

May 25, 2005

**President's Report
Chimney Safety Institute of America
National Chimney Sweep Guild
Prepared by Steve Pietila for the May 2005 meetings
Indianapolis, Indiana**

I really enjoyed our convention in San Antonio where we celebrated our accomplishments of the previous year, recognized those who have helped us in those efforts, and participated in the technical and business seminars that were offered. It was great to spend time with friends and colleagues from across the country and overseas. Now that we're back and settled into our routines it's important for us all to make the time to fulfill our duties of the roles in which we serve. As leaders of the organizations, we must keep focused on the issues and responsibilities for which we have been elected and appointed. Typically these are determining the mission, strategic direction, and future programming and to provide financial oversight. There are other duties such as chairing committees, completing committee assignments, Newslink submissions, and participating in the board and member internet discussion lists. All of these take time from our own businesses and other activities. I know it can be challenging, but I want to encourage you all to take the time to lift your heads and gaze forward to the course we have set for ourselves.

The stated goals I have for the organizations this year are:

NCSG

- Improved communication system with staff (Executive Director) to provide timely feedback on progress toward written goals & objectives
- 1200 voting member companies (by convention 2006)
- 250 participants in insurance program (by convention 2006)

CSIA

- Certification standard raised – including requirements for CEUs for recertification
- Completion & adoption of Product Acceptance Program policy
- Solid and realistic plan to address financial issues of CSIA

Now granted, these I my goals for the two organizations that I articulated at our last board meeting in San Antonio. However, I do believe these are in keeping with the priorities we have established as we've gone through our planning process in years past.

At our planning meeting two years ago the three primary issues we identified for the two organizations were:

NCSG:

- Member benefits

- Market saturation of membership / increased recruitment
- Development of business training courses

CSIA:

- Develop a legal fund for defending our logo
- Promote further education above and beyond initial certification
- Pursue grant money

At the board meeting in Myrtle Beach (2004) I indicated a list of priorities upon which I would focus my efforts and also to direct the resources of the organizations. There were:

NCSG

1. Membership recruitment & retention (performed below my expectations)
2. Business building training (met my expectations)
3. MIX Groups (performed ok, but results were below my expectations)

CSIA

1. Marketing – Branding (continues to be a challenge – Product Acceptance Program may provide a boost)
2. Refocusing on the consumer (slower than I had hoped, but meeting expectations)
 - a) Chimney Check (or something similar)
 - b) Home inspectors
 - c) Realtors
 - d) Insurance adjusters
 - e) Fire marshals
3. Technology Center (some priorities have changed, need to revisit this one)
 - a) Testing of products
 - b) Facilities rental
 - c) Classes for related industries

For Both Organizations

Board development (slow but steady progress being made)

The comments in parenthesis & italics are my comments on how I think we did. Also in Myrtle Beach I identified the following goals:

1200 members of the NCSG. One of the greatest perceived benefits of membership will be the array of business building resources and training the organization has made available to its members. Five or six active Sweeps MIX Groups. The San Antonio convention breaking records for attendance and setting the standard even higher in terms of solid business and technical offerings.

For CSIA a new marketing campaign, and a some research into the feasibility of branding. The goal is to increase consumer awareness about the need for CSIA Certified Chimney Sweeps. The effectiveness will be evidenced by higher volume of calls to the 800 number, website activity and use of search engine, and personal testimonials from Certified Chimney Sweeps. The C-DET program will be revitalized and a fresh and broader marketing effort will be made. Ongoing campaigns targeting homeowners, home inspectors, realtors, insurance adjustors, and fire marshals with sufficient resources made available. Greater utilization of the Technology center including product testing, classes for related industries and meeting space rental.

Though some of these are as yet unrealized, I have carried over some of these for this year. You may wonder why I keep including these same goals over and over again in my reports. I assure you it's not for fill. We've got to keep reminding each other of where it is we are going, and to identify the benchmarks that let us know whether or not we are making progress. At our annual planning meeting we take stock of our goals and the progress we are making. We make adjustments as needed. And we commit and/or recommit ourselves to doing our part to reach the goals and achieve the objectives that we all agree to. It is a team effort, and each member has an important role to play. If ever you're not sure what your role is it's your responsibility to get direction. For committee chairs that direction will come from me, for task force leaders that will typically come from Vice President Rowell.

One of the things I am trying to accomplish as President is to develop better communication between our staff and board that will provide timely updates on our progress toward our stated and written objectives (See the first goal for NCSG at the beginning of this report). This has been a source of frustration for both board and staff alike. Our Executive Director is developing a web-based tool (a blog) that I think will provide what most of what we need. This will include a component that will basically be in the same format as the Management By Objective templates the Task Forces have been using and will help us better track our progress toward the goals and objectives we set for the organizations. It includes a description of the goal, and lists the specific objectives, strategies, accountabilities and timelines for each action plan. Being on a blog will allow board members to check on these at their convenience and gives us great oversight capabilities since they will be regularly updated by staff. I admit, I'm not thrilled with the slow progress that's been made, and I've let our ED know this. But I believe we are getting a system in place that will provide the information we need in a timely manner.

Another issue we've discussed is putting into place better systems of board member recruitment, board training and development, and board performance evaluation. These are two things I see as critical to allow for the growth we want and to achieve the loftiest of our dreams and aspirations as a trade association and an educational institute. This is not the kind of flashy exciting stuff that gets lots of recognition but is important for us if we want to do more than maintain the status quo. This of course is a major focus of our board retreat and the ongoing work of the Governance (Nomination) Committee.

