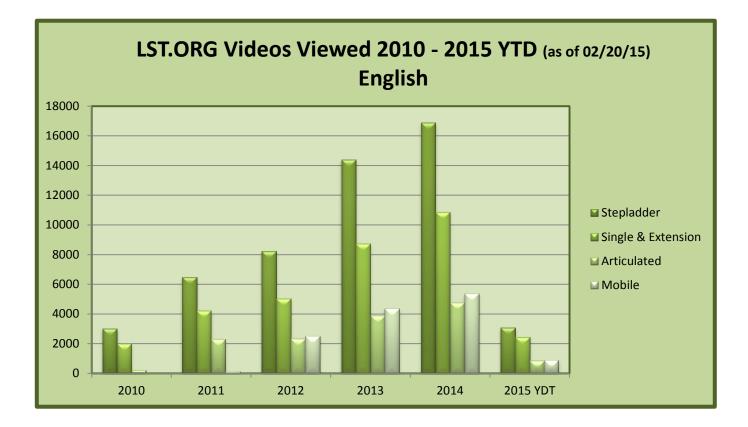
## LADDERSAFETYTRAINING.ORG ACTIVITY SUMMARY 2010 – 2015 YTD

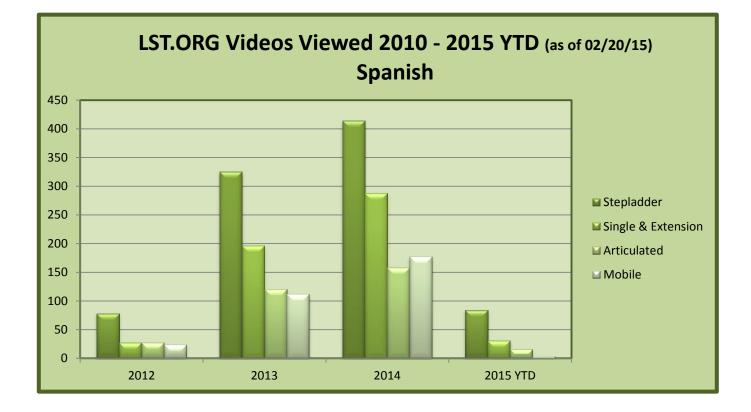


- \* 2012 20 Manager Spanish & 85 Trainee Spanish
- \* 2013 104 Manager Spanish & 299 Trainee Spanish
- \* 2014 144 Manager Spanish & 275 Trainee Spanish

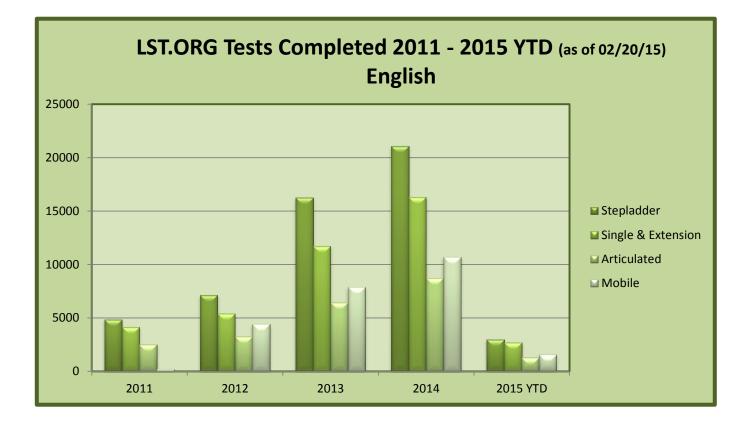


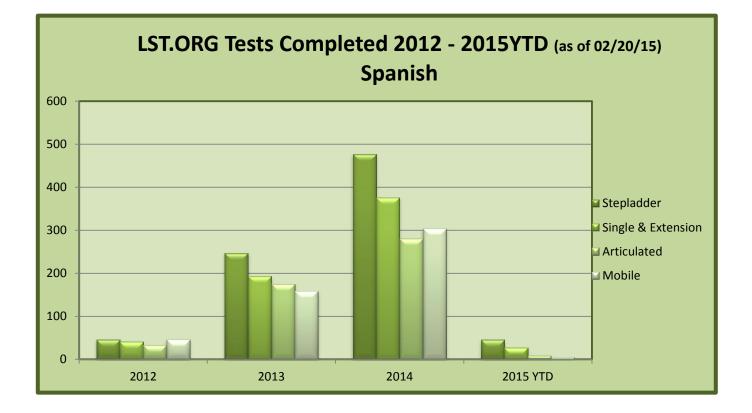
## LADDERSAFETYTRAINING.ORG ACTIVITY SUMMARY 2010 – 2014 YTD





## LADDERSAFETYTRAINING.ORG ACTIVITY SUMMARY 2010 – 2015 YTD

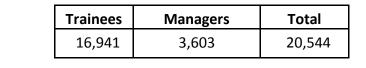




## Laddersafetytraining.org Activity Summary 2014 Snapshot

#### **New Registered Users**

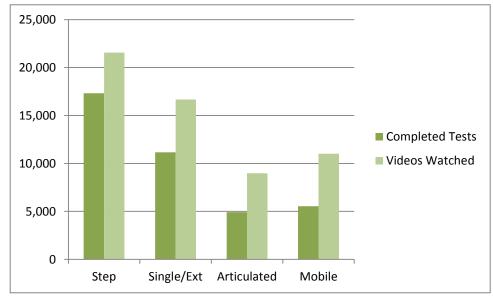
#### 2014 Totals





### Videos Watched & Completed Tests

2014	Step	Single/Ext	Articulated	Mobile		
<b>Completed Tests</b>	17,319	11,157	4,933	5,540		
Videos Watched	21,561	16,671	8,983	11,010		
Average Test Score	Post: 88.86					
Rating (1-5)	Average = 4.70					





# 2015 Strategic Marketing Plan

**Calendarization of Marketing Tactics** 

**Overall Marketing Goal:** Directly Support ALI's Key Strategic Initiatives from the 2015 Strategic Plan

- I. 2015 Education/Promotion of Safety
- II. 2015 Public Relations Initiatives
- III. Organizational Sustainability
- IV. Overview of 2015 Strategic Marketing Initiatives and Investments

## **Overview of Approved Budget**

Marketing Initiative	\$50k Investment Level	\$75k Investment Level	\$100k Investment Level
	Investment	Investment	Investment
Marketing Plan	\$800	\$900	\$950
Management Meetings	\$5,000	\$5,000	\$5,000
Financial Management	\$1,000	\$1,000	\$1,000
Community Management	\$5,300	\$5,300	\$5,300
Social Media Advertising - English	\$4,200	\$4,400	\$4,500
Social Media Advertising - Spanish	\$4,200	\$4,300	\$4,400
Media Trade Opportunities	\$4,900	\$4,900	\$4,900
Media Guide	\$1,700	\$1,700	\$1,700
List Rental	\$2 <i>,</i> 600	\$2,600	\$2,600
E-Newsletter Advertising	\$6 <i>,</i> 400	\$6,400	\$6,400
Search Engine Optimization	\$1,500	\$1,500	\$1,500
Google Analytics	\$600	\$600	\$600
Website Content Audit	\$4,000	\$4,000	\$4,000
Website Content Refresh / News Feed	\$4,000	\$4,000	\$4,000
Ladder Safety Toolbox Kit	\$2,000	\$2,000	\$2,000
Quarterly Reporting	\$1,800	\$1,800	\$1,800
Year-Round Mobile App	-	\$19,000	\$19,000
Onsite Sponsorship	-	\$5,100	\$5,100
YouTube Refresh / Optimization	-	-	\$1,400
Integrating Laddersafetytraining.org into ALI Website	-	-	\$19,350
Web Advertising - English	-	-	\$4,700
Total	\$50,000	\$74,500	\$100,200
Staff Time, including design time	\$39,200	\$50,200	\$61,000
Out of Pocket Expenses	\$10,800	\$24,300	\$39,200

# **Implementation of Marketing Plan**

Marketing Initiative	Q1	Q2	Q3	Q4
Marketing Plan	Х			
Management Meetings	Х	Х	Х	Х
Financial Management	Х	Х	Х	Х
Community Management	X*	Х	Х	Х
Social Media Advertising - English	X*	Х	Х	Х
Social Media Advertising - Spanish		Х	Х	Х
Media Trade Opportunities	Х	Х	Х	Х
Media Guide		Х		
List Rental			Х	
E-Newsletter Advertising	Х	Х	Х	Х
Search Engine Optimization			Х	Х
Google Analytics	Х	Х	Х	Х
Website Content Audit		Х	Х	
Website Content Refresh / News Feed		Х	Х	
Ladder Safety Toolbox Kit		Х		
Quarterly Reporting	Х	Х	Х	Х

# Improving Effectiveness of Social Media Spend and Support

- Developing a social media plan so that the digital ad spend and activity on social media channels more accurately reflect the market needs and opportunities
- Based on qualitative and quantitative inputs:
  - Qualitative: We are actively leveraging the knowledge and experience of a marketing colleague experiencing success in the marketing of standards
  - **Quantitative:** Compiling and comparing the following data points:
    - Metrics from previous Google AdWords campaigns
    - Current usage of members and associate members across channels (e.g., Twitter, LinkedIn, Facebook, YouTube)
    - Current usage of companies that have purchased ALI's safety training DVDs across channels
    - Current usage of associations focused on the congruent industries
    - Secondary research relative to Spanish-speaking targets

Note: This activity is a partial investment by the marketing department to ensure better results for ALI.

