

2015

The National Insulation Association's

# ANNUAL REPORT

**NIA** | National Insulation  
Association

THE VOICE OF THE INSULATION INDUSTRY™

**MAKING A  
GLOBAL DIFFERENCE**



## 2015–2016 NIA BOARD OF DIRECTORS

**Front Row (left to right):**

P. Thomas Fraatz, *NIA Past President*  
Mark Duppler, *Bay Industries, Inc.*  
Ed Mahoney, *Regal Insulation Corp.*  
Matt Caldwell, *Caldwell Insulation, Inc.*  
J. Kenneth Freeman, *Petrin Corp.*  
Dana Vlk, *Distribution International, Inc.*  
Ron King, *NIA Consultant and Past President*  
Joe Leo, *Atlantic Contracting & Specialties, Inc.*  
Tim Stout, *Hudson Bay Insulation Co.*  
Darrel Bailey, *Performance Contracting, Inc.*

**Back Row (left to right):**

John Lamberton, *Irex Contracting Group*  
Jeffrey DeGraaf, *Industrial Construction & Engineering Co.*  
J. David Gottlich, *Brace Integrated Services*  
David Dzina, *Distribution International, Inc.*  
Dave Cox, *Owens Corning*  
Steve Luse, *Luse Thermal Technologies*  
Mike Bedford, *Shook & Fletcher Insulation Co.* (through Summer 2015)  
Dan Bofinger, *Winroc-SPI*  
Mark Reed, *Zampell Companies* (through Summer 2015)  
Jim Gribbins, *Gribbins Insulation Co., Inc.*

**Not Pictured:**

Doug Bolen, *Knauf Insulation, Inc.*  
Jason Heath, *Zampell Companies* (replacing Mark Reed)  
Gary Auman, *NIA Legal Counsel, Dunlevey, Mahan & Furry*  
Michele M. Jones, *NIA Executive Vice President/CEO*

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➤ This year's *Annual Report* is being distributed as a digital publication, enabling NIA to share many more resources and news items that are available online. All clickable links are colored **turquoise**.

**NIA** | National Insulation Association  
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# LEADERSHIP MESSAGE



J. Kenneth Freeman



Michele M. Jones

The work NIA has accomplished in 2015 is a strong testament to the importance of association membership; we look forward to sharing all of NIA’s accomplishments in our 2015 *Annual Report*. In the past year, NIA broke new ground with redesigned events and offered our members numerous avenues to develop knowledge and skills to grow their businesses.

One of our biggest projects in 2015 was redesigning our fall member meeting, the Fall Summit (formerly Committee Days), and combining it with the first-ever mechanical insulation trade show in North America: Insulation Expo (IEX) USA. When evaluating our fall meeting, we focused on member-driven content and providing real value our members could translate into actionable items to grow their businesses. Toward this end, we opened up committee meetings to allow everyone to attend, invited speakers to committee meetings to facilitate forum-style discussions, added pre-Fall Summit training sessions and a separate IEAP class to the end of the meeting, and most importantly, we held our event contemporaneously with Reed Exhibitions’ IEX USA trade show. Collaborating with Reed to bring this trade show to our members was a way to bring our members together with the insulation end-user audience looking for more information about insulation materials and accessories. We are happy to report that attendance at the 2015 Fall Summit more than doubled from previous years, and 100% of survey respondents rated the program content and education as meeting or exceeding their expectations.

NIA also celebrated 60 years of meetings with the 60<sup>th</sup> Annual Convention in 2015, which was held in San Antonio, Texas, at the JW Marriott San Antonio Hill Country Resort & Spa. During this special Convention, we honored the incredible gathering of past leaders of our association and offered members numerous opportunities to learn and network during educational sessions and nighttime events. We received exceptionally high marks from attendees—100% of attendees responded that networking with current customers met or exceeded expectations, and 93% rated the quality of the educational sessions as excellent or good.

*Insulation Outlook* magazine also celebrated 60 years in 2015, a milestone that was recognized in the special State of the Industry double issue. In 2004, the association decided to reformat *Insulation Outlook* from a member magazine to one for engineers, specifiers, and members of the construction industry. Our 2015 survey feedback indicates that the shift has been enormously successful and that engineers now view our publication as the leading source of news about proper applications, insulation products, and best practices. In fact, survey feedback indicates that readers’ actions are influenced by the magazine, with one reader commenting that the articles “assisted us to change our technical specifications.” Other readers made similar comments, calling the magazine “Incredibly helpful. We are a consulting engineering firm and specifying insulation properly. . . is a big concern,” and that “I make it required reading for our PMs and Estimators.” It is the content from our members and staff that make this success possible. We also published the results from the Foundation’s biennial insulation industry-measurement survey in 2015. This year, for the first time, the survey was expanded to include a methodology for measuring market size and growth rates for laminated metal building insulation.

These are just some of NIA’s amazing accomplishments in 2015, and we hope all our members will take the time to review our *Annual Report* and see everything that their support and participation has brought forth in the past year. It is through the active participation and feedback of our membership that we are able to develop new initiatives, grow our association, and offer more valuable training programs, events, and resources to our members.

J. Kenneth Freeman  
NIA President  
Petrin Corp.

Michele M. Jones, CMP  
NIA Executive Vice President (EVP)/  
Chief Executive Officer (CEO)

## MISSION

NIA is a not-for-profit organization representing all facets of the commercial, industrial, and mechanical insulation industry. NIA is led and funded by its members, and it operates through a committee structure. These committees and various task forces review and assess issues and recommend actions to NIA’s Board of Directors. Approved actions are then carried out by staff.

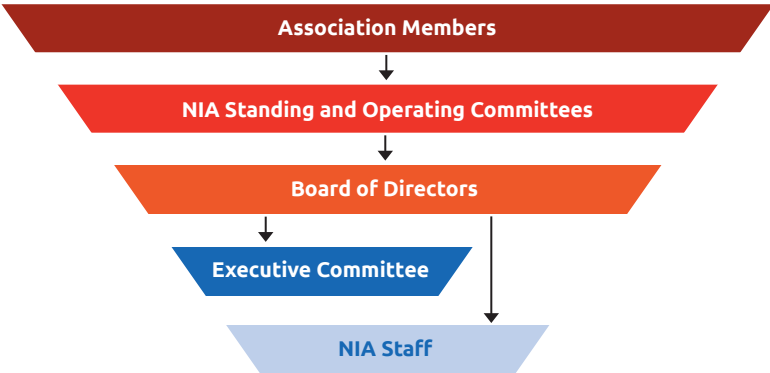
NIA’s membership consists of merit (open shop) and union Contractors, Distributors, Laminators, Fabricators, and Manufacturers. These companies provide thermal insulation, insulation accessories, and components to the commercial, mechanical, and industrial markets throughout the nation. Since 1953, this Northern Virginia-based association has been the voice of the insulation industry, dedicated to keeping the commercial and industrial insulation industry up-to-date on the latest industry trends and technologies.

## MISSION STATEMENT

NIA’s mission is to increase the success and professionalism of its membership through:

- Strengthening and developing the insulation industry;
- Elevating the image of the standards of the industry;
- Keeping members informed of important industry-related developments; and
- Serving as an effective industry representative with outside groups, such as government and labor.

## ASSOCIATION ORGANIZATION CHART



## 2015–2016 NIA’S BOARD OF DIRECTORS

### PRESIDENT

J. Kenneth Freeman, *Petrin Corp.*

### PRESIDENT-ELECT

Steve Luse, *Luse Thermal Technologies*

### SECRETARY/TREASURER

Darrel Bailey, *Performance Contracting, Inc.*

### ASSISTANT TREASURER

Dan Bofinger, *Winroc-SPI*

### IMMEDIATE PAST PRESIDENT

David Dzina, *Distribution International*

### REGIONAL REPRESENTATIVES

Jim Gribbins, *Gribbins Insulation Company, Inc. (CSIA)*  
Joe Leo, *Atlantic Contracting & Specialties, LLC (ESICA)*  
Jeffrey DeGraaf, *Industrial Construction & Engineering Company (MICA)*  
Matt Caldwell, *Caldwell Insulation, Inc. (SEICA)*  
J. David Gottlich, *Brace Integrated Services (SWICA)*  
Tim Stout, *Hudson Bay Insulation Company (WICA)*

### AT-LARGE REPRESENTATIVES

Mark Duppler, *Bay Industries, Inc.*  
Jason Heath, *Zampell Companies*  
John Lamberton, *Irex Contracting Group*  
Ed Mahoney, *Regal Insulation Corp.*  
Dana Vlk, *Distribution International, Inc.*

### ASSOCIATE REPRESENTATIVES

Doug Bolen, *Knauf Insulation*  
Dave Cox, *Owens Corning*

### PAST PRESIDENT ADVISORS

P. Thomas Fraatz, Honorary Member  
Ronald King, NIA Consultant

### NIA EXECUTIVE VICE PRESIDENT (EVP)/CHIEF EXECUTIVE OFFICER (CEO)

Michele M. Jones, CMP

### GENERAL COUNSEL

Gary Auman, *Dunlevey, Mahan & Furry*

# MEMBERSHIP



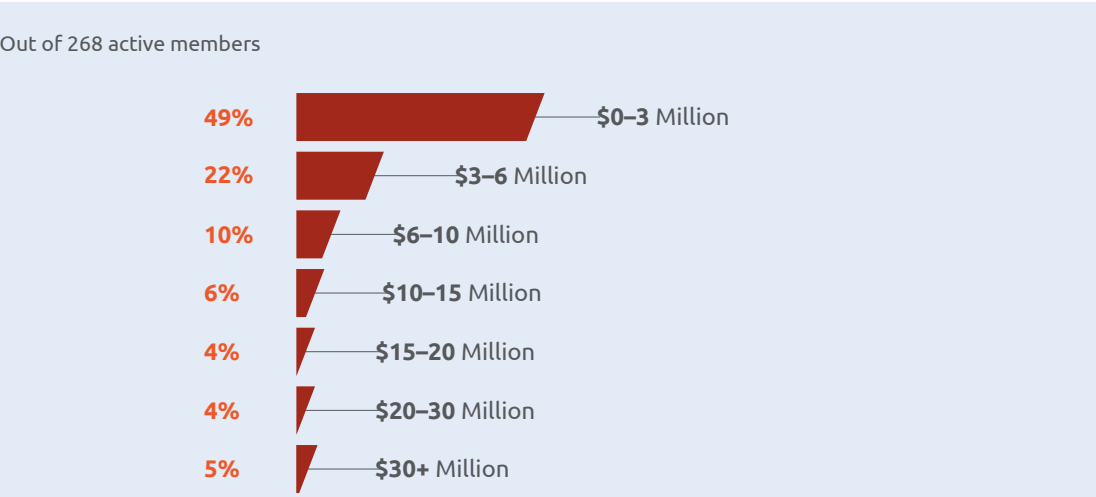
NIA is the voice of Contractors, Manufacturers, Distributors, Fabricators, Metal Building Laminators, and others in the commercial, industrial, and mechanical insulation industry. Membership in NIA is on an annual basis; in 2015, NIA represented 326 member companies as well as 400 branch locations of those companies, representing 726 locations.