This Years Training & Planning Session

In addition to the board training and retreat, the focus of our planning session will be on the CSIA. There are an array of topics that will be raised, and as you are aware several have already been discussed. The most pressing issue is the area of finances, and this discussion will be introduced by the CSIA Treasurer Robert Huta. This of course will relate to other areas of discussion including the educational courses offered at the Tech Center and any new program development to be undertaken. I think the implementation of market research needs to be seriously considered before we invest more money in program development and/or course offerings.

As a refresher, here's a quote from my Presidents Report in June 2004:

"One of the things that continues to be a concern is the low registration for courses at the Tech Center. Both CSIA classes and the NCSG business classes conducted by Tom Grandy have not met our enrollment expectations. Marketing may be a part of it, and this we'll need to discuss further – but there is an industry-wide trend that folks just aren't traveling far for these types of programs. The thinking "If we build it, they will come" just hasn't panned out. The one exception to this is the chimney sweep school, which continues to be a good draw. Other courses just aren't covering the expenses to conduct them and we can't continue to operate at a loss. As the leaders of these two groups we must give consideration to this dilemma, and come up with some solutions. I expect the board to have given these issues thought and be prepared to discuss them at our meetings."

The situation this year hasn't changed, and we can't say that the word isn't getting out. I'm afraid it isn't that simple. We are currently gathering information that hopefully will help us plan – but the fact is despite the assurances and intentions of many of our members they just haven't enrolled in the courses.

I want to repeat something I said in an email discussion regarding the CSIA Certification program. We have been amazingly successful (especially when you consider our limited budget) promoting the value of this designation to chimney sweeps and to the public at large. However, as it stands the current program does not meet everyone's needs or desires and there are a few things that can be done - and some that I believe must be done to ensure the continued success of the program. There are basically three issues that we as a board need to give direction on. The first is assessing the existing program for deficiencies, the second is creating any new designations that would be separate from the current Certified Chimney Sweep designation, and the third is the issue of additional designations for individuals already carrying the CSIA Certified Chimney Sweep (CCS) credential.

As I have mentioned before, with success in achieving a higher profile of our mark will come a greater scrutiny of its value and integrity. This is the reason that the Hearth Foundation has invested so much money in the whole standardization of their certification program.

I believe we do need to make some adjustments to bring our program a little more in line with certification programs in other professions. I'm not aware of any professional credential that gives the same (or almost identical) examination each time the credential must be renewed. I don't think we should be doing this either.

One idea that I have put out there is to take from the model that ASHI uses. They have a "candidate" status until all of the requirements for their certification are met. This is appealing for a number of reasons. The details should be left to the work of the Certification Committee but the board should direct them on the objectives for such a change. My objective would be that the current standard be raised which would require something as simple as having a currently CSIA CCS go over a checklist with the candidate on a minimum number of chimneys and/or inspections. This is just one possibility. Yes, it will make it a bit more challenging, but I think the committee can come up with the criteria to make it work. I also believe we should require at least some CEUs for recertification.

From my upcoming Heart to Hearth

"..... chimney sweeps are facing daunting challenges as the market changes and legislation to limit the construction and operation of solid fuel appliances and open wood burning fireplaces continues to be a threat. Some of us in the west are already dealing with the realities of regulated burning and even the banning of fireplace construction...."

"While hearth appliance manufacturers are working with the Environmental Protection Agency to establish a "green" fireplace, they still have a vast line of products that are not related to the burning of solid fuel. In most areas gas logs, stoves and inserts have been outselling solid fuel appliances for years. Utility companies have engaged in savvy marketing campaigns to get homeowners "connected" to their fuel lines and in many cases have gone into the retail business themselves. Though this has caused some tension with many hearth shops and retailers across the country, it has generally meant more sales of these products for all.

"...Many are simply viewing this as a change in consumer demands, a fact that all businesses must adapt to. Such a perspective is leading them to diversify their products and services to give their customers what they want. I've seen this in the most successful operations that I am familiar with. Whether it is offering dryer vent cleaning, masonry restoration, air duct cleaning, or the sales, installation and servicing of gas hearth products, these companies are expanding their operations to meet the changing demands of the marketplace.... One of our board members recently quoted Bob Dylan stating, "The times they are a changing."

Not all of our members are willing to make such a leap. And some want us to promote the benefits of burning wood... Perhaps there is more we can do as an association to promote this – after all, if we don't who will? Certainly we'd need to employ "guerrilla marketing" tactics – the cost of a significant national campaign is simply beyond our capability. We've already got our customer databases that are arguably the most valuable

asset of our businesses as well as the critical element to such a public relations effort. I wonder what a mass mailing to the customer databases of all of our nearly 1000 member companies might accomplish? Would you be willing to share this for such purpose?

This is just one idea to address an issue and a challenge that isn't going to go away. The forces of the market must be dealt with. We can try to direct these forces the way we wish them to go. This will require tremendous effort and some significant financial resources as well. Even then, there is no guarantee of success. We all must take stock of our trade and each of us of our own businesses and evaluate where we might need to change, not just to survive – but to thrive as a chimney sweep and as a business person in the 21st century.” This is just as true for the two organizations.

We can do this!

So we can see that we've got some challenges ahead, and we'll be deciding how we are going to meet them. I see some great things happening, and we need to build on our successes that include the new liability insurance program, our partnership with the EPA, and increased networking with the home inspection trade. All this is raising the recognition for our trade and CSIA Credentials.