# Improving Effectiveness of Social Media Spend and Support (continued)

- Considerations:
  - Start a LinkedIn company page to target advertising to training professionals and business owners
  - Start a Twitter account for ALI to disseminate relevant news
  - Sunset or reconfigure plan for YouTube to better direct interested users to laddersafetytraining.org site
- The social media plan (inclusive on organic and paid) will be complete by mid-March with rollout of the plan starting at that time

Note: This activity is a partial investment by the marketing department to ensure better results for ALI.

Community Management | Social Media Advertising | Paid Search Advertising | Website Updates | Management Meetings | Financial Management | Google Analytics | Quarterly Reporting

# Q1 2015 Marketing Tactics

## Marketing Plan

Develop marketing plan for approval and calendarize once approved

- Website
  - ✓ Discuss opportunities with IT for improving the user experience

## • Outbound Marketing

- Secure a tile advertisement in AGC "Safety Matters" newsletter for 12 months to widen the awareness of ALI products
- Paid search advertising: Utilize Google AdWords campaigns to direct more traffic to the website to target company owners

## • Social Media

- Conduct research to build the social media plan
- Execute social media plan relative to community management and social media advertising
  - Social media advertisements in English to target end users and consumers
    - Platform(s) will be based on social media research and plan

Community Management | Social Media Advertising | Paid Search Advertising | Website Updates | Management Meetings | Financial Management | Google Analytics | Quarterly Reporting

# Q2 2015 Marketing Tactics

## • Content Development

- Create a media guide to accompany all distributions of the Ladder Safety Training videos and connections to website
- Work with Board of Directors to craft a press release regarding the high ranking of ladders on the OSHA top ten citations list (movement from #7 to #3)
  - Disseminate through multiple channels

## • Website

- Build out page on website as a resource center for sharing, including the media guide, as well as social media community sharing best practices (i.e., "spread the word" Web page)
- Create a landing page on the ALI website regarding the top ten citations list and use that landing page in digital marketing initiatives
- Content audit of top 40 pages of website to ensure that the content on the website it up to date, is written from the perspective of benefits to the user and is consistent in tone and voice for the ALI brand
  - This will continue through Q3
- Develop a plan and budget for website improvements\*

Community Management | Social Media Advertising | Paid Search Advertising | Website Updates | Management Meetings | Financial Management | Google Analytics | Quarterly Reporting

# Q2 2015 Marketing Tactics

(continued)

## • Outbound Marketing

- Engage AGC and the National Safety Council regarding media trade opportunities
- Change tile advertisement design for the AGC "Safety Matters" newsletter
- Paid search advertising: Utilize Google AdWords campaigns to direct more traffic to the website to target company owners

## Social Media

- Social media advertisements in English and Spanish to target end users and consumers
  - Platform will be based on social media research and plan
  - Identify translator for Spanish-language social media advertisements
- Focus areas for organic and paid social media:
  - Disseminate top 10 typical causes of ladder accidents with a special emphasis on roofing contractors
  - Spread the word of the high ranking of ladders on the OSHA top ten citations list

Community Management | Social Media Advertising | Paid Search Advertising | Website Updates | Management Meetings | Financial Management | Google Analytics | Quarterly Reporting

# Q3 2015 Marketing Tactics

## • Content Development

- Work with Board members and volunteers to develop a Ladder Safety Toolbox Kit
  - Utilizing the public domain information provided by OSHA as a content-based incentive to navigate to the ALI site

## Website

- Formalize plan for website improvements for Board consideration
- Identification and incorporation of news outlets and custom searches for home page news feed
- Organic search optimization: Optimize website for search engines to increase in ranking for key search terms
- Continuation of content audit of top 40 pages of website
- Outbound Marketing
  - Purchase a one-time 10,000 record list rental from Safety + Health Magazine from the National Safety Council

Community Management | Social Media Advertising | Paid Search Advertising | Website Updates | Management Meetings | Financial Management | Google Analytics | Quarterly Reporting

# Q3 2015 Marketing Tactics

(continued)

## Outbound Marketing

- Explore media trade opportunities with the SmithBucklin Complementary Organizations\* and negotiate agreements that are mutually beneficial
- Change tile advertisement design for the AGC "Safety Matters" newsletter

## Social Media

- Focus area of social media:
  - Publication of ANSI A14 standards

Community Management | Social Media Advertising | Paid Search Advertising | Website Updates | Management Meetings | Financial Management | Google Analytics | Quarterly Reporting

# Q4 2015 Marketing Tactics

## • Outbound Marketing

- Engage other safety organizations (Scaffolding, Window Cleaners, VPPA, Home Builders) regarding media trade opportunities
- Change tile advertisement design for the AGC "Safety Matters" newsletter

## • Website

- Optimize 15 high-value Web pages with SEO to make the site easier to find for potential users searching for key terms that have been pre-identified as important
- Create a new Web page on the ALI site directed at DIY ladder users as a landing page for social media pushes
- Begin to implement plan for website improvements (if approved)

## • Social Media

- Focus areas of social media:
  - Ladder safety relative to DIY ladder users



**Recommendations for the Future** 

## FOLLOW UP FROM BOARD MEETING

# **Mobile App Recommendation**

Do not pursue a mobile app at this time. Focus on making ALI's sites responsive and user-friendly.

## **Reasons for Recommendation:**

- A native mobile app that has videos directly accessible on the app (i.e., would not necessitate a data connection to stream the video) could run up to \$100,000 as custom builds would be necessary
  - Also, if the videos are embedded, the app would be extraordinarily large from a download perspective, which would dissuade users from downloading the app or cause them to quickly remove the app after downloading it for space reasons
- A mobile app that streamed the video from an external source (e.g., YouTube) would still have the issue of the user needing data connectivity
- Given that the Ladder Safety Training website is responsive and toggles between Spanish and English, it would not cost-effective or provide an enhanced user experience to build a mobile app rather than rely on the existing responsive site.

## **On the Road to Recommendations:** Interim Solution to Increase Visibility of ALI Website

Create a vanity URL on the ALI site to use in outbound marketing that redirects to the Ladder Safety Training site

- Use the vanity URL on social media and outbound marketing to increase the visibility of the AmericanLadderInstitute.org site without integrating the two sites
- Marketing implications: This would not increase traffic to the ALI site or impact the bounce rate relative to Google Analytics. This would primarily be a marketing tool to increase visibility of the ALI website even if the user is pushed directly to the Ladder Safety Training site.
- **Budget implications:** None. This would be part of the IT support package.
- **Timing:** Could be completed immediately.

## On the Road to Recommendations: Making the ALI Website Responsive

Given that visitors to the ALI website are increasingly on mobile devices\*, the website should be updated to fit their needs and the current Web expectations.

- Marketing implications: By having both sites be responsive, the need for a mobile app to disseminate information about ALI or the training videos is diminished – at a fraction of the cost. Additionally, Google gives preferential treatment to responsive sites in search results, thereby increasing the search ranking.\*\*
- **Budget implications:** It will cost \$3k-\$5k to switch over to the appropriate Y-M theme. IT costs would be part of the current maintenance fee.
  - If desired to redesign the look and feel, it would be up to \$4k in Creative costs, but this could be more limited based on the desired design direction.
- **Timing:** Y-M is in the middle of releasing the new theme design. The IT team is keeping us abreast of any developments in their schedule. It will release in 2015, just a matter of when.