NIA members lead the association through a committee structure. In 2015, 14 committees met to fulfill their purposes and objectives, including reviewing issues and recommending actions to NIA’s Board of Directors during 2 main member events.

## ACTIVE MEMBERS BY REVENUE CATEGORY

### Active Members (Contractors, Distributors, Laminators, and Fabricators) by Size (Annual Revenue in Millions)

Contractors, Distributors, Fabricators, and Laminators represent 82% of NIA’s total membership. Of these members, 71% have annual sales of \$6 million or less:



## MEMBERS BY MEMBERSHIP TYPE

### Member Demographics



# NIA COMMITTEE STRUCTURE

## INDUSTRY-SPECIFIC OPERATING COMMITTEES

### Associates Committee

**Chairman:** Dave Cox, Owens Corning

**Vice Chairman:** Jake Erickson, Roxul Technical Insulation

**Secretary:** Jack Bittner, Industrial Insulation Group

The Associates Committee—composed of NIA’s Manufacturers, Manufacturers’ Representatives, and Associate suppliers—strengthens and expands the insulation industry through education, technical assistance, and association membership growth. In 2015, the Committee:

- Elected Jack Bittner from Industrial Insulation Group as the new Secretary;
- Reviewed the latest results from the 2014 Industry Measurement Survey, conducted in January 2015;
- Updated the Manufacturer by Product Listing in the *Buyer’s Guide*;
- Received a presentation from Reed Exhibitions on the exhibition and product demonstration opportunities available at the Insulation Expo (IEX) USA trade show;
- Learned about spending trends, economic drivers, and the 2016 outlook for the industrial sector from Brock Ramey, Power Specialist from Industrial Info Resources; and
- Discussed the participation of Associate member VIPs on the upcoming manufacturer panel that will be held during NIA’s 61<sup>st</sup> Annual Convention/WIACO. The panel will discuss topics including: projected industry growth, supply versus demand, globalization, industry consolidation, and much more.

### Distributors/Fabricators Committee

**Chairman:** Michael Benoit, General Insulation Company

**Vice Chairman:** David Hill, Shook & Fletcher Insulation Company

The Distributors/Fabricators Committee promotes the value of the distributor/fabricator to the mechanical insulation industry, helps grow the industry, and provides ongoing education and training to the Distributor/Fabricator members. In 2015, the Committee:

- Elected David Hill of Shook & Fletcher Insulation Company as the new Vice Chair;
- Received a presentation from Reed Exhibitions on the exhibition and product demonstration opportunities available at the Insulation Expo (IEX) USA trade show;
- Learned about spending trends, economic drivers, and the 2016 outlook for the industrial sector from Brock Ramey,

Power Specialist from Industrial Info Resources;

- Decided to have a credit panel discussion at NIA’s 61<sup>st</sup> Annual Convention/WIACO and 4 members volunteered to participate as panelists;
- Updated its Purposes, Objectives, and Actions; and
- Discussed which topics would be of interest for Committee members and decided to include guest speakers at their meetings who would be able to address these topics.

Assorted topics include:

- Marketing the distribution/fabrication industry;
- Using customer data metrics and analytics
- The National Association of Wholesalers-Distributors (NAW) as a resource;
- Relating to Millennials in the workforce;
- Health care, insurance, and the Patient Protection and Affordable Care Act and its impact on businesses and employees;
- Fraud;
- Inventory management; and
- Truck-tracking software.

### Merit Contractors Committee

**Acting Chairman:** Pete Gauchel, L & C Insulation, Inc.

**Vice Chairwoman:** Lauren Francois, L & C Insulation, Inc.

The Merit Contractors Committee promotes the growth of the industrial and commercial merit contractor through education, training, and network exchange. In 2015, the Committee:

- Received a presentation at NIA’s 60<sup>th</sup> Annual Convention from Becky Rinehart, Associated Builders & Contractors, Inc., and Merit Shop Training, Inc., regarding workplace development and career outreach and how to recruit students into the construction field;
- Implemented the same mentoring structure as is utilized in the Membership Committee;
- Discussed how to increase Merit Contractor Committee participation; and
- Began review of the *Careers in Construction* brochure for possible updates in 2016.



Metal Building Laminators Committee

Chairman: Todd Hamilton, Distribution International

Vice Chairman: John Kuduk, API, Inc.

The Metal Building Laminators Committee is composed of laminators of metal building insulation who are dedicated to developing and promoting industry standards and educational programs that will help members become more professional, productive, and profitable. In 2015, the Committee:

- Monitored submittals to ASHRAE on wall and roof assemblies;
- Continued to recruit new NIA Laminator members;
- Began to draft articles for a special metal building insulation issue of *Insulation Outlook* in February 2016;
- Continued research into developing a U-Factor Calculator;
- Invited other associations to attend Committee meetings; and
- Sent a liaison to the Health and Safety Committee to stay updated on safety developments.

Union Contractors Committee

Chairman: Steve Luse, Luse Thermal Technologies

Vice Chairman: John Lamberton, Irex Contracting Group

The Union Contractors Committee promotes the growth of industrial and commercial union contractors through education, training, productivity enhancement, and strong union relations. In 2015, the Committee:

- Welcomed leaders of the International Association of Heat and Frost Insulators and Allied Workers (International) to their October 2015 meeting;
- Welcomed Phillip A. Romello, Senior Vice President and Actuary, Sega, for a conversation on unfunded pension liability issues during their October 2015 meeting;
- Met with the Merit Contractors Committee for a joint speaker session on Risk Management for the Successful Contractor, led by Lewis S. LaClair, CPCU, ARM, AU, President, Advanced Risk Management Corp.
- Updated its Purposes, Objectives, and Actions; and
- Discussed market conditions in each region of the country.

GENERAL OPERATING COMMITTEES

Health and Safety Committee

Chairman: Ed Loosemore, Performance Contracting, Inc.

Vice Chairman: Bill McCaffrey, Irex Contracting Group

The Health and Safety Committee is committed to the health, safety, and welfare of its members, customers, and the insulation industry. Through professional safety leadership, the Committee actively promotes the highest standards of safety and health excellence to ensure a safe working environment. In 2015, the Committee:

- Provided updates regarding the latest Occupational Safety and Health Administration (OSHA) issues;
- Made revisions to the Theodore H. Brodie Distinguished Safety Award applications;
- Created a Metal Building Laminator application for the 2015 Safety Award;
- Conducted a survey regarding member participation in the 2014 Safety Award;
- Hosted a Health & Safety Forum at Fall Summit 2015, which focused on topics such as how to establish a structured safety program and confined spaces; and
- Began review of the NIA *Safety Handbook for Insulation and Abatement Workers* for possible updates in 2016.

Membership Committee

Chairman: Brian Farnsworth, Distribution International

Vice Chairman: Steve Brown, K-FLEX USA, LLC

The Membership Committee represents all membership types, identifies and recruits potential member companies, increases awareness of membership benefits, and encourages participation by NIA members. In 2015, the Committee:

- Provided amenities to new members and first-time attendees at NIA’s 60<sup>th</sup> Annual Convention;
- Continued with its Ambassador Program, which helps to familiarize new members and first timers with the Annual Convention program of events and benefits of membership with NIA and introduces them to fellow industry members;
- Held a member orientation/reception for new and current NIA members at NIA’s 60<sup>th</sup> Annual Convention;
- Continued the development of the member testimonial program;
- Ensured that the Membership Committee participants were representative of all member types, regions, and committees;
- Began discussions on the initiatives related to NIA’s Long Range Plan and ways the Committee can assist; and
- Updated the Committee’s Purposes, Objectives, and Actions.

Technical Information Committee

Chairman: Allen Dickey, Pittsburgh Corning

Vice Chairman: Darrell Peil, Aeroflex USA, Inc.

Secretary: Michael Kehr, HiCube Coatings

The Technical Information Committee (TIC) serves as a forum for identifying and addressing technical issues confronting NIA members. In 2015, the Committee:

- Met 4 times to review technical materials for NIA and *Insulation Outlook* magazine;

- Provided technical assistance to NIA’s partners and members;
- Reviewed all technical articles for the 11 issues of *Insulation Outlook* magazine and suggested topics for future issues;
- Reviewed and updated the *Insulation Science Glossary, Guide to Insulation Product Specifications*, and *Insulation Materials Specification Guide* quarterly;
- Reviewed the products and services offered by NIA and made suggestions for 2016 offerings;
- Audited the technical accuracy of the Insulation Energy Appraisal Program (IEAP), a NIA training class; and
- Researched topics and speakers for the 60<sup>th</sup> and 61<sup>st</sup> Annual Convention technical presentations.

STANDING COMMITTEES

2015 Convention Committee

Chairman: J. Kenneth Freeman, Petrin Corp.

The Convention Committee works with NIA staff to develop and coordinate educational programs and entertainment for NIA’s Annual Convention. In 2015, the Committee:

- Successfully completed NIA’s 60<sup>th</sup> Annual Convention in San Antonio, Texas (see page 21 for a summary).

Long Range Planning Committee

NIA conducts semi-annual strategic planning meetings where NIA leaders examine the goals and priorities for the next 1–5 years. The Long Range Planning Committee convened in July 2015 and the 2-day meeting was facilitated by NIA Past President Tom Fraatz.

Purpose and Focus

The objective of the Long Range Planning Session was to identify 3 or 4 of the most important Strategic Objectives for NIA to focus on over the next few years. A critical goal of this plan is to ensure that progress is made in achieving each of the objectives.

Long Range Planning Committee Members

The following members of the Board of Directors participated in the Long Range Planning Committee:

- Chairman: J. Kenneth Freeman, Petrin Corp.
- David Dzina, Distribution International
- Steve Luse, Luse Thermal Technologies
- Darrel Bailey, Performance Contracting, Inc.
- Dan Bofinger, Winroc-SPI
- Jeff Degraaf, Industrial Construction & Engineering Co.
- Ed Mahoney, Regal Insulation Corp.