The CSIA Product Acceptance Program has the potential of providing a decent source of revenue. This program was initiated in 1997 at the Portland convention when Duraflame® partnered with us by generously supporting the Chimney Check campaign. This use of the funds is certainly a viable option as might be using them to reduce tuition fees for educational courses. Eric Adair is heading up this task force assisted by two past presidents Jerry Isenhour and Jim Conant. I also believe this program has the potential of giving us exposure that we would have only dreamed about just a few years ago.

These three days away from your homes and your businesses is a sacrifice that many probably don't appreciate. But what we can accomplish will have an impact on the organizations and the industry for years to come. I hope that you can find satisfaction in knowing that you are contributing to the professional growth and development of an ancient and noble trade. I look forward to the stories we'll tell our grandkids and the young whipper-snapper sweeps we'll visit with in years to come.

May 25, 2005

NCSG Treasurer Report

Submitted by Ron Brigman – May 16, 2005

I just today received the April financial statement as forwarded to me from Judy Thompson. Since this Treasurer's report needs to be submitted to Mark immediately, I will not have the opportunity to look over that financial statement before hand. So I have no comments about its contents. But I will be looking it over in the next day or so and will forward it on to the full board for consideration.

The Budget and Finance committee, including the CSIA Treasurer, the NCSG Vice President, our Executive Director and myself have had phone and e-mail correspondence in an effort to plan a meeting in Indianapolis. This will take place on June 17th for the purpose of planning our budget for the coming year. Hopefully this will contribute to a smooth budget meeting, with the entire board, in July.

Weekly Financial Snapshot

Date 05/18/05

NCSG

Checking \$15,562.24

Undeposited Funds (Credit Cards not settled) \$2,315.84

Accounts Receivable \$15,221.12

Dues Receivable \$1,135.00

Accounts Payable \$11,195.70

May 25, 2005

REPORT OF THE EXECUTIVE DIRECTOR

Prepared by Mark McSweeney

NCSG & CSIA Boards of Directors Meeting

May 25, 2005 • CSIA Technology Center • Plainfield, Indiana

The benefit of putting the agenda together is that I have until the last minute to refine my own report before sending it out. There have been significant discussions going on these past couple of weeks relative to the future of CSIA and NCSG (the lion's share of which has justifiably been aimed at CSIA). Some of you have contacted me by email and phone to share your thoughts and seek my feedback as we head into our annual planning meeting. As someone who has spent a fair number of years working with associations, I appreciate the passion that many of you have been putting into these conversations, and I look forward to channeling that passion into a productive meeting this next week.

Rather than use this report platform to merely summarize where we have been since we last met in March, I would like to offer my perspective as your Executive Director relative to the areas we need to be focusing on as we set our course.

In March, I commented that CSIA is on the verge of taking a significant step forward in both of our primary areas of focus: public awareness and professional education. I still firmly believe we are on the verge, provided the organization is prepared to consider what it needs to do to be successful in today's marketplace. While NCSG has not been

quite as hot a topic recently, I share the same belief about that organization. That is, the Guild is structurally and vocationally sound, and we have incredible opportunities to grow exponentially provided we remain focused about who we are as an association and realistic about our goals and expectations.

With respect to CSIA, it is clear that we are not generating the revenue we need to continue operating in the manner that we are. We are not at a crisis point, but as leaders we obviously need to address the trend and make the business decisions necessary to turn our fiscal operations in a positive direction. The easy target is marketing. I concur that our marketing program can be more aggressive and encompassing; and regardless of other strategic conversations we need to continue to work toward that end. However, I do not believe that marketing is at the root of CSIA's challenges.

Over the years, the volunteer and professional leadership of CSIA has done a good job of creating and delivering quality programs, from our two certifications themselves, to the various technical classes we offer to back them up. However, specific to education, we are missing the boat in meeting the needs of our customers in two significant areas:

1. Market demand – From what I have witnessed, CSIA has traditionally identified what they perceive as a topic that sweeps need to be educated on, developed a program to address that topic, and then gone out to the sweeps and tried to sell them on the importance of that topic. The simple fact is that there is no incentive for sweeps to take our classes, so the only one's we tend to see are those who are self-motivated and agree with the concepts of self-improvement through formal education. The flaw in this approach is that we are attempting to sell sweeps on what we think they need to know, rather than providing them with what they want to know. I realize that our economy may be littered with examples of products that have succeeded using this model, but it is very rare in the world of technical education, particularly when there is no requirement or other tangible incentive to acquire the education.

2. Accessibility – In the online survey we recently conducted about education in our industry, the two most frequent reasons for having not attended a CSIA class are "Travel and lodging are too expensive" and "I can't afford to spend the time away from my business." From my observations, our classes tend to be too long and too expensive. We can argue (and we have) that sweeps need to consider these classes an investment, not an expense. While this is true, the expense is not merely the cost of registration, but it also includes transportation, lodging, meals, and for the majority of our market, lost revenue while they are out of their office. Is this investment worth it for the average sweep over the long term? Certainly it is; but in the short term, it still represents a significant cash expenditure that gets weighed against every other immediate cash need. Again, there is no requirement to take these classes, and little tangible incentive.

In terms of market demand, we need to accurately identify our market, and then aggressively reach out to them and find out what their educational needs truly are. In terms of accessibility, we need to accept the reality that, no matter how we package it, there is likely not a sufficient enough market to cover CSIA's expenses via education

offered solely at the Tech Center. Not only do we need to prioritize efficient ways to get our classes out into the field, but even more importantly we need to develop alternatives to traditional classroom education (CDs, DVDs, web-based seminars, books, etc). Until now, our approach toward education has been “all or nothing.” CSIA needs to recognize the varying needs and learning styles of our market and find ways to meet those needs and teach to those styles. Please note, this does not mean we need to abandon what we are doing at the Tech Center. Rather, it merely means we need to recognize the trends in our educational business and realize that we cannot rely as heavily on the physical Tech Center as our primary revenue generator.