\* See Appendix \* <u>Source 1</u>; <u>Source 2</u>

## On the Road to Recommendations: Potential Website Transition

Transition the Ladder Safety Training website to a more stable platform that has room to grow.

- Current issues with website:
  - Is not a CMS; each change needs to be hard-coded, thereby increasing the IT time (and costs)
    - Adding a new video, for instance, would be a fairly significant endeavor
  - Issues with certification and scoring that cannot be resolved
  - Trainee/Trainor profiles update issues that cannot be resolved
- We are working with IT to determine possible platform solutions and their associated budget implications. We anticipate proposing the to-be-developed website transition plan at the fall meeting.



## **APPENDIX**

# **Mobile Usage of ALI Sites**

- Increases of mobile usage on ALI sites:\*
  - 4.4% increase of mobile usage on the laddersafetytraining.org site
  - 612.70% increase of mobile usage for the americanladderinstitute.org site
- On the americanladderinstitute.org site, mobile accounts for 12.02% of the traffic now whereas it accounted for only 3.45% a year ago

# **Snapshot of ALI Website Usage**

			Acquisition			Behavior		
	D	Nevice Category	Sessions 🔹 🔶	% New Sessions	New Users	Bounce Rate	Pages / Session	Avg. Session Duration
			206.57% • 2,845 vs 928	2.50% • 83.73% vs 81.68%	214.25% • 2.382 vs 758	5.89% • 62.78% vs 66.70%	3.75% + 2.14 vs 2.06	5.86% •
8	1.	desktop						
		Dec 19, 2014 - Jan 18, 2015	2,396 (84.22%)	84.10%	2,015 (84.59%)	60.31%	2.25	00:01:58
		Dec 19, 2013 - Jan 18, 2014	865 (93.21%)	81.62%	706 (93.14%)	65.90%	2.11	00:01:43
		% Change	176.99%	3.04%	185.41%	-8.48%	6.35%	14.44%
0	2	mobile						
		Dec 19, 2014 - Jan 18, 2015	342 (12.02%)	81.29%	278 (11.67%)	76.90%	1.59	00:00:44
		Dec 19, 2013 - Jan 18, 2014	<b>32</b> (3.45%)	90.62%	29 (3.83%)	84.38%	1.28	00:00:50
		% Change	968.75%	-10.30%	858.62%	-8.86%	24.15%	-12.47%
8	3.	tablet						
		Dec 19, 2014 - Jan 18, 2015	<b>107</b> (3.76%)	83.18%	89 (3.74%)	72.90%	1.51	00:00:43
		Dec 19, 2013 - Jan 18, 2014	31 (3.34%)	74.19%	23 (3.03%)	70.97%	1.48	00:01:16
		% Change	245.16%	12.11%	286.96%	2.72%	2.03%	-43.04%

# List of "SmithBucklin Complementary Organizations"

- National Association of Independent Fee Appraisers (NAIFA)
- National Lumber and Building Material Dealers Association (NLBMDA)
- North American Building Material Distribution Association, the North American Wholesale Lumber Association (NAWLA)
- Restoration Industry Association (RIA)



### AMERICAN LADDER INSTITUTE 2015 SPRING MEETING MATERIAL SUPPLY COMMITTEE MONDAY, MARCH 9 2015 10:15 am to 11:00 am LOEWS VENTANA CAYNON TUSCON, AZ



Keith Liskey – Chair, Strongwell Corporation

#### **AGENDA**

- I. Call to order
- II. Review/Approval of Fall Conference meeting minutes
- III. Material Supply Report
  - a. Steel Plain & Coated
  - b. Aluminum
  - c. Fiberglass
  - d. Plastic
  - e. Wood Southern Yellow Pine, Fir/Hemlock, Western Woods & Rung
  - f. Finishes Paint, Powder Coating & Plating
  - g. Freight
- IV. New business
- V. Adjournment

#### AMERICAN LADDER INSTITUTE MATERIAL SUPPLY COMMITTEE MISSION STATEMENT

The Material Supply Committee is responsible for tracking and communicating current activity and trends for the materials involved in ladder production. Valuable information is shared among the members regarding availability and cost of materials, as well as current transportation trends.



### AMERICAN LADDER INSTITUTE 2014 FALL MEETING MATERIAL SUPPLY COMMITTEE MONDAY, SEPTEMBER 22, 2014 11:15 am to 11:45 am THE HAY ADAMS HOTEL WASHINGTON, DC



Keith Liskey – Chair, Strongwell Corporation

#### <u>Minutes</u>

- I. Call to Order
  - Chair Liskey called the meeting to order
- II. Review/Approval of Spring Conference Meeting Minutes
  - Minutes from the Spring Conference were reviewed and approved
- III. Material Supply Reports

#### Steel:

• No changes. Materials continue to be hard to find.

Aluminum:

• Prices are up slightly.

Fiberglass:

• No issues with supply. 8% increase in price.

Plastic:

• No changes.

Wood:

• Nothing significant to report

Finishes:

Nothing significant to report

Freight:

 Issues with import negotiations. Shortage of drivers. Diesel prices are up to \$3.90 per gallon. Max out of freights and capacity is tight.

#### IV. Adjournment

• Chair Liskey adjourned the meeting



### AMERICAN LADDER INSTITUTE 2015 SPRING CONFERENCE CONFERENCE COMMITTEE TUESDAY, MARCH 10, 2015 7:30 am to 8:00 am LOEWS VENTANA CANYON TUCSON, AZ



Jerry Trolz – Chair, Goshen Stamping Company Keith Liskey, Strongwell Corporation Marc McConnell, Bauer Corporation

#### <u>AGENDA</u>

- I. Call to order
- II. Review / Approval of Fall Conference meeting minutes
- III. 2015 Fall Conference
  - a. Location review
  - b. Meeting format, content, etc.
  - c. Registration Fee Review
- IV. Future Conferences
  - a. 2016 Spring Conference
    - i. Location
    - ii. Meeting format, content, etc.
    - iii. Discuss potential speakers / topics
  - b. 2016 Fall Conference
    - i. Determine preferred locations for research
- V. New business
- VI. Adjournment

#### AMERICAN LADDER INSTITUTE CONFERENCE COMMITTEE MISSION STATEMENT

The ALI Conference Committee is responsible for assisting staff in planning for the semi-annual conferences. This committee will review the following areas:

- Conference site recommendation
- Possible conference speakers
- Opportunities for networking



AMERICAN LADDER INSTITUTE 2014 FALL CONFERENCE CONFERENCE COMMITTEE MONDAY, SEPTEMBER 22, 2014 11:45 am – 12:15 pm THE HAY ADAMS HOTEL WASHINGTON, DC



Jerry Trolz – Chair, Goshen Stamping Company Keith Liskey, Strongwell Corporation Marc McConnell, Bauer Corporation

#### **Minutes**

#### I. Call to Order

- Chair Trolz called the meeting to order
- II. Review / Approval of Spring Conference Meeting Minutes
- Minutes from the Spring Conference Meeting were reviewed and approved

#### III. 2014 Fall Conference

- Location review They Hay Adams All comments very positive
- Meeting Format, Content The committee requested that table and chairs be added to the Welcome Reception and to include appetizers and dinner (no dessert).

#### IV. Future Conferences

2015 Spring Conference

- Dates March 8-10, 2015
- Location The Loews Ventana Canyon, Tucson, Arizona.

#### 2015 Fall Conference:

- Possible locations for the 2015 Fall Conference at Ashville, NC.
- Need to look at dates in September and be mindful of the dates for Rosh Hashanah and Yom Kippur.
- Staff will be sending out RFP's to properties in those locations accordingly

#### V. Adjournment

• Chair Trolz adjourned the meeting.