- Dana Vlk, Distribution International, Inc.
- Dave Cox, Owens Corning

In addition, Past President and Consultant, Ron King, and staff members Michele M. Jones (Executive Vice President/CEO), Kristin V. DiDomenico (Vice President), Julie McLaughlin (Senior Director of Publications), and Erin Penberthy (Director of Meetings) participated. NIA’s General Counsel Gary Auman was also present.

The meeting developed 4 Strategic Objectives for NIA to focus on over the next several years:

- Develop Long Term Funding—Champion, Ron King
- Increase Membership—Champion, Ed Mahoney
- Improve the Value of Membership—Champion, David Dzina
- Develop a New Website—Champion, P. Thomas Fraatz
- Each objective was assigned a champion, who is responsible for the overall management of the objective and related tasks, and who will make regular progress updates to NIA’s Board of Directors. NIA’s Strategic Plan is available on the Members Only portal on [www.insulation.org](http://www.insulation.org).

Finance Committee

Chairman: Steve Luse, Luse Thermal Technologies

The Finance Committee met in March 2015 to review the Fiscal Year (FY) 2015–2016 budget developed by NIA staff. This budget was approved by NIA membership at the Business Session during NIA’s 60<sup>th</sup> Annual Convention in San Antonio, Texas (see page 29 for audited financials).

Foundation Steering Committee

Co-chairmen: Dan Bofinger, Winroc-SPI and

Dave Cox, Owens Corning

The Foundation Steering Committee develops and implements strategies and recommends processes to advance and expand the commercial and industrial insulation industry. See page 14 for a complete list of Foundation activities.

Nominating Committee

Chairman: J. Kenneth Freeman, Petrin Corp.

The Nominating Committee is responsible for identifying and appointing officers to NIA’s Board of Directors, including At-Large Representatives. This Committee held meetings and presented a slate of nominations to the Board of Directors and the NIA membership for their approval.



# PRODUCTS AND SERVICES



The photos above are from the new *Mechanical Insulation Installation Video Series*.

## PRODUCTS

[www.insulation.org/products](http://www.insulation.org/products)

In 2015, more than 50 products and services were offered by NIA in the following categories: Certification and Training, Educational Resources, Health and Safety Products, and Marketing Tools. Seven new publications were offered in the 2015 Products and Services brochure:

- *Becoming a Digital Distributor: Strategies and Tools That Create Value*
- *Driving Distributor Sales Beyond: Best Practices for Outselling Your Competitors*
- *INNOVATE! How Successful Distributors Lead Change in Disruptive Times*
- *Mechanical Insulation Installation Video Series*
- *The Value of Technology and Data Management for Construction*
- *AGC's Basic Company Safety Program Development Guide*
- *OSHA Compliance Guide, 22<sup>nd</sup> Edition—25<sup>th</sup> Year*

For a complete list of NIA's products, visit [www.insulation.org/products](http://www.insulation.org/products).

## UPDATING OLD PRODUCTS AND CREATING NEW PRODUCTS

### *Mechanical Insulation Installation Video Series (Spanish Version)*

In 2015, NIA began the process of creating a Spanish version of this popular video series. The Spanish translation of the videos is now available for the compilation DVD. The Executive Committee also authorized NIA to research and develop a video-streaming website to host both the English and Spanish versions in 2016. The English version was finished in 2014 and both were created by the industry, for the industry, and provide a general overview and basic how-to guide for mechanical insulation applications. Following is a summary overview of the video content:

- **Overview—introduction and objective of video series**
- General service definitions
- Finish material overview
- General safety precautions
- General application practices
- Inspection and maintenance
- Resource and sponsor listing
- Specific product information within each video
  - Product introduction
  - Insulation application demonstrations
  - Piping, fittings, equipment, ducts, etc.
  - Finish (protective jacketing) application demonstrations

Individual video topics are:

1. Calcium Silicate and Perlite: Pipe and Equipment Insulation
2. Cellular Foam: Pipe and Equipment Insulation
3. Cellular Glass: Pipe and Equipment Insulation
4. Elastomeric and Polyolefin: Pipe, Equipment, and Duct Insulation
5. Fiber Glass: Pipe, Equipment, and Duct Insulation
6. Mineral Wool: Pipe and Equipment Insulation
7. Removable/Reusable Flexible Insulation Covers



## SERVICES AND OTHER RESOURCES

In 2015, NIA offered a number of free services/resources exclusively to members, including:

- The NIA members-only website, featuring committee meeting minutes, a downloadable member of NIA logo, the Electronic Reprint Library, Human Resources Forms, and documents such as employment applications, employee termination forms, evaluations, job descriptions, new employee forms, offer letters, safety checklists, and time-off request forms;
- The online job board at [www.insulation.org](http://www.insulation.org);
- *NIA News*, an exclusive member newsletter;
- Exclusive meetings and discounts on registration for other events; and
- *Insulation Advocate*, a monthly publication that provides an update on the activities of NIA's Foundation for Education, Training, and Industry Advancement.

Updated online resources include the:

- *Guide to Insulation Product Specifications*;
- *Insulation Materials Specification Guide*;
- *Insulation Science Glossary*;
- *Manufacturers' Technical Literature (MTL) Product Catalog*;
- *Mechanical Insulation Design Guide (MIDG)*; and
- *NIA Speaks*, an online map that shows where NIA has given presentations.

Additional NIA member services provided include special offers and discounts, such as:

- Advertising opportunities for NIA members in various media outlets, including *Insulation Outlook*, the *NIA Buyer's Guide: Insulation Products & Providers*, the MTL website, various sponsorship opportunities at Fall Summit (Formerly Committee Days) and the Annual Convention;
- Associated Resource Group (ARG) discounts for all members' voice and data service needs, along with a free initial analysis; and
- The Theodore H. Brodie Distinguished Safety Award. (For more information, see page 27).

## TOP-SELLING ITEMS AND MEMBER FAVORITES

- *Mechanical Insulation Installation Video Series*
- *Insulation Estimator's Handbook*
- *National Commercial and Industrial Insulation Standards Manual, 7<sup>th</sup> Edition*
- *The NIA Insulation Sampler*
- *Safety Handbook for Distributors/Fabricators*
- *Safety Handbook for Insulation and Abatement Workers*

[www.insulation.org/products](http://www.insulation.org/products)




# COMMUNICATIONS

## SOCIAL MEDIA

NIA disseminates information through social media websites using the handle [NIAinfo](#) on Facebook, YouTube, and Twitter. On Twitter, NIA has a second account, [InsulationInfo](#), geared toward the insulation and construction audience rather than the NIA membership audience on [NIAinfo](#). In December, NIA created an account at [Vimeo.com/NIAinfo](#) to stream our training materials and the [Mechanical Insulation Installation Video Series](#).

- NIA currently has 451 people who “like” our NIA Facebook page, 943 Twitter followers for [InsulationInfo](#), and 428 following [NIAinfo](#). All numbers have increased an average of 17% since 2014.
- NIA’s YouTube channel** features videos about NIA, membership in NIA, and useful information about mechanical insulation. Popular videos include the 60<sup>th</sup> Annual Convention celebration videos from members, Reflections from Past Presidents, the new membership video, plus many more. In addition, the introduction to the [Mechanical Insulation Installation Video Series](#) reached more than 1,000 views in 2015. There are also links to member videos that explain the benefits of insulation and how individual products are made and used.
- NIA events, products, publications, advertisers, and activities were promoted through social media.

### VISIT US AT:

-  Facebook [www.facebook.com/NIAinfo](http://www.facebook.com/NIAinfo)
-  Twitter (NIA Information) [www.twitter.com/NIAinfo](http://www.twitter.com/NIAinfo)
-  Twitter (Mechanical Insulation Industry News) [www.twitter.com/InsulationInfo](http://www.twitter.com/InsulationInfo)
-  YouTube [www.youtube.com/NIAinfo](http://www.youtube.com/NIAinfo)
-  [Vimeo.com/ondemand/NIAinfo](http://Vimeo.com/ondemand/NIAinfo) to purchase and stream the [Mechanical Insulation Installation Video Series](#) and other resources

## WEBSITES

[www.Insulation.org](http://www.Insulation.org)

In 2015, improvements and updates to the [www.Insulation.org](http://www.Insulation.org) website included:

- Updating the website on an almost weekly basis to add new content or improve the member experience;
- Adding a News Archive to house NIA’s organizational press releases;
- More frequently updating NIA event content to keep members and users up-to-date on NIA events, including Convention, Fall Summit, the Insulation Energy Appraisal Program (IEAP), webinars, and more;
- Adding a YouTube link to the homepage to allow easier access to NIA videos, including NIA’s membership video, product creation videos, and the 60<sup>th</sup> Anniversary video, *Reflections from Past Presidents*;
- Providing access to *Insulation Advocate*, now a digital-only publication, on NIA’s homepage and maintaining the archives;
- Keeping an updated listing of events on the homepage;
- Posting NIA and Foundation news and updates;
- Adding digital editions of *NIA News* issues to Members Only;
- Updating the Committee meeting minutes archive available on Members Only; and
- Adding new graphics and images to the homepage to highlight top stories.

[www.InsulationOutlook.com](http://www.InsulationOutlook.com)

Improvements to the site in 2015 included:

- Posting each month’s content in a visually appealing manner that is also easy to search;
- Including new graphics of the covers and a full listing of the articles in each issue;
- Updating content and the [Insulation Outlook article archive](#), including adopting a standardized heading style to give more consistency to articles;
- Updating the [2015 advertisers page](#) and advertising graphics for Premier 12 and 7 advertisers;
- Adding 2015 Media Kit with updated [editorial calendar](#); and
- Updating all pages to include the most current information.



[www.InsulateMetalBuildings.org](http://www.InsulateMetalBuildings.org)

This website is designed to provide up-to-date information on energy code compliance for pre-engineered metal building systems, the use of NIA Certified Faced Insulation® and metal building insulation assemblies, and proper installation that comply with ASHRAE 90.1 and state energy codes.

- In 2015, NIA’s Metal Building Laminators Committee asked for volunteers to review and give input on what needs to be updated when the website is overhauled in 2016.