On the subject of our educational programming, I would be remiss if I did not mention our expenses relative to the programming we are providing. While I do not condone CSIA pulling out of the education business in any way, some have suggested that CSIA could be self-sufficient if we stopped conducting these classes. Radical as that statement might be, there is a legitimacy to it that suggests we ought to take a look at the effectiveness of the expenses we are incurring in this area. Excluding our certification reviews and exams, and the National Chimney Sweep Training School (both of which do continue to be self-sustaining), CSIA is budgeted to spend in excess of \$50k this year in instructor fees and expenses alone (that does not include any of our professional full time staff, nor does that include the NCSG business classes). More specifically, that expense is scheduled to be incurred merely in the months of April-August. I do not bring this up as any form of indictment against our contracted instructors (we are indeed fortunate to have some incredible talent there), but from a business perspective it is worth considering if perhaps there is a more effective way to educationally use \$50k over a 12 month period rather than over the 4-5 month period it is currently being used.

Somewhere on the line between professional education and public awareness lays the issue of CSIA’s certification programs. Financially speaking, representing almost 40% of CSIA’s budgeted income and 46% of our actual revenue year-to-date, these programs continue to do very well for us. In the 2 ½ years that I have been here, CSIA has enjoyed approximately a 20% net growth in the number of our Certified Chimney Sweeps. While these statistics are encouraging, that growth appears to be leveling off.

Our Certification and Re-Certification Committees have begun discussing issues surrounding our certification programs, including the topics of continuing education, elevated levels of certification, and development of new certification opportunities. From a professional education perspective, I hope these discussions continue. From a public awareness perspective, I hope to see these discussions mature into reality in the very near future.

Following is a post I shared with the committee a couple of months ago relative to our current Certified Chimney Sweep program, and two specific areas I believe need to be addressed:

My comments below are not intended to be disrespectful or harsh toward the trade or those in it. You all know that I do not bring technical experience to my position relative

to chimney sweeping, nor is that why I was hired. I do, however, have extensive experience with the public and issues of public perception, and among other things that is why I was hired. While there are most certainly technical benefits for those who participate, the Certified Chimney Sweep program is very much a public issue; that's why CSIA recommends to homeowners that they hire a Certified Chimney Sweep. It is from that perspective that I am sharing these comments.

There are 2 requirements I see in some other professional certifications that do not currently exist in ours, both of which have value from a homeowner's perspective.

One is a tenure requirement. To become a Certified Chimney Sweep, one does not in fact have to even be a chimney sweep, let alone have any time or practical experience invested into acts of servicing, repairing or inspecting chimneys. As an example, I am not a CCS...but if I pass our exam I could be. If I was certified, and homeowners are encouraged to hire a CCS, then as far as the homeowner is concerned, they should hire me to service their chimney. Now I have confidence in my abilities to do several things well, but quite honestly chimney sweeping is not one of them. Passing an exam does not make me a chimney sweep, but it does make me a "Certified" Chimney Sweep. That doesn't seem right to me.

The other is a requirement for continuing education. The CCS program makes continuing education an option, but not a requirement. Again, consider what I said above about the exam. Maintaining my certification by taking an exam every 3 years, from my perspective, does not speak very well to my abilities or qualifications to sweep or otherwise service your chimney. However, CSIA suggests that it does. In some other professional certification programs (and I don't have a % that I can reference, nor am I even suggesting it's a majority), in order to maintain one's certification, continuing education is a requirement. No, education does not guarantee one's abilities either, but I do believe that most people would agree that it increases the odds as compared to a mere written examination. I do believe that someone who invests his/her time and money into continual self improvement is legitimately interested in keeping their skills as sharp and current as possible, and that is the type of service individual I want in my home.

Since posting those comments, I have begun researching other technical certification programs. While I still do not have a statistically significant sample to draw on, thus far every other program I have heard back from has a tenure requirement built into their certification (generally 2 – 5 years actively engaged in the profession), and approximately half require CEU equivalents for recertification. Interestingly enough, I have only come across one other 501c3 organization that conducts its industry's certification program (such as CSIA). The others are all administered by their respective industry's 501c6 organization (such as NCSG).

More specific to CSIA's mission of public awareness, I do believe we need to increase our attention toward pure homeowner/consumer safety-related issues. CSIA has a very legitimate message relative to the prevention of chimney fires and carbon monoxide intrusion. Unfortunately, I don't know how effective we are being at spreading that

message. National PR campaigns are huge and expensive undertakings, and I am not suggesting we are in a position to take that on. However, changing the way we do some of the things we already do could have a direct impact. As an example, when we (CSIA) attends a trade show (Expo, ASHI, NAOSHM, Affordable Comfort, FDIC, etc), we usually ask ourselves what it is we hope to accomplish by being there. These various shows are typically used to promote that part of our operations referred to as “affiliated trades,” and ultimately we hope that by building these relationships the organization will develop some future financial gain. I realize that our participation in some of these shows long predates me, but in the time I have been here, I have yet to see where our participation in any of these events promises to yield any significant financial gain for us. Don’t get me wrong, I’m not suggesting that we are wasting our time and resources by participating, but I do believe we are kidding ourselves if we expect to recoup the dollars we are spending to be there.