	2009	2010	2011	2012	2013	2014	2015	
INCOME	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	PROPOSED	COMMENTS
REGISTRATION	10,300	10,600	11,900	11,900	13,950	13,750	15,000	Based on history
SPONSORSHIPS	2,875	900	2,800	2,400	2,250	2,700	2,700	Assumes all six Associate Members will sponsor
HOTEL COMMISSION	1,097	1,709	977	845	974	968	1,000	Based on history (2011-2014)
TOTAL INCOME	14,272	13,209	15,677	15,145	17,174	17,418	18,700	
	2009	2010	2011	2012	2013	2014		
EXPENSES	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL		COMMENTS
AUDIO VISUAL	948	512	733	270	707	603		
ASSOCIATES EVENT	1,780	1,825	2,165	2,261	2,164	2,481	2,700	
								Cost includes two breakfast, one break and board
BREAKFASTS	1,339	1,806	1,618	2,608	2,418	1,756	3,035	meeting cost
COFFEE BREAKS	376	0	0	0	0	0	250	
GRATUITIES	100	100		0	0	0	0	
WELCOME RECEPTION	3,270	2,989	2,818	3,219	4,497	3,192		Cost includes open bar, food station and appetizers
SHIPPING	0	0	65	0	33	0		No change
SIGNS	73	0	0	0	0	0	0	No signage needs are required
SPEAKER	0	300	300	0	0	0	0	
STAFF	3,359	3,804	4,125	4,125	4,250	3,300	4,500	Assumes an approximate 3% increase
								Assumes cost for two staff members to attend the
								conference. \$500 for airfare, \$1,000 for hotel and \$500
TRAVEL - STAFF	1,943	2,160	,	1,244	1,951	2,075	2,500	in misc. travel expense.
TOTAL EXPENSE	13,188	13,496	13,274	13,727	16,019	13,407	17,651	
PROFIT/(LOSS)	1,084	-287	2,402	1,418	255	4,011	1,049	

#### ALI 2015 Fall Meeting -

Submitted Proposals

RFP Code: G9NGVJ724ML ALI 2015 Foll Meeting Event Dates: 20-Sep-2015 to 21-Sep-2015 Prepared By: Susan Gilbert

Supplier Information					
Name:	Grand Bohemian Hotel Asheville, Autograph Collection	Inn On Biltmore Estate	Renaissance Asheville Hotel	The Omni Grove Park Inn	Hilton Asheville Biltmore Park
Website:	View Website	View Website	View Website	View Website	View Website
Address:	11 Boston Way Asheville, North Carolina, 28803 USA	1 Antier Hill Road Asheville, North Carolina, 28803-8692 USA	31 Woodfin Street Asheville, North Carolina, 28801 USA	290 Macon Avenue Asheville, North Carolina, 28804 USA	290 Macon Avenue Asheville, North Carolina, 28804 USA
General Information Proposal Introduction:	Thank you for the opportunity to host your group at the Grand Bohemian Hotel Ashevillel Our AAA Four Diamond Property was fashioned after a 17th Century European Hunting Lodge. We are conveniently located in the heart of historic Bitmore Village, within walking distance to restaurants, art alleries, and shopping! We have an award winning on site restaurant, the Red Stag Grill, our Grand Bohemian Galleyr. Poseidon Span de exceptional event space! Please let me know how I may be of assistance in booking this program! Thank you again for your consideration and I look forward to speaking with you soon!	We would love to host this group at the Inn on Biltmore Estate which is a 210 room hotel situated on the 8000 arce, private, gated Biltmore Estate. Conde' Nast has rated this hotel #15 out of the top 75 hotels in the United States.	The Renaissance Asheville Hotel offers the perfect location. The Renaissance is a full service hotel, a fo' indoor pool, whiripool, fitness center, in house restaurant. Walk to over 70 restaurants, shopping, theater, galleries, and a wide variety of nightlife. Marriott Reward Points for all member hotel guests. The ability to walk to over 70 restaurants will be a great benefit to this conference.	You made an excellent choice in considering The Omni Grove Park Inn for this very important event. Located on Sunset Mountain, The Omni Grove Park Inn's unique and iconic location has been around for 100 years and has been the location for some of the nation's greatest minds. Situated just 2 miles north of downtown Ashevellie, our location provides a think outside the box mentality allowing us to incorporate Asheville's natural beauty and local flair into every minute of your events! At The Omni Grove Park Inn we understand you NEED to see a return on their investment. You are investing in your company's future; therefore, it is our responsibility to host a program that your attendees will be talking about for months after threy depart. This leads to instant positive production – leading to an immediate return on your investment! You can count on The Grove Park Inn to make memories that last a lifetime! I look forward to hearing from you soon!	15-theater Cinema with stadium seating.
Proposed Dates:	20-Sep-2015 - 21-Sep-2015	17-Sep-2015 - 22-Sep-2015	20-Sep-2015 - 21-Sep-2015	20-Sep-2015 - 21-Sep-2015	17-Sep-2015 - 22-Sep-2015
Offered Concessions/Contractual Requirements:		Free self park for provident of the set of t	20% attrition Complimentary self parking Complimentary standard writeless internet in sleeping room Complimentary Meeting Room Rental with F&B minimum 1 per 50	Billing & Contractual Requirements: *A 25% Deposit on total Room Revenue (not including Resort Charge) and Banquet Food & Beverage minimum would be due with signed contract. *10% allowable attrition.	
Sleeping Rooms	will be honored at the group rate. More rooms over the	Rates are based on single/double occupancy. Please note that our rates are extremely value added as we have NO resort fee, NO charge for self parking. NO charge for bottled water in the rooms, No charge for transportation/shuttle around the 8000 acre estate. I will attach other amenities	Guestrooms include refrigerators, coffee & tea service, Aveda bath products; a standard at Renaissance Hotels. Offering complimentary standard wireless internet in guestrooms. Complimentary Self Parking.	Available Upgrades: Mountain View Rooms 5329 Premium Mountain View Rooms 5359 Executive King Suite 5599 Private Club Floor 5649 Run of House: An undetermined mixture of room types either located in the historic Main Inn or Sammons wing overlooking our yos gardens, Main Inn courtyard, native resort landscape or the beautiful Blue Ridge Mountain Range. Bed types include Double/Double, Queen/Queen, Queen or King Beds and will be assigned based on availability at the time of check-in. Room requests are welcome, but not guaranteed. Approximate room size range from 200- 350 sq. ft. Parking Info: Self and Garage Parking = \$15 per day   Valet Parking = \$22 per day	<ul> <li>165 well-appointed guest rooms with views of French Broad River and surrounding mountains</li> <li>5 two-room deluxe suites</li> <li>7 executive king suites</li> <li>3 two-room deluxe suite with the Infinity Tub Jacuzzi</li> <li>Balcony rooms available &amp; Mountain View rooms available</li> <li>Complimentary wireless high speed internet</li> <li>Large executive desk with built in refrigerators</li> <li>Hilton Serenity Bed Collection.</li> <li>Serenity Bath amenities featuring Crabtree and Evelyn's la Source products.</li> <li>In-room coffee makers featuring Lavazza coffee</li> <li>In-norom coffee makers featuring Lavazza coffee</li> <li>Ion and inoing board, hairdryer</li> <li>AM/FM radio with Mp3 player capability</li> <li>In-room safes</li> <li>Individual climate control</li> <li>Accessible rooms available</li> </ul>

#### ALI 2015 Fall Meeting -

Submitted Proposals RFP Code: G9NGVJY24ML ALJ 2015 Fall Meeting Event Dates: 20-Sep-2015 to 21-Sep-2015 Prepared By: Susan Gilbert