## E-NEWS BULLETIN

The *E-News Bulletin* (ENB) is a free monthly e-newsletter that provides updates on NIA’s events, training courses, products, and mechanical insulation industry news. Anyone may subscribe by filling out a short form on [www.Insulation.org](http://www.Insulation.org). The subscriber list currently contains more than 4,570 email addresses.

In 2015, NIA communications staff:

- Curated content into 12 monthly ENBs that had been distributed in separate emails to provide tailored information in fewer emails through our email provider, Constant Contact;
- Created and deployed customized content about NIA announcements, press releases, and events in 31 graphically enhanced e-newsletters;
- Incorporated *Insulation Advocate* into the monthly ENB;
- Conducted member surveys on installing insulation products and website preferences;
- Added a calendar of NIA events and deadlines to the monthly ENB;
- Highlighted an MTL advertiser in each monthly ENB;

- Included video clips of NIA events, such as the ribbon-cutting ceremony at IEX USA, 60<sup>th</sup> Annual Convention congratulatory videos from members, Convention hotel tours, and more;
- Featured a NIA product in each monthly ENB; and
- Created a banner ad position so that NIA members can advertise in our emails or NIA can feature events or products.

## MTL PRODUCT CATALOG

In 2015, we implemented a marketing campaign to increase traffic to the online [MTL Product Catalog website](#). Ads were placed in *Insulation Outlook* magazine and the *E-News Bulletin* highlighting the resources on the MTL and a different manufacturer for each ad. Ads were also created and placed in various electronic and print communication pieces and highlighted on social media. These were geared toward end users and explained the benefits and information that could be found on the MTL. Staff has also added technical resources that are useful to end users and allowed manufacturers to post insulation product and installation videos.

PUBLICATIONS

NIA NEWS

NIA News is a print and digital newsletter that is produced 5 times per year and is available exclusively to NIA members free of charge as part of their membership dues. In 2015, it was distributed to over 1,700 NIA members per issue.

- For 4 of the 5 issues, NIA increased the page count from 12 to 16 pages, offering added photos and coverage of NIA events, programs, services, as well as industry and safety news.
- A new member-requested column, “Ask the Expert,” debuted in the June/July/August issue. As an ongoing member benefit, NIA seeks expert answers to questions from members—particularly smaller contractors—about human resources, personnel, legal, safety, and other business matters, such as OSHA Competent-Person Compliance, Globally Harmonized System of Classification and Labeling of Chemicals (GHS) standards, and industry recruitment.
- “Safety Corner,” a feature that debuted mid-year in 2014, in response to member need for safety updates, ran in all 5 issues, addressing critical safety updates, such as new OSHA updates and requirements.

In response to member inquiries, NIA published several FAQs and Question and Answer features on topics such as the Fall Summit; exhibiting at or attending IEX USA; and NIA’s Safety Award Program, the Theodore H. Brodie Distinguished Safety Awards.



60 YEARS OF INSULATION OUTLOOK MAGAZINE!

In 2015, *Insulation Outlook* celebrated 60 years! In acknowledgment of reaching this milestone, we debuted the new modernized redesign of *Insulation Outlook* in the March/April 2015 issue.

Eleven times a year, *Insulation Outlook* provides practical information about mechanical insulation’s value, uses, applications, and economic benefits to its audience of 11,550 subscribers in the construction industry. The magazine is a forum for NIA members to educate the construction industry about insulation. Topics and content are based on reader and member feedback and article submissions. Members receive this magazine as part of their membership dues.

Editorial

A wide variety of editorial topics were covered in 50 articles during 2015 in *Insulation Outlook* magazine. All the articles were uploaded to the articles database at [www.insulation.org/articles](http://www.insulation.org/articles) and to [www.InsulationOutlook.com](http://www.InsulationOutlook.com).

- In the October 2015 issue of *Insulation Outlook*, NIA premiered a new column: NIA Focus, which featured information about NIA’s events and activities. The column debuted in October because it was the issue present at the first-ever insulation trade show, IEX USA.
- NIA wrote and published a wrap-up article chronicling the success of the first IEX USA trade show.
- NIA wrote and published an article on the seriousness of worker shortages and shared NIA resources that could be helpful in a training capacity.
- NIA wrote and published an article on the benefits of working in the insulation industry. The article, titled, “Limitless Potential,” ran in the October 2015 issue of *Insulation Outlook* and may be adapted in the future as a recruitment tool for members.
- NIA’s special double issue usually features a section containing forecasts for the coming year. In 2015, we enhanced this feature by creating special sections for our various audiences. We labeled each section by industry—separating out and naming forecasts that would be interesting to architects, engineers, distributors, and the construction industry in general.
- All articles are published online approximately 1 month after the initial print publication. They can be found at [www.InsulationOutlook.com](http://www.InsulationOutlook.com) and are searchable by topic, author, and issue.

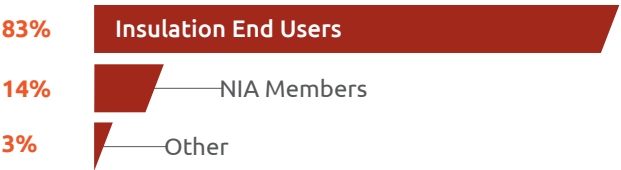
In addition, we added a recurring educational feature, “Understanding Thermal Systems,” to explain how insulation is used in different systems, which included the following 5 articles:

- “Commercial HVAC Duct Systems”
- “Hydronic Heating and Cooling Systems”
- “Steam Systems”
- “Basic Cooling Systems”
- “Industrial Refrigeration Systems”

Circulation

*Insulation Outlook* was sent to numerous industry-relevant trade shows and events, such as the 2015 NASEO/ASERTTI Energy Policy and Technology Outlook Conference, CSI Construct 2015, World Energy Engineering Conference (WEEC), GlobalCon 2015, West Coast Energy Management Congress, MetalCon International, NASEO’s Annual Meeting, RCI Building Envelope Technology Symposium, IEX USA show, Thermal Insulation Association of Canada’s (TIAC) annual conference, regional associations’ annual meetings, and the NIA’s Annual Convention and Fall Summit meetings.

*Insulation Outlook’s* circulation metrics at the end of 2015 were:



Advertising

*Insulation Outlook* offers individual ads as well as 3 advertising packages designed to reward frequent advertisers with extra exposure: Select 4, Preferred 7, and Premier 12. Descriptions of the package benefits can be found at [www.insulationoutlook.com/io/advertise.cfm](http://www.insulationoutlook.com/io/advertise.cfm).

The March/April and October 2015 issues of *Insulation Outlook* featured a Product Spotlight. Advertisers of *Insulation Outlook* were given the opportunity to showcase their products in the magazine. Each spotlight included company name, a product image, description, and contact information.

WHAT SUBSCRIBERS ARE SAYING

For over 60 years, NIA has published *Insulation Outlook*, and we are proudly committed to continue making it the very best and only resource dedicated to the commercial and industrial insulation industry. Our loyal subscribers agree. Here is a small sample of the positive feedback we received in 2015 on the quality editorial content in each issue.

Insulation Outlook is:

- *“extremely helpful to find products and items to help insulate various shaped custom designs that are here at NASA Kennedy Space Center.”*
- *“‘required’ reading for our PMs and Estimators. As we hire younger guys into the industry with little or no experience, Outlook is a helpful tool in increasing their knowledge in our specialty industry and in the long run helps our company be considered a professional.”*
- *“the overall # 1 insulation magazine that I read for new products. Most important is all the industrial information that I have gained from reading Outlook. I also. . . send copies to my industrial customers.”*
- *“awesome! I find something helpful every month.”*
- *“like having a one stop shop for insulation knowledge and products.”*
- *“well researched and written and provides very helpful information condensed enough for me to benefit without having to spend excess time reading. I commend you.”*
- *“is definitely the go to magazine with respect to building system insulation products, methods, issues, and solutions.”*
- *“incredibly helpful. We are a consulting engineering firm, and specifying insulation properly, and not getting a poor quality job is a big concern. And something they don’t teach in engineering school.”*



# FOUNDATION FOR EDUCATION, TRAINING, AND INDUSTRY ADVANCEMENT

Now in its eighteenth year, NIA’s Foundation for Education, Training, and Industry Advancement continued its work to uphold its role of promoting the commercial and industrial insulation industry to thousands of end users, specifiers, architects, energy managers, plant operators, building owners, facility managers, government agencies, and strategically aligned partners.

The Foundation is funded primarily through voluntary contributions and these funds are strictly used for Foundation related initiatives and projects. Foundation programs and activities are determined by the Foundation Steering Committee and approved by the NIA Board of Directors. Our progress in the areas of legislation, strategic partner collaborations, outreach, education, communications, and training in 2015 was made possible through generous contributions from the following member companies and industry organizations:

**Gold-Elite (\$15,000 voluntary annual contribution)**

- Johns Manville Corporation
- Knauf Insulation, Inc.
- Owens Corning
- Performance Contracting, Inc.
- Pittsburgh Corning
- Roxul Technical Insulation
- Winroc-SPI

**Gold-Plus (\$10,000 voluntary annual contribution)**

- E. J. Bartells
- Industrial Insulation Group

**Gold (\$5,000 voluntary annual contribution)**

- Alpha Associates, Inc.
- Armacell
- Bay Industries, Inc.
- Delaware Valley Insulation and Abatement Contractors Association, Inc.
- Distribution International, Inc.
- Eastern States Insulation Contractors Association
- Insulation Contractors Association of New York City
- Insulation Materials Corp.
- Irex Contracting Group
- Lamtec Corp.
- Selle Insulation Co./PBI Supply
- Thermal Insulation Association of Canada

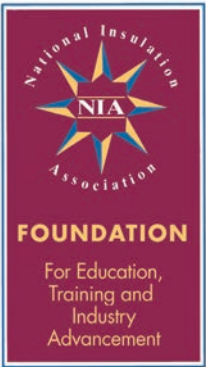
**Silver**

**(\$3,000 voluntary annual contribution)**

- Aeroflex USA, Inc.
- Dyplast Products, LLC
- Integrated Marketing Group
- ITW Insulation Systems
- K-FLEX USA, LLC
- Luse Thermal Technologies
- Manson Insulation
- Midwest Insulation Contractors Association
- R.P.R. Products, Inc.