All of that said, I believe we need to continue to have a presence at as many of these relevant trade shows as possible. However, we need to recognize them for what they are...tremendous public awareness opportunities. In marketing terms, most of the attendees at these shows can be referred to as potential “influencers.” In other words, these individuals can help carry CSIA’s message out to those they have influence over – homeowners, manufacturers, governmental agencies, others in their respective industries, etc. Using avenues such as this to get our message out to the public is truly our mission as a 501c3 organization. When we talk about pursuing grant monies, this is where we are more likely to find success. Funding sources (grants and true partnerships) are more apt to step up to the plate when they are positively impacting a public service rather than subsidizing someone’s technical education. Taking this a step further, if we are able to obtain funding from alternative sources to finance this area of our operations, the dollars we would otherwise be dedicating to these activities could be focused elsewhere (education and/or certification marketing for example).

I do not intend for this report to be a slight against NCSG. Several of you have spoken to me about tangible ideas for improving upon the positive momentum that NCSG is beginning to feel. Paul Anderson has some great ideas for improving retention in our membership; John Meredith and Thomas Rhines have enthusiastic plans to increase benefits; Mark Putnam is leading the charge to build NCSG’s legislative presence; Greg Polakow is heading up a great new program to promote growth of the industry itself; Paul Hempel is keeping his finger on the pulse of the communication needs and expectations of our membership. The staff is intimately involved in all of these projects and more. Don’t think for a minute that NCSG is falling to the back burner. I don’t want us to lose sight of our responsibilities toward the association, but as we head into a few short days of very important discussions, I believe we need to be realistic about how we will utilize our time to have the greatest impact.

I look forward to our upcoming meeting, and am anxious to start applying the passion of these past weeks’ discussions into a workable and focused plan.

Respectfully submitted,

Mark T. McSweeney
Executive Director

May 25, 2005

NCSG Region 1 Report

State Guild Presidents and/ or Representatives from the eleven states that make up NCSG Region 1 were contacted via electronic mail to find out what they would like to highlight this month.

Maryland

The Maryland Guild ceased organized function in the late 1980's however Jerry Neal of Sugarloaf Chimney Restoration has graciously offered to be the Maryland contact .

According to CSIA and NCSG websites, there are currently 75 CSIA Certified Sweeps in Maryland; 44 Members of NCSG.

Delaware

Delaware does not have a guild. According to Ernie Hostedler "beginning work was attempted a couple of times but never happened". He is a member of the New York State Guild.

According to CSIA and NCSG websites, there are currently 19 CSIA Certified Sweeps in Delaware; 6 Members of NCSG.

New Jersey

NJ State Guild President, Bill Ryan, states their guild is going to be entering a new era as elections take place between now and June... with the new set of officers, though many of the same people may be on the board, they will be changing responsibilities.

At their upcoming June 26th Membership Meeting there will be a presentation by Flexi-Brick. NJ is working on a charity workshop for this summer (or next spring). There will be a workshop on chase construction and cultured stone applications, date still to be determined. And finally NJ Guild is still awaiting legislation to require all NJ chimney sweeps to be registered with the state.

According to CSIA and NCSG websites, there are currently 92 CSIA Certified Sweeps in New Jersey; 73 Members of NCSG.

Pennsylvania

Mike Ellis, President of PA Guild, reports that PA's Annual Charity Workshop is

scheduled for May 12 -14, 2005 and the renowned PA Guild Fireplace and Masonry School will be held from June 6-10, 2005.

According to CSIA and NCSG websites, there are currently 149 CSIA Certified Sweeps in Pennsylvania; 80 Members of NCSG.

New York

Ruthie Francisco, President of the NY Guild, shares news of two workshops this month (Fireguard on the 11th in Bronxville, NY and Gastite Certification on the 20th near Rochester, NY with a seminar on how to use the “Eye of the Viper” with a real-life scan and a “how to incorporate pictures and video images into a basic evaluation report “seminar.

Several other workshops are being planned which include an intensive Priorfire new construction workshop in August and a Golden Flue workshop, that date still to be determined. The Annual New York Summer Workshop is slated for July 29 - 31, 2005 in Mosherville NY.

According to CSIA and NCSG websites, there are currently 122 CSIA Certified Sweeps in New York; 84 Members of NCSG.

Connecticut

Connecticut is a satellite of the NY Guild. Marisa Chirico, Area Vice –President is planning a Payton Workshop in July focusing on Negative Pressure Problems and Solutions. She hopes to launch membership campaign with the workshop to increase membership in CT, which would broaden NY Guild membership and hopefully NCSG membership. Workshop date and location to be announced.

According to CSIA and NCSG websites, there are currently 58 CSIA Certified Sweeps in Connecticut; 34 Members of NCSG.

Rhode Island

Rhode Island update from Mark Putnam; there will be four RI Guild members attending the D& D at the CSIA Tech Center on May 16-20, including himself.

According to CSIA and NCSG websites, there are currently 24 CSIA Certified Sweeps in Rhode Island; 10 Members of NCSG.

Massachusetts

There will be an Asbestos Awareness and Lining Installation and Marketing Seminar on May 25, 2005 and a CSIA Test & Review on June 11, 2005. MA Guild Internet site has up-to-date postings of seminars and workshops, Annual Membership and Board Meeting schedules. Jeannie Jacobson, MCSG President,

According to CSIA and NCSG websites, there are currently 85 CSIA Certified Sweeps in Massachusetts; 48 Members of NCSG.

Vermont

VT State Guild President, Ian Conway, has not had an opportunity to reply to request for guild events, concerns, or news that he'd like highlighted.