Supplier Information					
Name:	Grand Bohemian Hotel Asheville, Autograph Collection	Inn On Biltmore Estate	Renaissance Asheville Hotel	The Omni Grove Park Inn	Hilton Asheville Biltmore Park
Any (Run of House)	USD \$219.00- Only 3 and 10 rooms requested on the weekend before will be honored at the group rate. More rooms over the weekend will provide a 15% discount off the best available rate at the time of booking (Right now the online rates for that weekend are \$359 for non-refundable or or \$399.00 for regular rate. So 15% off would be either \$305 and \$339. Because of the popularity of weekends there, we are unable to increase our block on the weekend at the \$219.00 rate.	USD \$289.00	USD \$170.00	USD \$299.00	USD \$169
Resort Fee	N/A	No resort fees	N/A	USD \$10.00 Per Day (+Tax) Resort Charges are subect to 4% Local Occupancy Tax and 7% State Sales Tax (Subject to Change)	N/A
Estimated Costs:				7% state sales Tax (subject to change)	
Meeting Rooms					
Meeting Rooms - Total	USD \$2,400 Including Tax and Service	USD \$650 Including Tax and Service	Complimentary	USD \$500.00 Per Day (Inclusive) Complimentary Meeting and Event space based on group meeting a Banquet Food & Beverage minimum (excluding tax and service charge).	USD \$704 Including Tax and Service
Food and Beverage			Based on 20 Members attending		
Total F&B Minimum:	USD \$3,500.00	USD \$5,000.00	USD \$5,000.00	USD \$2,800.00	USD \$1,900.00
Estimated Caster	USD \$3,800	USD \$5,140	USD \$3,340	USD \$4,860	Do not have the menu
Estimated Costs: A/V and Internet Costs	Total- USD\$5,000 Including Tax and Services	Total- USD \$6,700 Including Tax and Services	Total- USD\$4,500 Including Tax and Services	Total-USD \$6,400 Including Tax and Services	
AV Estimated Costs:	No AV information	Total-USD \$370 Including Labor, Tax, and Services	Need more information	Total-USD \$993 Including Labor, Tax, and Services	
Internet - Guest Room	Complimentary	Complimentary	Complimentary	Complimentary Included in \$10 Resort Charge	Complimentary
Internet - Meeting Room	Complimentary	Complimentary	USD \$386.25 Including Tax and Services for both days	USD \$19.95 Per Item (+Tax and Service) In house provider is Encore Event Technologies. Pricing link is provided below: http://www.groveparkinn.com/media/1855150/1141_pg20 14_v3.pdf	Complimentary
Miscellaneous Costs					
Miscellaneous - Housekeeping		USD \$4.00 Per Day (Inclusive)	N/A	Complimentary Housekeeping gratuity is at the guest's discretion.	N/A
Miscellaneous - Parking Fee - Self	No on site self-parking	Complimentary will attach Averages	Complimentary	USD \$15.00 Per Day (Inclusive)	Complimentary
Miscellaneous - Parking Fee - Valet	USD \$18.00 Per Item (+Tax and Service)	USD \$18.00 Per Day (Inclusive)	N/A	USD \$22.00 Per Day (Inclusive)	Available upon request
Additional Questions Hotel agrees there will be no attrition on sleeping rooms. If no, what is your proposed rate? Hotel will agree to an actual 21-day cutoff with a	Disagree - proposed rate: 80%	Disagree - proposed rate: 10% slippage at 30 day cutoff	Disagree - proposed rate: 80%	Disagree - proposed rate: responsible for 90% of sleeping rooms blocked	Disagree - proposed rate: 80%
published cutoff of 30 days. Hotel will continue to accept reservations at group rate if group exceeds the block as well as after cutoff date if	Agree	Agree	Agree	Disagree	
rooms are available.	Yes	Yes	Yes	No	No
Will hotel offer 1/40 comp policy on a cumulative basis? If no, proposed alternative:	No.	No - alternative: No comp rooms	Yes	No - alternative: 1 per 50 comp	Yes
Will hotel provide complimentary internet in all guest	res	No - alternative: No comp rooms	res	No - alternative: 1 per 50 comp	res
rooms?	Yes	Yes	Yes	Yes	Yes
				Cuoted rates are subject to a daily resort charge, currently \$10 per room, which includes: Basic high-speed wireless internet access Nightly turndown service upon request Access to our State-of-the-Art Sports Complex Use of our outdoor tennis courts Unlimited local and toll-free calls In-room hot beerage program – Keurig system and coffees Access to Elaine's Dueling Piano Bar (Thursday- Saturday) Alesort ground shuttle service Guided history tours (reservations recommended) Daily Local or National Newspaper	
Does your hotel have any resort fees over and above				Access to outdoor Cabana Pool Bar & Grill (seasonal)	
your standard room rate? If so, please list all fees.	No resort fees	No resort fees	No Resort Fees.	Access to the original Sunset Hiking Trails (2.5 miles)	No
Will hotel provide a discount off published current year			l.		
menu prices? If yes, please advise % amount:	No	No	No	Yes - %: 10	
Will hotel provide complimentary internet access in meeting rooms? If no, what discount will hotel	V	Y	No. discourte 00/	No Here wet (210.05 per deu)	N
provide? Is there a sound system in all rooms?	Yes Yes	Yes Yes	No - discount: 0% No - comments: not available	No - discount: \$19.95 per device Yes	Yes Yes
Does hotel have renovation or expansion plans		***			
between now and the meeting dates? If yes, provide details including start and completion dates:	No- new build hotel in 2009	NO	Sleeping rooms will be renovated. Start date is June 2015	No	

#### ALI 2015 Fall Meeting -Submitted Proposals RFP code: C9NGVIY2MML ALI 2015 Fall Meeting Event Dates: 20-Sep-2015 to 21-Sep-2015 Prepared By: Susan Gilbert

Supplier Information					
Name:	Grand Bohemian Hotel Asheville, Autograph Collection	Inn On Biltmore Estate	Renaissance Asheville Hotel	The Omni Grove Park Inn	Hilton Asheville Biltmore Park
Hotel will provide 1 Suite complimentary for the Association President. If no, proposed alternative:	No - alternative: 1 suite upgrade at group rate	No - alternative: I will give one upgrade to a King Grande room		No - alternative: 1 comp upgrade to Premium Mountain View at group rate	Suite Upgrade
Hotel will provide (1) discounted guestroom at 50% off group rate for Executive Director.		No - comment: 20 % discount	No - comment: 0%	No - comment: 1 comp upgrade to Mountain View at group rate	Yes
Will hotel provide one complimentary microphone in each meeting room?	No	No	No	No	



#### AMERICAN LADDER INSTITUTE 2015 SPRING CONFERENCE ASSOCIATES COMMITTEE TUESDAY, MARCH 10, 2015 8:00 am – 8:15 am LOEWS VENTANA CANYON



Keith Liskey – Chair, Strongwell Corporatio Manny DeSantis, Valley Fastener Group Jerry Trolz, Goshen Stamping Company

#### **AGENDA**

- I. Call to order
- I. Review/Approval of Fall Conference meeting minutes
- II. Associates Events
  - a. Review Spring Conference Associates Event i. Pinnacle Pete's
  - b. Event ideas for Fall Conference
    - i. Sponsorship amount
- III. Associates Fund
  - a. 2015 Balance pre Spring Conference: \$2700
    - i. Anticipated Spring Conference sponsor revenue: \$2700
    - ii. Projected Spring Conference expenses: \$2,600 approx.\$3,100 depending on cocktail/wine/beer consumption
- IV. Future Conferences
  - a. Associate Events
  - b. Associate presentation at future conferences
- V. New business
- VI. Adjournment

#### AMERICAN LADDER INSTITUTE ASSOCIATES COMMITTEE MISSION STATEMENT

The ALI Associates Committee is responsible for discussion and review of those areas that are of special interest to ALI Associate Members. These matters could include:

- Manufacturer/distributor interaction
- Maintenance of the associates capability handbook
- Review of Associates Conference reception



AMERICAN LADDER INSTITUTE 2014 FALL CONFERENCE ASSOCIATES COMMITTEE MONDAY, SEPTEMBER 22, 2014 2:00 pm – 2:30 pm THE HAY ADAMS HOTEL WASHINGTON, DC



Keith Liskey – Chair, Strongwell Corporation Jerry Trolz, Goshen Stamping Company Marc McConnell, Bauer Corporation Jimmy Varisco, Batavia Services, Inc. Rob Touzalin, American Roll Form Products

#### <u>Minutes</u>

#### 1. Call to order

- Keith Liskey called the meeting to order.
- 2. Review/Approval of Spring Conference meeting minutes
  - Minutes from the Spring Conference were reviewed and approved.

#### 3. Spring Conference

Location Review – The Hay Adams

• The committee would like to revisit the room set up and food that is provided at the meeting. They prefer to start the evening with appetizers and then have a light dinner with enough tables/chairs. The meeting format was good. No changes noted.

Future Conferences

Spring 2015 Conference

• Based on the RFP grid, the committee requested that we move into contract with the Ventaya Canyon, March 8-10, 2015.

Fall 2015 Conference

- Location They would like to investigate going to Ashville, NC in September. Need to review Holiday's during that time.
- 4. New business
  - There was no new business.
- 5. Adjournment
  - The meeting was adjourned.