**Bronze (\$1,000 voluntary annual contribution)**

- Allied Insulation Supply
- Breeding Insulation Co., Chattanooga, Inc.
- Caudle-Hyatt, Inc.
- Central States Insulation Association
- CertainTeed Corp.
- Crossroads C&I Distributors, Inc.
- DKB, Inc.
- Farwest Insulation Contracting
- General Coating & Insulation Services, Ltd.
- Geo. V. Hamilton, Inc.
- Heat Frost and Thermal Insulation Education Fund
- Hudson Bay Insulation Co.
- Illinois Regional Insulation Contractors Association, Inc.
- Insulation Fabricators, Inc.
- L & C Insulation, Inc.
- Master Insulators Association of Evansville, Indiana
- Nomaco Insulation
- Pacor, Inc.
- Petrin Corp.
- Scandvic Enterprises, Inc.
- Shook & Fletcher Insulation Co.
- Southeastern Insulation Contractors Association
- Southwest Insulation Contractors Association
- Western Insulation Contractors Association



## EDUCATIONAL WEBINARS

### Health and Safety Webinar Series

NIA offered a 2-part webinar series designed to help members learn about OSHA’s updates on injury reporting and record-keeping requirements, and how to address distractions at the worksite. Part I: “OSHA Update: Injury Reporting and Record-Keeping Requirements” took place on December 9, 2014. Part II: “Distracted Driving and Other Workplace Distractions” took place on January 29, 2015.

### Leadership Webinar Series

In 2015, NIA developed an educational webinar series focused on leadership training, a topic that members expressed as being of importance to their businesses and employees. Hosted by the FMI Corporation, a leader in training and development in the Construction Industry, the following webinars were offered:

- Part I: “Position Your Company for Success: Prepare Now for the Top 10 Construction Industry Trends through 2020” took place on January 27, 2016.

**Speaker: Mark F. (Rusty) Sherwood, Principal, FMI Center for Strategic Leadership**

- Part II: “Essentials for Leadership Recruitment and Transition Planning” took place on February 24, 2016.

**Speakers: Paige S. Kelly, Consultant, FMI Corporation and Edward K. Rowell, Consultant, FMI Corporation**

Archives of the 60-minute webinars are available for those who were unable to participate in the live webinars.

## HIGHLIGHTS FROM OUR CAPITOL HILL LEGISLATIVE STRATEGIES, ACTIONS, AND INITIATIVES January/February 2015

- The Thermal Insulation Efficiency Improvement Act, a bill that directs the Secretary of the Department of Energy (DOE) to prepare a report on the impact of thermal insulation on both energy and water use for potable hot water was re-introduced (H.R.568) once again by Congressmen Adam Kinzinger (R-IL) and Jerry McNerney (D-CA).
- Along with our lobbying firm, The Keelen Group, NIA worked with the offices of Senators Rob Portman (R-OH) and Jeanne Shaheen (D-NH) to include our language from H.R.568 in their comprehensive government and industry energy efficiency package, the Energy Savings and Industrial Competitiveness Act (H.R.8).

### April 2015

- Worked with the Energy and Commerce Committee staff to have our language from H.R.568 included in the committee’s energy draft legislation. In addition, our language was highlighted by Energy and Power Chairman Ed Whitfield (R-KY) during a committee hearing on April 30.
- Drafted and submitted a Statement for the Record for a Senate Energy and Natural Resources Committee, chaired by Senator





Lisa Murkowski (R-AK), requesting that our language from H.R.568 be included in the Senate version of energy efficiency legislation.

June/July 2015

- The House of Representatives Subcommittee on Energy and Power advanced its version of a comprehensive energy package and NIA’s language related to getting a report on the impact of thermal insulation on both energy and water use when examining potable hot water use in federal buildings is included in the package as Sec. #4113—Report on Energy and Water Savings Potential from Thermal Insulation.
- The Senate Energy and Natural Resources Committee passed a version of the energy package. Rather than just including our language in this bill, both the Chairwoman, Senator Lisa Murkowski (R-AK) and the Ranking members of the committee, expressed their strong support for our language and their desire to write a letter to the DOE to urge it to act now and conduct the study under its current authority instead of waiting for the bill to pass.

September 2015

- The House Committee on Energy and Commerce held a full committee mark-up of H.R.8, the North American Energy Security and Infrastructure Act, which included NIA’s language mandating the DOE to conduct a study on the impact that thermal insulation can have on water and energy costs in federal buildings. A study of this nature could be used as further proof of insulation’s benefits, and might lead to more insulation being specified in federal buildings as the tremendous energy savings of insulation become apparent. The results of this study could also be used to make the case for increased insulation in other commercial and industrial facilities. This bill passed the committee via vote.

November 2015

- As a follow up to the July 2015 Senate Energy and Natural Resources committee meeting, and as a result of NIA’s work with the committee, Senator Lisa Murkowski (R-AK) (committee Chairwoman) and Senator Maria Cantwell (D-WA) (ranking member), wrote and sent a bipartisan letter to Energy Secretary Ernest Moniz requesting a study on the impact of thermal insulation on water and energy use within federal buildings and facilities. The letter read, in part, *“Among the most cost-effective and available energy efficiency technologies is thermal insulation. We recognize the general benefits that thermal insulation can have in the industrial and commercial sectors when it is installed on ductwork, steam piping, hot and cold water piping, mechanical systems, and other equipment and facilities. However, to encourage greater use of this technology, it would be helpful to have experts within the Department of Energy analyze and report on the specific benefits thermal insulation presents. Accordingly, we request that you conduct a study on the impact that thermal insulation can have on energy and water use within federal buildings and facilities.”* The committee announced, via press release, that the letter had been officially sent to the DOE, and also cited NIA’s prior research supporting the increased use of insulation.

December 2015

- The House of Representatives passed H.R.8, the North American Energy Security and Infrastructure Act of 2015. This bill included NIA’s language, which mandates that the DOE conduct a study on the impact that thermal insulation can have when examining water and energy costs in federal buildings. A study of this nature could be used as further proof of insulation’s benefits, and might lead



- to more insulation being specified in federal buildings as the tremendous energy savings of insulation become apparent.
- The Mechanical Insulation Installation Incentive Act of 2015 was introduced in the House of Representatives by Representative Bob Dold (R-IL) and cosponsored by Representative Linda Sanchez (D-CA) on December 3. Representative Tammy Duckworth (D-IL) also later joined to cosponsor this bill on December 17. While this is not NIA’s bill, we are encouraged to see that there is support for creating a tax incentive for the use of mechanical insulation, and will work in 2016 to see if we can make progress on this front.

STRATEGIC PARTNERSHIPS AND COLLABORATIONS

In 2015, NIA engaged in the following activities to support mechanical insulation initiatives and advocacy:

- Worked with the Alliance to Save Energy on a newly created Energy-Water Nexus Subcommittee. The energy-water nexus refers to the efficiency issues surrounding energy and water, since water is often used in the production of energy. Mechanical insulation has tremendous potential in this area, since it can significantly reduce energy usage and optimize performance, thus saving both resources. The subcommittee is making the promotion of mechanical insulation one of their top priorities.
- Partnered with ASHRAE and other organizations in signing a letter encouraging the U.S. Senate Appropriations Committee to support the inclusion of positive building energy codes language in a report for the Energy and Water Development and Related Agencies Appropriations Act for FY16.
- Joined approximately 30 organizations in signing a letter penned by the Alliance to Save Energy; this letter requested that the Energy and Commerce Committee remove the building energy codes language from the Committee’s

energy bill “Discussion Draft.” These provisions would prevent the DOE from providing any assistance—either technical or financial—if it finds that a proposed code does not meet a simple payback period of 10 years or less. This single country-wide payback model does not consider the significant variations that occur in different regions of the country due to individual market pressures and climate, and we believe it would cause significant setbacks to the current method of establishing building energy codes. NIA was proud to represent the interests of our membership by joining this coalition of signees and voicing our strong disapproval for any legislation that is not in the best interests of our industry or our country.

- Attended the Energy Service Coalition (ESC) Market Transformation Conference, which focused on energy service performance contracts (ESPCs). ESPCs allow federal agencies to procure energy savings and facility improvements with no up-front capital costs or special appropriations from Congress. As NIA was working to determine if there was value for NIA members to collaborate with ESCOs, this meeting provided more information on the topic.
- Attended congressional briefings on increasing energy productivity in existing buildings.

NIA maintained a strong list of 15 strategic industry partners:

- [The American Institute of Architects \(AIA\)](#)
- [American Society of Heating, Refrigerating, and Air-Conditioning Engineers \(ASHRAE\)](#)
- [American Society of Mechanical Engineers \(ASME\)](#)
- [The Association of Energy Engineers \(AEE\)](#)
- [Association for Facilities Engineering \(AFE\)](#)



- The Construction Specifications Institute (CSI)
- Department of Energy (DOE)
- Energy Future Coalition (Rebuilding America Coalition)
- Industrial District Energy Association (IDEA)
- Mechanical Contractors Association of America (MCAA)
- National Association of State Energy Officials (NASEO)
- National Institute of Building Sciences (NIBS)
- Plumbing-Heating-Cooling Contractors Association (PHCC)
- Refrigerating Engineers & Technicians Association (RETA)
- Technical Association for the Pulp & Paper Industry (TAPPI)

2013-2014 INDUSTRY MEASUREMENT SURVEY

Every 2 years, NIA’s Foundation conducts a survey to gauge the size of the insulation industry. This survey began in 1997 and sought to gain data about the size of the insulation industry and growth rates for the U.S. commercial and industrial mechanical insulation market. The NIA members who participated in the survey provided information to an independent, third-party company. The company took that information and applied a formula created by NIA to extrapolate the annual size of the insulation industry in the United States.

It was conducted in the first quarter of 2015 to determine industry growth from 2012 through 2014 and to obtain an indication of growth for 2015 and 2016. The survey results indicated the market had grown from \$9.3 billion in 2012 to \$10.1 billion in 2013, a 15.7% growth over 2012; to \$10.7 billion in 2014, a 5.6% increase over 2013; and \$11.4 billion in 2015, a 5.6% increase over 2014. The industry is forecasted to reach \$12.3 billion in 2016, an increase of 7.0% over 2015.

The growth is not uniform across market segments, the country, by region, state, or even within states. Figure 1 exhibits

the trend over the last 18 years (1997 through 2014) and the forecasted growth for 2015 and 2016.

The survey indicated gross margin improvement in the distribution and contractor channels, which is welcome news after a decline over the previous 2 years. With margin increases in those channels, it is a good assumption that the manufacturing segment also experienced a margin increase. Overall, between 20–25% of the 2013 and 2014 growth is attributed to margin increases.