According to CSIA and NCSG websites, there are currently 36 CSIA Certified Sweeps in Vermont; 17 Members of NCSG.

New Hampshire

Early registration numbers could not support the CSIA D&D Seminar in May. NH Guild regretfully had to cancel the event. Their Annual NHACP "Sweep Fest" on June 25, 2005 in Newmarket, NH – a day filled with seminars and vendor presentations- is still on and there are plans for a workshop in September; time and place to be announced.

According to CSIA and NCSG websites, there are currently 39 CSIA Certified Sweeps in New Hampshire; 21 Members of NCSG.

Maine

ME State Guild President, Steve Calnan, has not had an opportunity to reply to request for guild events, concerns, or news that he'd like highlighted.

According to CSIA and NCSG websites, there are currently 16 CSIA Certified Sweeps in Maine; 12 Members of NCSG.

Summary

Response to initial e-mail contacts of NCSG Region 1 State Guild Presidents and Representatives was encouraging. Hope to cultivate an arena where regional concerns can be articulated and addressed.

Respectfully submitted,
George Stroup
NCSG Region 1
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May 25, 2005

Region 2 Report

Submitted by Ron Brigman – May 13, 2005

SCSA Convention

The Southeastern Chimney Sweep Association held their convention in Chattanooga TN since our last meeting. The crowd was small (around 125 attendees) but it was a very enthusiastic crowd. This particular convention had been awaited with great interest on several fronts as the SE group was trying out a new format. There were several notable differences from past regional conventions. It was billed as no tradeshow and it didn't

have a traditional tradeshow. The vendors were encouraged to present themselves in ways that they thought would be the best use of their marketing dollars. They were given a variety of things to choose from and if nothing fit, were encouraged to help create their own presence. Most of the promotional events were centered around some sort of reception or get-together.

The closest thing to a trade show that transpired was their Exhibitor Reception event. Here there was the only opportunity for suppliers to do a tradeshow type display if that was how they were more comfortable. But it was mainly a social event/reception type get-together. And many suppliers chose to have a more laidback presence. One supplier even had a trivia game going on in their space. Suppliers and attendees alike seemed to have a great time.

The suppliers' feedback was that they actually had more time to cultivate clients and the current and potential clients seemed to stay around longer to be cultivated. This resulted in new clients for many of the participants. The attendees feedback was that they liked the socializing and all the great free food that the SE event serves up. All seemed to be happy campers.

As I was encouraged by the response I got from my email note last time, I did it again this time. I received responses from several state guild officers.

West Virginia

No correspondence from West Virginia this time around.

Virginia

The Virginia Guild has been reorganized as The Virginia Association of Chimney and Hearth Professionals. They are in the process of getting the word out to old members to join the new group. George Anderson is currently serving as president of the new organization. They are taking membership by application only.

One of their goals is to bring hearth people and sweeps together to work together to educate the public on the subject of installation and operation of hearth products.

Virginia is having a three day workshop on June 2-4 in Newport News hosted by Jim Bostaph. The subject will be cast-in-place liners. This will be a hands-on project with CEUs available.

In Sept. the VA guild held a D&D. Even though this was during the transitional phase of the organization, the event was well advertised but not well attended.

North Carolina

I had no personal correspondence from NC this time. But I do receive their newsletter on a regular basis. This circulates to about 300 companies and gives good coverage to what is going on in their association. The calendar of events shows that they will hold their summer meeting at Jacksonville Beach on August 19 & 20, hosted by Pete and Joan Bixby. A seminar on removal and replacement of prefab fireplaces is planned.

South Carolina

The SC Chimney Sweep Guild had a strong presence at the SE convention. Much of the activity of the guild since, my last report, was centered on participation in that event. Several SC members were key planners on the committee. No official guild meeting or event has taken place since my last report. Lucky Dale's wife, Patsy and daughter Daisy are planning to host the annual gathering at Connemara this year. The guild will be working with the family to organize this event sometime in the late summer. This will be the first gathering at Connemara since Dale's death. We are not sure exactly what it will turn out to be, but it will no doubt be a bit different.

Georgia

Mike Wilcox has taken over the reigns as president of the Georgia guild. He is currently working on formulating a training/ education schedule for the next year.

Florida

The Florida guild will be having a quarterly meeting in conjunction with a seminar on cast and carve smoke chamber techniques. This will be hosted by Jay Walker on June 4, 2005 in Tallahassee.

Summary

Informal talk with sweeps indicates business in the area to vary from a little slow to great. I plan on attending the Florida event in June and hope to attend other state guild events around the region during the summer.

May 25, 2005

Region 3 Report

Indiana - A couple of sweeps slow to very slow business in chimney sweeping. Service diversification is a big help this time of year. Glad to have fair weather back in favor for masonry and water proofing etc. No licensing requirements for sweeps or mechanical restraints to installing liners or stoves and such.

Illinois - One sweep reports slow work for sweeping. He is a one man operation and been for over a decade. Doing what he has always done. Advised as to the guild offerings, CSIA classes and that convention is in the region next year. Licensing for hearth installations not regulated by the state but by local

governments either city or county. Some are quite stringent others easier to comply.

Kentucky - Work is seasonal yet some do not offer simple add on services to help over slower times. The only licensing requirements are those found set up by cities in their jurisdiction and consist of a contractors license to insure workmanship and insurability.

Missouri - Sweeps differ with one dead slow on sweeping to normal to extremely busy to the point of difficulty keeping up. One company planning to go exclusively to inspections. Licensing is by county. Some have it most do not. Ideas of advanced certification seen as a good thing. Midwest Chimney Safety Council sponsoring a pizza oven workshop in July and some dates for certification reviews and testing.