AMERICAN LADDER INSTITUTE 2015 SPRING CONFERENCE GENERAL BUSINESS MEETING TUESDAY, MARCH 10, 2015 8:15 am to 8:30 am



#### LOEWS VENTANA CANYON TUCSON, AZ

President, Ron Schwartz

#### <u>AGENDA</u>

- I. Call to order
- II. Review / Approval of Fall Conference meeting minutes
- III. President's comments
- IV. Additional committee chair reports/comments
- V. Headquarters report
  - a. Financial update
  - b. Membership report
- VI. New business
- VII. Adjournment

#### ALI MISSION STATEMENT

ALI's mission is to promote the safe use of our products as well as to advance the common business interest of our members through a commitment to:

- Development and dissemination of appropriate standards
- Education of the public as to the proper selection, care, and safe use of ladders
- Representation of the interests of its members



AMERICAN LADDER INSTITUTE 2014 FALL CONFERENCE GENERAL BUSINESS MEETING MONDAY, SEPTEMBER 22, 2014 1:15 pm – 2:00 pm THE HAY ADAMS HOTEL WASHINGTON, DC



President, Ron Schwartz ALI Executive Director, Susan Lane

#### Minutes

- I. Call to order President Schwartz called the meeting to order.
- II. Review / Approval of Spring Conference meeting minutes Minutes from the Spring Conference were reviewed and approved.
- III. President's comments
- IV. Additional committee chair reports/comments
- V. Headquarters report

Susan Lane provided a review of the ALI financials to date. Susan Lane reported that all Regular members had renewed and one Associate member had not.

- VI. New business
- VII. Adjournment President Schwartz adjourned the meeting.

#### American Ladder Institute Statement of Financial Position January 31, 2015

#### Assets

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0012-100-1009-0000	PVTB - Checking	185,436
0012-100-1280-0000	Private Bank CD - Maturing 11/01/2014	152,039
0012-100-1285-0000	Private Bank CD - Maturing 8/11/2014	102,626
0012-100-1290-0000	Private Bank CD - Maturing 5/10/2015	101,791
0012-100-1340-0000	Accounts Receivable	2,157
0012-100-1570-0000	Accrued Interest	330
0012-100-1910-0000	Deposit to SmithBucklin Corporation	2,500

Total Assets

546,879 =====

#### Liabilities

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#### Net Assets

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0012-100-2840-0000	Audited Net Assets - 12/31/14	546,351	
0012-100-2800-0000	Audited Future Events Reserve Fund - 12/31/2014	2,739	
0012-100-2999-0000	Year To Date Income (Loss)	(2,211)	
	Total Net Assets		546,879
	Total Liabilities & Net Assets		546,879

#### American Ladder Institute Statement of Activities Summary of All Units For the Month Ending January 31, 2015

		Curren	t Month				2015		
Description	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Annual Budget
Revenue: American Ladder - Revenue	15,608	72,854	(57,246)	21.42%	15,608	72,854	(57,246)	21.42%	258,748
Total Revenue	15,608	72,854	(57,246)	21.42%	15,608	72,854	(57,246)	21.42%	258,748
Expenses: American Ladder - Expenses	17,819	27,173	9,353	65.58%	17,819	27,173	9,353	65.58%	280,146
Total Expenses	17,819	27,173	9,353	65.58%	17,819	27,173	9,353	65.58%	280,146
Net Income (Loss)	(2,211)	45,682	(47,893)	-4.84%	(2,211)	45,682	(47,893)	-4.84%	(21,398)

#### American Ladder Institute Statement of Activities American Ladder For the Month Ending January 31, 2015

		Curren	t Month			Year-te	o-Date		2015
Description	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Annual Budget
Revenue:	45 400	70 700	(57.040)	24.20%	45 400	70 700	(57.040)	24 200/	257 249
Operating - Revenue Investements - 990 - Revenue	15,489 119	72,729 125	(57,240) (6)	21.30% 95.06%	15,489 119	72,729 125	(57,240) (6)	21.30% 95.06%	257,248 1,500
Total Revenue	15,608	72,854	(57,246)	21.42%	15,608	72,854	(57,246)	21.42%	258,748
Expenses: Operating - Expenses	17,819	27,173	9,353	65.58%	17,819	27,173	9,353	65.58%	280,146
- Total Expenses	17,819	27,173	9,353	65.58%	17,819	27,173	9,353	65.58%	280,146
- Net Income (Loss)	(2,211)	45,682	(47,893)	-4.84%	(2,211)	45,682	(47,893)	-4.84%	(21,398)

#### American Ladder Institute Statement of Activities Operating For the Month Ending January 31, 2015

		Current	Month			2015			
Description	Actual Budget F		Variance Fav /(Unfav)	% of Budget	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Annual Budget
Revenue:									
Administrative - 110 - Revenue	13,024	63,632	(50,608)	20.47%	13,024	63,632	(50,608)	20.47%	125,248
Spring Meeting - 111 - Revenue	1,550	2,300	(750)	67.39%	1,550	2,300	(750)	67.39%	18,700
Fall Meeting - 112 - Revenue	0	0	0	0.00%	0	0	0	0.00%	16,700
Standards - 160 - Revenue	915	6,797	(5,882)	13.46%	915	6,797	(5,882)	13.46%	96,600
Total Revenue	15,489	72,729	(57,240)	21.30%	15,489	72,729	(57,240)	21.30%	257,248
Expenses:									
Administrative - 110 - Expenses	15,138	19,573	4,434	77.34%	15,138	19,573	4,434	77.34%	220,690
Spring Meeting - 111 - Expenses	2,581	1,600	(981)	161.33%	2,581	1,600	(981)	161.33%	17,651
Fall Meeting - 112 - Expenses	100	0	(100)	0.00%	100	0	(100)	0.00%	16,650
Standards - 160 - Expenses	0	6,000	6,000	0.00%	0	6,000	6,000	0.00%	25,155
Total Expenses	17,819	27,173	9,353	65.58%	17,819	27,173	9,353	65.58%	280,146
Net Income (Loss)	(2,330)	45,557	(47,887)	-5.11%	(2,330)	45,557	(47,887)	-5.11%	(22,898)

#### American Ladder Institute SmithBucklin Fees Statement January 31, 2015

		Current				Current Ye			2015
Description	Actual	Budget	Variance Fav/(Unfav)	% of Budget	Actual	Budget	Variance Fav/(Unfav)	% of Budget	Annual Budget
As Compared to the ASAE Operating Report:									
ALI Executive Director/Management & Headquarters	\$5,167	\$5,166	(\$1)	100%	\$5,167	\$5,166	(\$1)	100%	\$62,000
ALI Administrative Services	\$4,216	\$4,666	\$450	90%	\$4,216	\$4,666	\$450	90%	\$56,000
Marketing & Communication Services	\$321	\$3,266	\$2,945	10%	\$321	\$3,266	\$2,945	10%	\$39,200
Event Services	\$2,200	\$1,000	(\$1,200)	220%	\$2,200	\$1,000	(\$1,200)	220%	\$9,000
Financial Management & Accounting Services	\$1,330	\$1,330	(\$0)	100%	\$1,330	\$1,330	(\$0)	100%	\$15,965
SmithBucklin Fees Compared to ASAE	\$13,234	\$15,428	\$2,194	86%	\$13,234	\$15,428	\$2,194	86%	\$182,165
Total Revenue	\$15,807	\$72,854	(\$57,047)	22%	\$15,807	\$72,854	(\$57,047)	22%	\$258,748
Total Expenses	\$17,819	\$27,173	\$9,353	66%	\$17,819	\$27,173	\$9,353	66%	\$280,146
SmithBucklin Fees as a % of Total Revenue SmithBucklin Fees as a % of Total Expenses									70.40% 65.03%
ASAE Operating Ratio, Weighted Average (12th, 13th & 2011 I	Editions)								52%
Other SmithBucklin Fees:									
Information Technology Services	\$1,292	\$1,292	\$0	100%	\$1,292	\$1,292	\$0	100%	\$17,000
Design and Creative Services	\$0	\$0	\$0	0%	\$0	\$0	\$0	0%	\$750
Other SmithBucklin Fees	\$1,292	\$1,292	\$0	100%	\$1,292	\$1,292	\$0	100%	\$17,750
Total Current Fiscal Year Fees	\$14,526	\$16,720	\$2,194	87%	\$14,526	\$16,720	\$2,194	87%	\$199,915

Management & Headquarters and Staff billing rates include the following expenses:

1. Salary & Benefits: salary, bonus, taxes, medical, dental & vision insurance, Rx drug program, 401k, workman's comp, life insurance, and long &

short term disability insurance.