Figure 2 illustrates the growth percentage in the industry year to year. 2005 marked a high, with a 22.9% growth rate, with 2009 marking a low of -27.7%. Annual fluctuations are to be expected and are caused mainly by changes in the overall economy. It is important to note the compounded annual growth rate, which refers to industry growth over the entire 18-year period, is 6.6%.

Growth was expected in both units and dollars (price increases). On average, 75–80% of the growth forecast was derived from unit growth, which illustrates either core industry growth or simply an increased demand for products and services.

The survey also exhibited a higher ratio of accessory materials in comparison to primary core insulation materials. It is believed this indicates an increase in the use of laminate and other types of finishing systems versus traditional approaches. It may also indicate the growth in the industrial and/or below-ambient market segments was greater than the commercial building market.

To read the full results, visit <http://ow.ly/YLmid>.

LAMINATED METAL BUILDING INSULATION SURVEY RESULTS

Laminated metal building insulation was previously excluded from the Industry Measurement Survey because it could not be applied to the survey methodology utilized for mechanical insulation.

With the help of several metal building laminators, an approach and methodology for laminated metal building insulation was developed. The goal of this survey was to provide valuable data regarding market size and growth rates for the United States’ laminated metal building insulation market.

Again, the NIA members who participated in the survey in early 2015 provided information to an independent, third-party company that applied a formula created by NIA to extrapolate the annual size of the laminated metal building insulation industry in the United States and its growth from 2012 through 2014, and to obtain an indication of growth for 2015 and 2016. As shown in Figure 3, the U.S. laminated metal building insulation market is growing and exceeded \$249 million in 2014 (a 13.7% increase over 2013). The market is forecast to reach \$275 million in 2015 (a 10.4% increase over 2014), and \$304 million in 2016 (a 10.6% increase over 2015).

Survey Definition

The survey included the following general definition for laminated metal building insulation products: all fiber glass insulation products and jacketing products sold by manufacturers for use in developing (fabricating/laminating) laminated metal building insulation systems. Using informal survey methods, the following were added to develop the final survey results: lamination accessory materials (adhesives, packaging, etc.), laminating labor, laminator margin, and delivery costs. The intent was for the survey to represent only laminated metal building insulation, but the methodology employed may have captured some allowance for liner-type products.

It is important to note that survey responses in regard to 2015 and 2016 forecasts varied from 6% growth to over 15%. Overall

growth was expected in both units and dollars (price increases). On average, approximately 50% was from unit growth, which illustrates core industry growth or increased demand for products and services.

Conclusion

The 2015 and 2016 forecasts seem to be reasonably in line with the overall commercial construction market forecast. The forecast does not break out growth expectations between new construction, retrofits, or maintenance applications. Historically, a forecast of this nature includes a blend of each, with new construction being the largest percentage. Regardless, the growth forecasts are welcome news. To read the full results, visit <http://ow.ly/YLmld>.

FOUNDATION COMMUNICATIONS TO MEMBERS



In 2015, NIA kept members informed about its Foundation activities by:

- Publishing 9 editions of NIA’s *Insulation Advocate* e-news-letter which is posted on the homepage and emailed in the *E-News Bulletin*;
- Including articles in 3 issues of *NIA News*;
- Publishing 2 articles in *Insulation Outlook* magazine;
- Hosting a Foundation update at NIA’s 60<sup>th</sup> Annual Convention and providing Foundation contributors with supporting materials to accompany the presentation;
- Updating the regional insulation associations and Thermal Insulation Association of Canada (TIAC) on NIA activities during their annual meetings; and
- Posting updates on **Facebook** and **Twitter**.

Figure 1

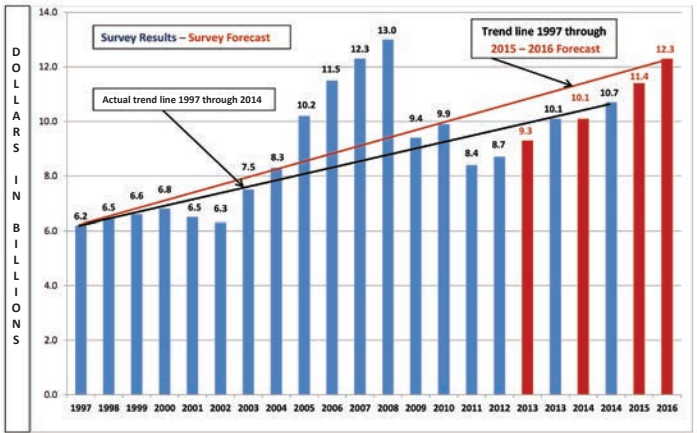


Figure 2

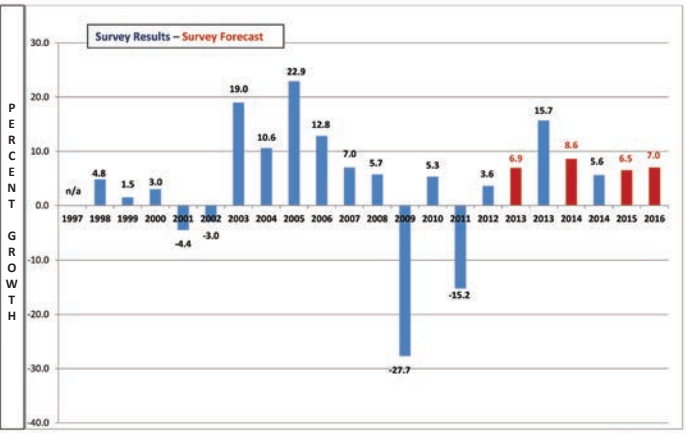
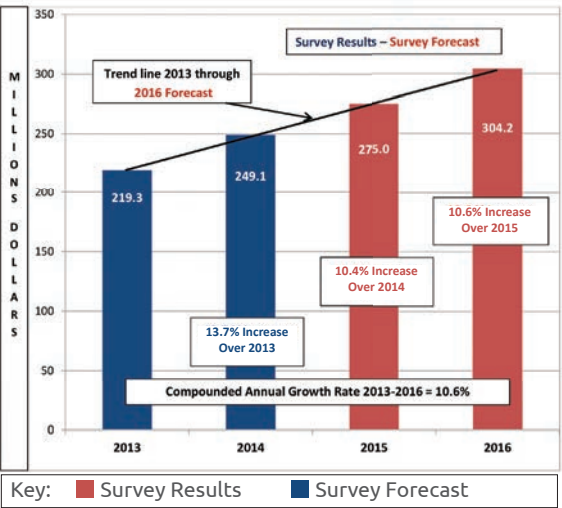


Figure 3



# TRAINING AND EDUCATION



NIA offered the following training programs to members and organizations in 2015: the **Insulation Energy Appraisal Program (IEAP)**, **NIA's Health and Safety Webinar Series**, and **NIA's Leadership Webinar Series** in 2016.

## IEAP

This 2-day accredited class teaches students how to review mechanical system specifics and use the 3E Plus® Version 4.1 software to determine the optimal insulation thickness and corresponding energy and dollar savings for a project. Students who attend the course and pass the exam become Certified Insulation Energy Appraisers. **All current NIA-member certified appraisers are listed on NIA's website.**

## Update on the IEAP Course Revision

- NIA worked with industry consultants Ron King (NIA Past President and Consultant) and Chris Crall, P.E., CCrall Consulting, LLC, to review the IEAP course curriculum and exam. The materials were updated to include additional content on conducting energy audits, utilizing heat-sensitive infrared cameras during inspections, understanding steam efficiencies, and applying more real-world application examples and practices relating to the 3E Plus insulation

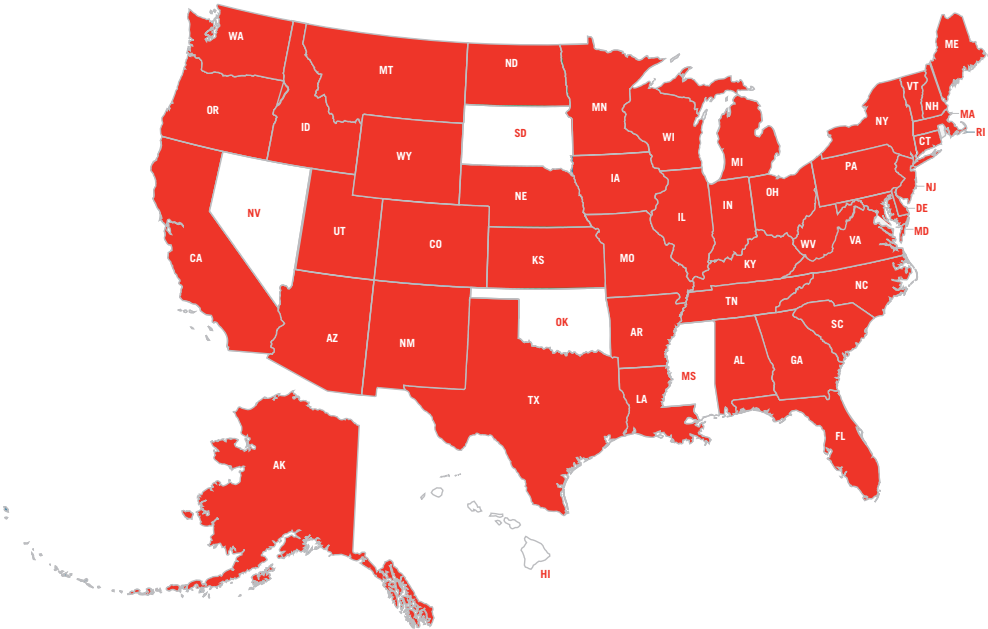
thickness software. The exam questions were also reviewed and updated to include the new material.

- The first updated course, held May 20–21, 2015 in Baltimore, Maryland, was sold out with a total of 29 students. A member of NIA's Technical Information Committee (TIC) audited the course and provided feedback and suggested improvements. These suggestions were implemented and are now included as part of the IEAP course materials.
- NIA partnered with a new testing center in 2015, PROV. PROV offers more flexibility with proctoring exams, quicker turnaround time for exam results and grades, and exam analytics.
- NIA has created a new auditing process to review technical content annually through the TIC.

In 2015, NIA saw continued interest in training programs:

- NIA held 2 IEAP courses, certifying 48 new appraisers.
- NIA held 1 sponsored IEAP course, certifying 11 new appraisers.
- There were 448 Certified Insulation Energy Appraisers as of December 31, 2015.