Michigan - Spoke with a sweep that had his worst spring ever and reported declining business for a couple of years. Not certified, but he recently received SCS and i have him very interested in the review in Indy and the 2006 convention. Another sweep reports a savings of \$700.00 with the new insurance benefit. A Grand Rapids company experienced something of a bidding war and reports three competitors now have phones disconnected. I guess they won! The State of Michigan has mechanical licensing requirements covering several disciplines. Solid fuel speciality, Ductwork encompassing liners for gas and Gas piping among others.

Ohio - No apparent activity in local Guild and otherwise no reponses.

I have been encouraging regional companies to consider attending the coming convention in Kentucky and have been met with a positive note. Looking forward to the July meeting to garner more ammo to make a good regional showing.

Respectfully Submitted - Thomas Rhines

May 25, 2005

NCSG REGION 5 REPORT
5-14-05

WISCONSIN

First quarter business started off on an even note with the previous year which was down. April and May numbers show lower than last year for this time. It's been another long cool spring with homeowners still burning, hindering repeat cleanings. Wisconsin Guild is planning to have Ellen Rohr of Bare Bones Biz back again next January for an

advanced financial seminar using two anonymous companies that will help show struggles faced by companies in our region.

MINNESOTA

Experiencing same challenges as WI. Members looking for ways to improve their numbers and have a strong showing through the WI guild events. Looking for ways to diversify that help bottom line numbers. Good comments about content at the San Antonio convention.

NORTH & SOUTH DAKOTA

Winter was longer, but not really colder than usual. Hoping the spring weather will warm up and produce more activity.

IOWA

Business described as sluggish with retail sales down.

NEBRASKA

Nebraska state guild is small but stays active promoting CSIA certified sweeps. Experiencing the same struggles as the rest of the region.

GENERAL CONDITION

Overall the region is down mainly due to world events, economy and long cool winter. Many members struggling to keep revenue and finances to the positive hoping that warmer spring weather will be here soon spurring more activity. There was also interest in the liability insurance program with a lot of applications being distributed to members.

Respectfully submitted,
Howard Rowell
Region 5 Director NCSG

May 25, 2005

NCSG Region 7 Director's Report
May 16, 2005
Submitted by Steve Pietila

Here are the current membership figures for Region 7:

Oregon – 8
Washington – 11
Wyoming – 2
Montana – 0

Idaho – 4
Alaska – 1

Total – 26 (up two from last report!)

I attended the Oregon Chimney Sweep Associations annual convention at the first of the month. It was one of the best in terms of offerings in recent years. There were 40-50 attendees and speakers included Bill Paynton, Dale Feb, Michael Stone, Dan Byrne (US PlusAire) and a very good presentation on electrical safety from a Pacific Power representative. I also proctored the CSIA Certification for four chimney sweeps.

As I mentioned before, I have not been very active in the area of recruitment but do make myself available to members in my region. Most OCSA members continue to be satisfied with the level of involvement and don't wish to join the national organization. OCSA still has it's own certification program, and again most choose to stay with just that.

Business has been above average for most, and despite a relatively mild winter I don't think folks are too concerned about what the fall might hold.

May 25, 2005

May 2005, Region Eight Report.

Currently, member sweeps total 0 in the state of Hawaii, 2 in Arizona, 2 in Nevada, 4 in Utah and 77 in the great state of California. That's right a grand total of 85 region eight members, 1 more than at last report.

The "Golden State Chimney Sweep Guild" remains the only state guild within region 8. The GSCSG is its annual convention and trade show on Wednesday July 6th, through the 8th, at the Barona Resort & Casino, near San Diego.

Sweeps I have spoken with had a better than expected winter and spring so far. With the robust economy, new construction, home renovations and real estate values at all time highs, the summer months look promising as well.

I attended the GSCSG southern California work shop on April 1st, and enjoyed spending time with old friends. I was able to connect my insurance man with the folks from Stratus prior to the event. With some encouragement, my insurance man attended the work shop as well, and made an energetic presentation to the group of forty or so companies present. It is my understanding that of the 8 California Sweeps that have contacted his office since the work shop all 8 have signed on. I spoke with Nick Pulone at the time of this report and he confirmed savings for one man operations to between \$400 and \$500! Sweeps with bigger policies such as my own are saving \$700+ !

Respectfully submitted,

Randy Brooks
NCSG Region 8 Representative

May 25, 2005

NCSG Convention and Events Committee Report May 2005

San Antonio Wrap-Up:

The 2005 NCSG Convention in San Antonio was a success on nearly all levels. Although our total number of non supplier attendees was down from Myrtle Beach (388 vs. 330), we actually had an increase in attendee companies represented (174 vs. 192). Considering our last fly to western convention hosted only 113 attendee companies (Denver), I consider this a real accomplishment and it bodes well for future events. Overall profit level for San Antonio was down from Myrtle Beach (approx \$60,000 vs. \$48,000). This was expected and due the lower registration numbers.

Developments since March:

Northeast in 2007:

The contract with the Mohegan Sun has been signed. It is an extraordinary property and I look forward to showing you a brief presentation on this resort during my report. Among its many features is a drive-in ballroom which will allow NCSG to court new suppliers including those who produce and customize vans and work trucks. This easy entrance will also serve the needs of those suppliers who ship in larger crates.