2. Occupancy: rent, repairs, maintenance, furniture, utilities and meeting space.

3. Senior Management: senior management support for executives and their teams.

4. Technology & Support: desktop/laptop, docking stations, software suite, network services, internet access, printing services and all technical support and maintenance.

5. Human Resources: recruitment, search fees, corporate communications, complete hire/fire function, salary/beneftis/bonus program administration, and all social functions.

6. Professional Development: orientation, education and training, best practices, recognition, employee assistance/counseling, and tuition assistance.

7. Administrative Services: corporate finance, mailroom services, reception staff, office services/housekeepint, printing/copying,

and general office supplies.

#### American Ladder Institute Statement of Financial Position December 31, 2014

2,622

## Assets

0012-100-1285-0000 0012-100-1290-0000 0012-100-1340-0000	Private Bank CD - Maturing 11/01/2014 Private Bank CD - Maturing 8/11/2014 Private Bank CD - Maturing 5/10/2015 Accounts Receivable	168,247 152,039 102,626 101,791 20,617	
	Accrued Interest Prepaid Expense - General Deposit to SmithBucklin Corporation Total Assets	211 3,681 2,500	551,712
	Liabilities		
0012-100-2160-0000 0012-100-2410-0000	Due SmithBucklin Corporation Deferred Revenue	1,614 1,008	

Total Liabilities

#### Net Assets

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0012-100-2840-0000 Audited Net Assets - 12/31/2013 0012-100-2800-0000 Audited Future Events Reserve Fund - 12/31/2013 0012-100-2999-0000 Year To Date Income (Loss)	504,046 2,739 42,305
Total Net Assets	549,090
Total Liabilities & Net Assets	551,712 ======

#### American Ladder Institute Statement of Activities Summary of All Units For the Twelve Months Ending December 31, 2014

		Current I	Month			Year-to-	-Date		2014
Description	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Annual Budget
Revenue: American Ladder - Revenue	31,675	15,485	16,190	204.55%	280,506	250,448	30,058	112.00%	250,448
Total Revenue	31,675	15,485	16,190	204.55%	280,506	250,448	30,058	112.00%	250,448
Expenses: American Ladder - Expenses	12,551	14,317	1,766	87.67%	238,202	243,247	5,045	97.93%	243,247
Total Expenses	12,551	14,317	1,766	87.67%	238,202	243,247	5,045	97.93%	243,247
Net Income (Loss)	19,124	1,168	17,956	1637.32% ======	42,305 ====================================	7,201	35,104	587.48%	7,201

#### American Ladder Institute Statement of Activities American Ladder For the Twelve Months Ending December 31, 2014

-		Current				Year-to-Date				
Description	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Actual	Budget	Variance Fav /(Unfav)	% of Budget	Annual Budget	
Revenue:										
Operating - Revenue Investements - 990 - Revenue	31,498 177	15,360 125	16,138 52	205.07% 141.74%	279,162 1,345	248,948 1,500	30,214 (155)	112.14% 89.64%	248,948 1,500	
Total Revenue	31,675	15,485	16,190	204.55%	280,506	250,448	30,058	112.00%	250,448	
Expenses: Operating - Expenses	12,551	14,317	1,766	87.67%	238,202	243,247	5,045	97.93%	243,247	
Total Expenses	12,551	14,317	1,766	87.67%	238,202	243,247	5,045	97.93%	243,247	
Net Income (Loss)	19,124	1,168	17,956	1637.32% ======	42,305	7,201	35,104	587.48%	7,201	

#### American Ladder Institute Statement of Activities Operating For the Twelve Months Ending December 31, 2014

		Current I	Month			2014			
-	\.		Variance % of				Variance	Variance % of	Annual
Description	Actual	Budget	Fav /(Unfav)	Budget	Actual	Budget	Fav /(Unfav)	Budget	Budget
Revenue:									
Administrative - 110 - Revenue	0	0	0	0.00%	126,048	118,048	8,000	106.78%	118,048
Spring Meeting - 111 - Revenue	(1,050)	0	(1,050)	0.00%	16,368	18,700	(2,332)	87.53%	18,700
Fall Meeting - 112 - Revenue	1,850	0	1,850	0.00%	15,984	18,700	(2,716)	85.48%	18,700
Standards - 160 - Revenue	30,698	15,360	15,338	199.86%	120,761	93,500	27,261	129.16%	93,500
Total Revenue	31,498	15,360	16,138	205.07%	279,162	248,948	30,214	112.14%	248,948
Expenses:									
Administrative - 110 - Expenses	11,811	14,042	2,231	84.11%	179,924	185,901	5,977	96.78%	185,901
Spring Meeting - 111 - Expenses	175	175	0	100.00%	15,039	16,075	1,036	93.56%	16,075
Fall Meeting - 112 - Expenses	100	100	0	100.00%	16,506	15,125	(1,381)	109.13%	15,125
Standards - 160 - Expenses	465	0	(465)	0.00%	26,733	26,146	(587)	102.24%	26,146
Total Expenses	12,551	14,317	1,766	87.67%	238,202	243,247	5,045	97.93%	243,247
Net Income (Loss)	18,947	1,043	17,904	1816.56%	40,960	5,701	35,259	718.47%	5,701

#### American Ladder Institute SmithBucklin Fees Statement December 31, 2014

		Current				Current Ye			2014 Annual
Description	Actual	Budget	Variance Fav/(Unfav)	% of Budget	Actual	Budget	Variance Fav/(Unfav)	% of Budget	Annual Budget
As Compared to the ASAE Operating Report:									
ALI Executive Director/Management & Headquarters	\$4,823	\$4,822	(\$1)	100%	\$57,875	\$57,875	(\$0)	100%	\$57,875
ALI Administrative Services	\$2,046	\$4,303	\$2,257	48%	\$51,684	\$51,691	\$7	100%	\$51,691
Marketing & Communication Services	\$134	\$945	\$811	14%	\$15,003	\$15,150	\$147	99%	\$15,150
Event Services	\$275	\$275	\$0	100%	\$7,850	\$8,750	\$900	90%	\$8,750
Information Technology Services	\$0	\$0	\$0	0%	\$300	\$0	(\$300)	0%	\$0
Financial Management & Accounting Services	\$1,292	\$1,288	(\$4)	100%	\$15,500	\$15,500	\$0	100%	\$15,500
SmithBucklin Fees Compared to ASAE	\$8,569	\$11,633	\$3,064	74%	\$148,212	\$148,966	\$754	99%	\$148,966
Total Revenue	\$31,675	\$15,485	\$16,190	205%	\$280,506	\$250,448	\$30,058	112%	\$250,448
Total Expenses	\$12,551	\$14,317	\$1,766	88%	\$238,202	\$243,247	\$5,045	98%	\$243,247
SmithBucklin Fees as a % of Total Revenue SmithBucklin Fees as a % of Total Expenses									59.48% 61.24%
ASAE Operating Ratio, Weighted Average (12th, 13th & 2011 Editions)									52%
Other SmithBucklin Fees:									
Information Technology Services	\$1,395	\$1,288	(\$107)	108%	\$15,684	\$15,500	(\$184)	101%	\$15,500
Design and Creative Services	\$0	\$0	\$0	0%	\$500	\$500	\$0	100%	\$500
Other SmithBucklin Fees	\$1,395	\$1,288	(\$107)	108%	\$16,184	\$16,000	(\$184)	101%	\$16,000
	=======================================	÷1,200	=======	=======	=======================================	=======	=======	=======================================	
Total Current Fiscal Year Fees	\$9,965	\$12,921	\$2,956 	77%	\$164,396 =	\$164,966	\$570 	100%	\$164,966
Future Fisical Year SmithBucklin Fees:									
Event Services	\$0	\$0	\$0	0%	\$900	\$0	(\$900)	0%	\$0
Total Future Fiscal Year Fees	\$0	\$0	\$0	0%	\$900	\$0	(\$900)	0%	\$0

Management & Headquarters and Staff billing rates include the following expenses:

1. Salary & Benefitis: salary, bonus, taxes, medical, dental & vision insurance, Rx drug program, 401k, workman's comp, life insurance, and long &

short term disability insurance.