## STATES WITH CERTIFIED INSULATION ENERGY APPRAISERS



We also have appraisers in the following countries:

Brazil, Canada, Columbia, Mexico, Netherlands, and Trinidad and Tobago

# MEETINGS

## NIA'S 60<sup>TH</sup> ANNUAL CONVENTION

**JW Marriott San Antonio Hill Country Resort & Spa**  
**San Antonio, Texas**  
**March 25–28, 2015**

In March, NIA held its 60<sup>th</sup> Annual Convention in San Antonio, Texas, with the theme "Amazing Results Driven by Vision." NIA members and guests came together to gain industry knowledge from educational sessions and committee meetings, and connect with business partners and colleagues at multiple networking events, including the NIA Member Orientation; VIP/First-Timers Reception; Welcome Reception; Appreciation Night; Manufacturers' Dessert Hospitality Suites; Golf Tournament; and the President's Dinner and Dance. Unique to this

year's event was the Valero Texas Open that took place at the hotel, and Convention attendees enjoyed complimentary access to the golf tournament. The Convention had 408 attendees, 40 of which were first-time attendees. The 127 Active Members participating included 60 Contractors, 35 Distributors, 10 Fabricators, 19 Laminators, and 3 holding company representatives. There were 109 manufacturers/consultants, 130 spouses and guests, 14 TIAC members, 1 international affiliate, 18 Past Presidents, and 9 others, including speakers and industry guests. There were a total of 121 companies registered.







Past Presidents that attended Convention included:

- W. Paul Stonebraker (1988)
- Ronald King (1989)
- Danny K. Osborn (1990)
- Duane C. Luse (1992)
- Duke Hales (1993)
- Thomas Burcham (1994)
- Chip Hough (1996)
- P. Thomas Fraatz (1997)
- Roma Farnsworth, in honor of Harold Farnsworth (2000)
- Onza Hyatt (2001)
- H. Vaughan Privett (2004)
- Peter Gauchel (2007)
- Charles Schattgen (2009)
- Larry Nelles (2010)
- Glenn Frye (2011)
- Alec Rexroat (2012)
- Rick Smith (2013)
- David Dzina (2014–2015)



CELEBRATING 60 YEARS!

Prior to Convention, NIA invited members to record a short video to share their NIA experiences. Four videos featuring 5 members were sent in and shared on NIA’s social media and YouTube channel and in the *E-News Bulletin*. NIA celebrated the special milestone by giving all attendees personalized NIA champagne splits. A total of 18 Past Presidents attended the Convention, and a few special elements and events were added to honor them. Events celebrating the Past Presidents included:

- A Parade of Leaders during the opening General Session—with a special anniversary cake;
- A champagne toast at the President’s Dinner and Dance that honored the Past Presidents for their dedication and service to the industry;
- A video showing the reflections from the Past Presidents was created and played at the President’s Dinner and Dance. Twelve of NIA’s Past President’s shared brief reflections on leading NIA, Annual Conventions, and the mechanical insulation industry. This video is now posted on **NIA’s YouTube channel**. Quotes from the video have been used in member publications to share their insights. In addition, a Past President who could not attend Convention recorded a separate video, which was shared on NIA’s YouTube channel and social media;
- New banners celebrating our presidential history, with each Past President’s photo and term, were created and displayed at Convention;
- These photos were added to the Mobile Meeting App; and
- By member request, staff created a private Facebook group for Past Presidents to keep in touch beyond Convention.

General Sessions presented at the Annual Convention included:

- “Seeing Past Today” by Keynote Speaker Jim Morris;
- “Attracting and Retaining the Construction Workforce” by Tim Johnson, Founder and CEO, the TJC Group;
- “Foundation Update,” by Matt Keelen, Founder and President, The Keelen Group; and
- “Restoring American Prosperity—Fixing Our National Debt” by Paul Stebbins, Former CEO & Chairman Emeritus, World Fuel Services Corporation.

Roundtable Sessions presented at the Annual Convention included:

- “Decoding GHS” by Jim Dennison, Senior Market Manager, HB Fuller Construction Products;
- “Cybersecurity Solutions: Protecting Your Business Systems and Data” by Stacia Bedford, IT Management Consultant, Hewlett Packard (HP); and
- “Safety Best Practices” by Gary Auman, NIA’s General Counsel and National OSHA Defense Attorney, Dunlevey, Mahan and Furry, and Ed Loosemore, Manager, Corporate Safety, Performance Contracting Group. Winners of the 2014 Theodore H. Brodie Distinguished Safety Award also shared best practices and discussed how to implement successful safety programs.

The Technical Presentations focused on “Insulation Design in LNG and Cryogenic Applications.” Individual topics included:

- “Cellular Glass Insulation for LNG Piping” by Allen Dickey, Product Manager of Pipe and Equipment Insulation Systems, Pittsburgh Corning;
- “Flexible Aerogel Blanket Material for Cryogenic Applications” by John Williams, Vice President, Marketing and Technical Services, Aspen Aerogels;
- “Key Benefits of FEF Insulation Systems for LNG Facilities” by Mike Resetar, Technical Manager, Mechanical/Technical Insulation, Armacell; and
- “Polyisocyanurate Based Insulation Systems for Liquid Natural Gas (LNG) Piping” by Jim Young, Technical Director, ITW Insulation Systems.

CONVENTION SPONSORS

NIA extends a special thank you to sponsors, who contributed to the success of NIA’s Annual Convention. NIA appreciates your continued support!

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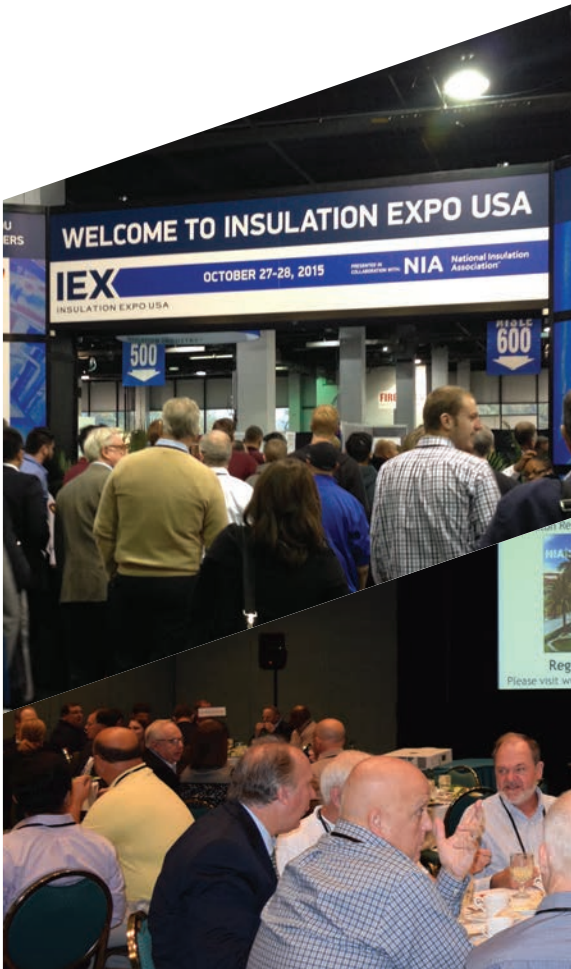




**FALL SUMMIT 2015:**  
**NEW NAME, NEW FORMAT, MORE VALUE**  
**Donald E. Stephens Convention Center**  
**Rosemont, Illinois**  
**October 26–28, 2015**

In 2015, NIA redesigned and renamed its fall member meeting to NIA’s Fall Summit (formerly Committee Days). The rebranding included a new meeting format, tagline, and logo. The 2015 Fall Summit was held in conjunction with Reed Exhibitions’ inaugural trade show, Insulation Expo (IEX) USA, and its schedule was designed to maximize the value of our members’ time out of the office. The majority of the Fall Summit meetings and educational sessions took place in the morning, allowing attendees the opportunity to attend or participate in a booth at the IEX USA trade show in the afternoon. An effort was also made to highlight open committee meetings, and convey to members that they did not have to be a current or past committee member to participate. Committee meetings and forums featured speakers, which further increased the value of committee participation.

**NIA’s Fall Summit had a record-breaking number of attendees—200 members from almost 100 companies.** Of the 200 attendees, 108 were first-time fall meeting participants, and of those, 68 members were attending their first NIA event.



**New or updated Fall Summit features included:**

- Two bonus educational training sessions on Monday afternoon;
- Five additional expert speakers on member-requested topics in forum-style committee meetings;
- A breakfast and luncheon General Session speaker;
- NIA & IEX Oktoberfest Reception;
- Complimentary access to IEX USA trade show floor;
- Multiperson attendee registration discounts;
- Holding an IEAP Training Course directly after NIA’s Fall Summit meeting; and
- Offering discounted registration to members who attended both the Fall Summit and IEAP class.



**Educational Sessions presented at the Fall Summit included:**

- “Connecting the Dots Between Federal and State Energy-Efficiency Programs” by David Terry, Executive Director, National Association of State Energy Officials, and Mark Milby, Program Manager, Midwest Energy Efficiency Alliance;
- “Creating a Culture of Safety: A Panel Discussion with a Q&A” facilitated by Gary Auman, Attorney, Dunlevey, Mahan & Furry. Panelists included: Pete Gauchel, President/CEO, L & C Insulation, Inc.; Jason Heath, Director of Safety & Loss Control, Zampell Companies; and Ed Loosemore, Manager, Corporate Safety, Performance Contracting, Inc.;
- “Industrial Market Outlook for 2016” by Brock Ramey, Power Specialist, Industrial Info Resources;
- “Optimizing the Insulation Energy Appraisal Program for Your Business” by Chris Crall, P.E., CCrall Consulting;
- “Recruiting and Retaining Top Talent” by Kathryn Newton, MBA, PH.D., Associate Dean for Graduate Programs, Purdue University;
- “Risk Management for the Successful Contractor” by Lewis LaClair, President, Advanced Risk Management Corp.;
- “Understanding Multiemployer Defined Benefit Plans” by Phillip Romello, Senior Vice President and Actuary, Segal Consulting; and
- “Utilizing Infrared Technology in Your Business-Development Model” by Jay Bowen, Thermography Instructor, Infrared Training Center.