2. Occupancy: rent, repairs, maintenance, furniture, utilities and meeting space.

3. Senior Management: senior management support for executives and their teams.

4. Technology & Support: desktop/laptop, docking stations, software suite, network services, internet access, printing services and all technical

support and maintenance.

5. Human Resources: recruitment, search fees, corporate communications, complete hire/fire function, salary/beneftis/bonus program administration, and all social functions.

6. Professional Development: orientation, education and training, best practices, recognition, employee assistance/counseling, and tuition assistance.

7. Administrative Services: corporate finance, mailroom services, reception staff, office services/housekeepint, printing/copying,

and general office supplies.

2015 ALI DUES			
Name	Company	Member Type	Status
Rob Touzalin	American Roll Formed Products	Α	Paid
Jimmy Varisco	Batavia Services, Inc.	А	Paid
Gerald Trolz	Goshen Stamping Company, Inc.	А	Paid
Anthony Console	Owens Corning	А	Paid
Keith Liskey	Strongwell Corporation	А	Paid
Manny DeSantis	Valley Fastener Group	А	Paid
Marc H. McConnell	Babcock / Bauer Ladder	R	Paid
Larry Voris	Cosco Home & Office	R	Paid
Tom Schmitt	Louisville Ladder Group	R	Paid
Alan Kline	Lynn Ladder & Scaffolding Co. Inc.	R	Paid
Jerry Hook	Stokes Ladders, Inc.	R	Unpaid
Ron Schwartz	Tri-Arc Manufacturing	R	Pending Payment
Dennis Simpson	Tricam Industries	R	Unpaid
Dave Plotner	Werner Company	R	Paid
Ryan Moss	Wing Enterprises, Inc. dba Little Giant	R	Unpaid
	2015 Budget	2015 Actuals	
	Assoc. Dues: \$ 6,048	\$6,048	
	Reg. Dues: \$ 120,200	\$76,600	
	2015 Total Projected: \$ 126,248	\$81,640	



### American Ladder Institute 2015 Board of Directors

#### President Ronald Schwartz

TRI-ARC Manufacturing 390 Fountain Street Pittsburgh, PA 15238 Phone: 412-826-8531 Ext. 336 Fax: 412-826-8532

#### ron@tri-arc.com

President of Board Term Expires 2015 Past President 2016

#### Secretary/Treasurer Tom Schmitt

Louisville Ladder 7765 National Turnpike Louisville, KY 40214 Phone: 502-635-9343 Fax: 502-635-9358

tom.schmitt@louisvilleladder.com

**Board Term Expires 2015** 

Keith Liskey Strongwell Corporation 400 Commonwealth Avenue P.O. Box 580 Bristol, VA 24203-0580 Phone: 276-645-8000 Fax: 276-645-8132 kliskey@strongwell.com

**Board Term Expires 2016** 

#### Immediate Past President Marc McConnell

Bauer Corporation P.O. Box 6219 Kinston, NC 28501 Phone: 252-523-5200 Fax: 252-523-7211

#### Vice President Ryan Moss

Wing Enterprises, Inc. 1198 N. Spring Creek Pl. Springville, UT 84663 Phone: 801-489-3684 Fax: 801-489-3685

ryan@ladders.com

Board Term Expires 2016 Term as VP expires in 2015

#### Rob Touzalin (2012)

American Roll Form Products. 892 Callendar Blvd. Painesville, OH 44077 Phone: 440-352-0753 Fax: 440-352-1959

rtouzalin@arfpcorp.com

#### **Board Term Expires 2015**

Dave Plotner Werner Co. 93 Werner Rd Greenville, PA 16125 Phone: 724-588-2000 (x2576) Fax: 724-588-2448

plotnde@wernerco.com

**Board Term Expires 2017** 

- Officers serve 3 year terms
- Associates serve 3 year terms
- All other Directors serve 4 year terms
- Terms expire in the fall of year noted



#### Babcock Co, Inc. Bauer Corporation

Marc H. McConnell P.O. Box 6219 Kinston, NC 28501 Ph: (800) 953-2251 Fax: 252-523-7211 Email: marcmc8867@yahoo.com

#### Cosco Home and Office Products

Larry Voris 2525 State Street Columbus, IN 47201 PH: 812-314-4366 Fax: 812-348-2215 Email: Ivoris@coscoproducts.com

#### Louisville Ladder, Inc.

Tom Schmitt 7765 National Turnpike Unit 190 Louisville, KY 40214 PH: 502-635-9343 FAX: 502-635-9358 Email: tom.schmitt@louisvilleladder.com www.louisvilleladder.com

#### Lynn Ladder &

Scaffolding Co. Inc. Alan Kline Scaffold & Access Industry Association, Inc. 20 Boston Street Lynn, MA 01904 PH: 707-279-4306 x424 Fax: 781-593-7666 Email: ADK@lynnladder.com

#### ALI Regular Members February 2015

#### Stokes Ladders, Inc.

Jerry Hook 4545 Renfro Drive P.O. Box 445 Kelseyville, CA 95451 PH: 707-279-4306 Fax: 707-279-2232 Email: jerry@stokesladders.com

#### **Tri-Arc Manufacturing**

Ron Schwartz 390 Fountain Street Pittsburgh, PA 15238 PH: 412-826-8531 ext. 336 Fax: 412-826-8532 Email: ron@tri-arc.com

#### **Tricam Industries**

Dennis Simpson 7677 Equitable Drive Eden Prairie, MN 55344 PH: (800) 867-6763 x 221 Fax: 952-897-0203 Email: dsimpson@tricam.com

#### Werner Company

Dave Plotner Green Bull/Louisville Division 93 Werner Rd. Greenville, PA 16125 PH: (724) 588-2000 x2576 Fax: 724-588-2448 Email:plotnde@wernerco.com

#### Wing Enterprises, Inc.

Ryan Moss 1325 W. Industrial Circle Springville, UT 84663 PH: 801-489-3684 Fax: 801-489-3685 Email: ryan@ladders.com

#### ALI Membership Report

9 Regular Members 6 Associate Members



#### American Roll Form Products

Rob Touzalin 892 Callendar Blvd. Painesville, OH 44077 PH: 440-352-0753 FAX: 440-352-1959 rtouzalin@arfpcorp.com www.arfpcorp.com B,H

#### Batavia Services, Inc.

Jimmy Varisco 2500 Bayport Blvd. Seabrooke, TX 77586 PH: 281-474-2474 x 3041 FAX: 281-474-2484 jvarisco@bataviainc.com www.bataviainc.com E,F

#### **Goshen Stamping** Company

Jerry Trolz 1025 South 10th Street P.O. Box 802 Goshen, IN 46526 PH: 574-533-4108 FAX: 574-534-4189 jtrolz@goshenstamping.com www.goshenstamping.com

A,B,C,E,F,G,H,I

#### **ALI Associate Members** February 2015

#### **Strongwell Corporation**

Keith Liskey P.O. Box 580 Bristol. VA 24203-0580 PH: 276-645-8039 FAX: 276-645-8132 kliskey@strongwell.com www.strongwell.com **Pultruded Fiberglass** 

#### **Valley Fastener Group**

Manny DeSantis 1490 Mitchell Road Aurora, IL 60504 PH: 630-299-8910 FAX: 630-892-4916 Cell: 630.464.6466 mannv@vallevfastener.com www.vallevrivet.com

Rivets, Screws, Weld-Nuts, **Cold-Headed Specials** 

#### **Owens Corning**

Anthony Console 4172 Wincrest Lane Rochester, MI 48306 PH: 248-371-1815 FAX: 419-325-6194 Anthony.console@owenscorn ing.com www.owenscorning.com

#### Product Listing

- **A.** Portable Wood Ladders
- **B.** Portable Metal Ladders
- **C.** Fixed Ladders
- **D.** Job-Made Ladders
- E. Reinforced Plastic Ladders
- F. Rolling Ladders
- G. Disappearing Attic Stairways
- H. Special Duty Ladders
- I. Utility Step Stools





# Monday, March 9 Meet for drinks at 6:00pm

Join fellow ALI members for a drink and a gun show, courtesy of the Pinnacle Pistoleros, before settling in for a steak dinner. A Tucson favorite since 1962, the Pinnacle Peak Steakhouse upholds a strict "No Ties Allowed" policy and delivers Western food with Old West style. *A special thanks to our Associate Sponsors:* 















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