**INSULATION EXPO (IEX) USA**  
**Donald E. Stephens Convention Center**  
**Rosemont, Illinois**  
**October 27–28, 2015**

NIA collaborated with Reed Exhibitions to organize the first North American trade show for the commercial and industrial mechanical insulation markets: Insulation Expo (IEX) USA. NIA’s Fall Summit was held in conjunction with IEX USA, allowing attendees the opportunity to reach the engineer and end-user audience. Out of the 75 exhibitors at the show, 41 were NIA member companies. NIA member exhibitors received discounted pricing and 2 complimentary passes to attend NIA’s Fall Summit event as part of their booth package. IEX USA is a biennial event, and the next show will take place in 2017.

**NIA member companies that exhibited at the inaugural IEX USA included:**

Aeroflex USA, Inc.; Alpha Associates, Inc.; Armacell; Atlanta Fiberglass, USA (AFG, USA); Auburn Manufacturing, Inc.; Bay Insulation Systems, Inc.; CertainTeed Corp.; Corick Valve Covers, Inc.; Damon Insulation Co., Inc.; Distribution International, Inc.; DUNA-USA; Duraflex, Inc.; Dyplast Products, LLC; Extol of Ohio, Inc.; General Insulation Co., Inc.; GLT Products and Speedline Corp.; Ideal Products of America, LP; Irex Contracting Group; ITW Insulation Systems; Johns Manville; K-FLEX USA, LLC; Lamtec Corp.; Lewco Specialty Products, Inc.; Luse Thermal Technologies; MC&I, Inc. - RIDGLOK® Panel Systems; Midwest Fasteners, Inc.; Morgan Advanced Materials Thermal Ceramics; New Fire Co., Ltd.; Ningbo Firewheel Thermal Insulation & Sealing, Co., Ltd.; No Sweat Valve Wraps, Inc.; Owens Corning; PermaTherm, Inc.; Polyguard Products, Inc.; Price Manufacturing Corp.; Promat, Inc.; Rock Wool







NIA member companies that exhibited at the inaugural IEX USA (continued)

Manufacturing Co.; Roxul Technical Insulation; Safway Services, LLC; Ulbrich of Illinois; Unifrax I, LLC; and Winroc-SPI.

Attendee and exhibitor benefits included:

- The opportunity to network with engineers, contractors, facility operators, specifiers, architects, and suppliers of insulation products and services;
- The Learning Theatre, which hosted valuable content and demonstrations from leading experts in the insulation industry. NIA members presented on the following topics:
  - “ArmWin Insulation Calculator Tool” by Armacell;
  - “Essential Strategies for Specifying Insulation for VRF/VRV Systems” by Armacell;
  - “Fire Protection of Commerical Air Distribution Systems” by Unifrax Corp.;
  - “Microporous Insulation to ASTM Requirements” by Promat Inc.;
  - “Two-Piece Fitting Covers” by Price Manufacturing Corp.; and
  - “RIDGLOK Vertical Standing Seam Panel Insulation System” by MC&I, Inc. - RIDGLOK® Panel Systems.
- The Product Showcase, which featured new products and services from exhibitor companies; and
- The NIA and IEX Oktoberfest Reception.

NIA’s Booth at IEX USA

NIA hosted a booth on the trade show floor where attendees learned more about insulation, NIA’s Foundation, *Insulation Outlook* magazine, meetings and events, and educational resources. The booth offered attendees a place to relax, charge a phone, grab a morning cup of coffee or an afternoon snack or beer, and pick up a free industry themed t-shirt. NIA also held a raffle and one lucky member walked away with a free 40” smart TV.



The photos above are from NIA’s Fall Summit and NIA’s booth at IEX USA.

AWARDS

NIA MEMBERS WIN THE 2014 THEODORE H. BRODIE DISTINGUISHED SAFETY AWARDS

The **Theodore H. Brodie Distinguished Safety Award** is NIA’s highest industry honor and the only national award for outstanding safety performance in the mechanical insulation industry. The judging panel of expert safety professionals includes Health and Safety Committee leadership and NIA’s General Counsel and Occupational Safety and Health Administration (OSHA) Expert Gary Auman of Dunlevey, Mahan & Furry. All applicant companies receive an individualized and detailed STAR (Safety Training Analysis Results) Report, which is based on each applicant’s responses to application questions.

For the 2014 Safety Award, the number of Platinum winners doubled over the previous year and there were a record number of Associate member participants. The winners were announced at NIA’s 60<sup>th</sup> Annual Convention in San Antonio, Texas, on March 26, 2015.

Contractors

Platinum Winners:

- Advanced Industrial Services, LLC, *Walbridge, OH*  
Advanced Specialty Contractors, LLC, *Aston, PA*  
API, Inc., *Saint Paul, MN*  
Atlantic Contracting & Specialties, LLC, *Yonkers, NY*  
Cornerstone Services Group, LLC, *Kansas City, MO*  
Gribbins Insulation Company, Inc., *Evansville, IN*  
hth Companies, Inc., *Union, MO*  
Iowa Illinois Taylor Insulation Company, *Davenport, IA*  
I-Star Energy Solutions, *Lancaster, PA*  
Luse Thermal Technologies, *Aurora, IL*  
New States Contracting, LLC, *Sayreville, NJ*  
Performance Contracting, Inc., *Lenexa, KS*  
Summit Contracting, LLC, *Salt Lake City, UT*  
Zampell Companies, *Newburyport, MA*

Gold Winners:

- B.C. Flynn Contracting Corporation, *Congers, NY*  
Brand Energy & Infrastructure Services, *Kennesaw, GA*  
DKB, Inc., *Pasco, WA*  
Farwest Insulation Contracting, *Anaheim, CA*  
Geo. V. Hamilton, Inc., *McKees Rocks, PA*  
Hudson Bay Insulation Company, *Seattle, WA*  
Industrial Construction & Engineering, *Saint Peters, MO*  
Petrin Corporation, *Port Allen, LA*  
Thermal Solutions—Ohio, Inc., *Proctorville, OH*

Silver Winners: (No Silver winners in 2014.)

Bronze Winners:

- ABMECH, Inc., *W. Homestead, PA*  
Kirby-Vass Insulation, *Roanoke, VA*  
Marquis Construction Services, *Clute, TX*

Platinum Winners Present During Award Ceremony







Gold Winners Present During Award Ceremony



Silver Winner Present During Award Ceremony



Bronze Winners Present During Award Ceremony

Distributors/Fabricators

Platinum Winners:

- E.J. Bartells, *Renton, WA*
- PBI Supply, Inc., *Lubbock, TX*
- Selle Supply Company, *Lubbock, TX*

Gold Winners:

- Pacor, Inc., *Bordentown, NJ*
- Winroc-SPI, *Lancaster, PA*

Silver Winners: (No Silver winners in 2014.)

Bronze Winners:

- Distribution International, Inc., *Houston, TX*
- Insulation Fabricators, Inc., *Hammond, IN*

Associates (Manufacturers)

Platinum Winners:

- Dyplast Products, LLC, *Miami, FL*
- ITW Insulation Systems, *Houston, TX*

Gold Winners:

- Armacell, *Mebane, NC*
- Armacell (Atlanta location), *Atlanta, GA*
- Pittsburgh Corning, *Pittsburgh, PA*
- Roxul Technical Insulation, *Milton, Ontario, Canada*

Silver Winners:

- Industrial Insulation Group, *Brunswick, GA*

Bronze Winners:

- CertainTeed Corporation, *Valley Forge, PA*
- Proto Corporation, *Clearwater, FL*



NIA WINS MESOTHELIOMA FUNDRAISING AWARD

In 2015, NIA was proud to receive the 2014 Fundraising Award from the Mesothelioma Applied Research (Meso) Foundation in recognition of its contribution to their organization. Proceeds from NIA’s 2014 Silent Auction at the 59<sup>th</sup> Annual Convention in Indian Wells, California, were split between Meso and NIA’s Foundation. Funds received by the Meso Foundation help support patient programs, research, advocacy, and many other areas.

NIA FINANCIALS 2014–2015

Revenue

Membership & Association Meetings	731,456.00
Convention & Educational Programs	589,603.00
Publications & Communications	771,349.00
Net Investment Income	(22,824.00)
	<b>2,069,584.00</b>

Expenses

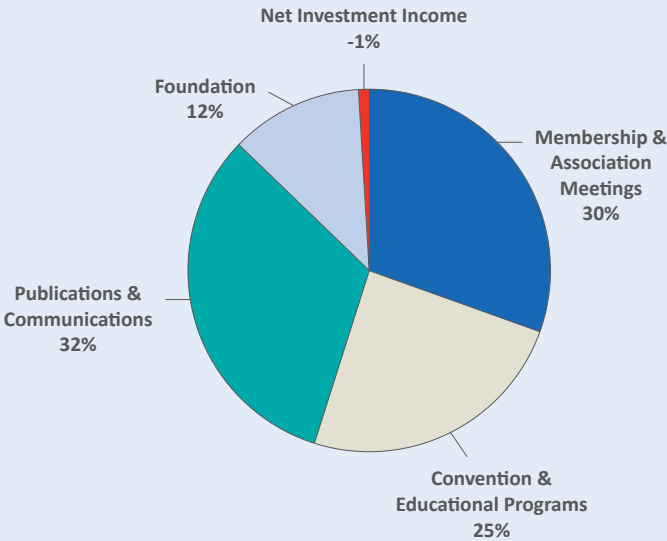
Membership & Association Meetings	792,174.00
Convention & Educational Programs	515,010.00
Publications & Communications	744,513.00
	<b>2,051,697.00</b>

Foundation

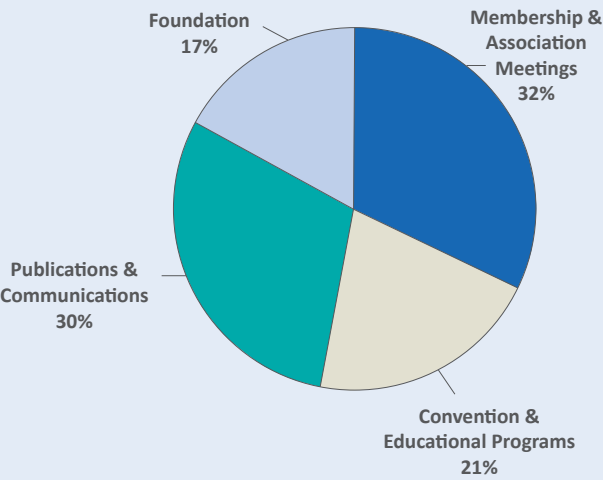
Revenue	\$472,084.00
(including carry forward and NIA contribution)	
Expenses	\$438,182.00

OVERALL PERCENTAGES

NIA Revenue



NIA Expenses



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