Fun in the Sun:

While in Jamaica, I met with the sales staff for Sandals Dunn River and toured their conference center. This is the second Sandals facility I've reviewed while on vacation with NCSG in mind and I was encouraged by what I saw. As many of you know, I am interested in the NCSG hosting a tropical retreat some time in the future. This idea is premised on using an all-inclusive resort and aiming the education at business owners. More specifically, I like the idea of aiming the education at spouses who work together. I envision a week long event with four two to three hour sessions. Each session will be hard core business assessment and development with perhaps a bit of "working relationship / marriage counseling" also part of the program. This project is just beyond the idea stage and I am now beginning to gather information about viable properties and considering how to make such an event work without it being cost prohibitive to attendees or NCSG. I'll keep the board posted of any developments.

Plans for the next 6 – 12 Months

More Site Selection:

With site selection for 2007 now complete, focus will shift to the search for a 2008 venue. As most of you know, as a result of board action, we are committed to traveling to the west coast in 2008. The preliminary search is underway at this time. It is my hope to complete this site trip this summer and follow that site selection with finding our 2009 venue in the Southeast before the end of the year.

Convention program assessment:

The overall direction of NCSG conventions is a good one. Even with a western convention the number of attendee companies increased indicating to me the strength of our events. I feel the strength comes from the quality of programming with the recent additional focus on business training. Simply put, it makes sense for a business owner in the chimney industry to attend our convention when they look at their bottom line.

Respectfully Submitted,

Robert Huta,
NCSG Convention and Events Committee Chairman

May 25, 2005

NCSG Supplier Director Report

May 2005 BOD meeting

There is little new to report from the supplier side of the industry since my last report in terms of supplier activities. Like many of you, more suppliers are diversifying their businesses and looking for different revenue streams as the traditional chimney industry becomes more competitive and less profitable as it matures.

The general business climate is good, not great.

Many of our suppliers have already reserved their booth space for Louisville (45 booths sold to date) and I expect more to book once we resume active solicitation for booths after the beginning of the next fiscal year (September). The priority point system was used by a number of suppliers in San Antonio for their booth reservations. Those who took advantage of this program seemed happy with it.

With the signing of the contract with the Mohegan Sun for 2007, the NCSG is in a better position to court a more diversified supplier base. Please see my convention and events committee for more information on the property. The nature of its exhibit space allows for supplier to drive in vehicles as well as bring in larger and more elaborate displays. This drive in capacity is a key in our pursuing those who build and customize work vans.

As you know, Copperfield Chimney Supply has offered to donate up to \$10,000 dollars to CSIA in matching funds. To date, that program has not done as well as had been hope by Copperfield or CSIA. I'm sure this will be discussed in the long range planning meeting and in Mr. Polakows committee report further. I do think the lack of interest in this program is indicative of the donor climate in our industry for both sweeps and most supplier members.

Respectfully Submitted,

Robert Huta,
NCSG Supplier Director

May 25, 2005

Long Range Planning Committee 2005 STRATEGIC PLANNING WORKSHOP

This is probably the most important function the Board does out of all of the meetings during the course of the year. The purpose of the Board is to set the course for direction of where we want to be and how we will get there. It starts with defining who we are and our purpose through our mission statements and proceeds with a list of goals and objectives with a plan of action for attaining those goals.

Over the years we have done a very good job of defining who we are and what we would like to see accomplished and have been somewhat successful in achieving those goals. One of the frustrations we face is looking back at what we wanted to make happen in the time line that we thought it would happen and not seeing the results we expected. A couple of things to keep in mind is that without vision or goals in place we wouldn't even be close to what we have accomplished already. Also without benchmarks in place we are at a loss to look back and ask ourselves some very important questions. Were our goals in line with our mission statements, is it meeting a need of the members and are they seeing the value of what we are offering. Does the program attract a large enough number of members to justify it and if not can we draw interest from those in affiliated trades. Much of what we come away with at this planning session will have an impact on our Finance Committee and tough decisions they have to face in the budget process.

One theme comes across loud and clear year after year. We need more members and need to tap into our affiliated trades to help establish base attendance numbers to support continuing a given class or benefit. The simple answer to why someone is not a member or taking advantage of a class, convention, or other offering is that the perceived value is not quite enough for them to make the final commitment. We have to then ask ourselves how do we make what we are offering so valuable and attractive that it becomes an easy decision for them to participate. In some instances it may be that there is enough value,

but we are not marketing it clear enough for them to be able to make that decision. If this is all starting to sound a little familiar it should. This is what we do every day in our own businesses in promoting a product or service to meet the needs of our own clients.

At this strategic planning workshop we will identify and prioritize what our objectives are for short and long term as we have done in the past years. But we need to concentrate our efforts in depth this year on why we aren't where we thought we would be and what we need to do to get us where we want to be along with an accountable timeline that is reported back to the Long Range Planning Committee on a quarterly basis on how our objectives for NCSG & CSIA are taking shape. This will help us to see not only if our action plan needs correcting, it will also tell us something about what impact the timing and frequency is having on membership/programs. With the work that we have done over the past couple of years with our mission statements and goals, this will enable us to devote more time to completing our action plans during this session.

Over the past couple of weeks we have had some good ideas exchanged on the Board discussion list. This is always challenging on the Internet due to response time and trying to determine when to change to the next subject. On the positive side it gives us all a chance to think about our objectives ahead of time for not only the next year, also for years to come and plan for the future of NCSG/CSIA.

Action plans were hung on the Board's area of the NCSG web site for all to review and offer input. The most recent action plans are enclosed with this report as submitted by group leaders. They were developed at the end of last years LRP meeting as a format for us to work on throughout the year. Review of these ahead of time will help all board members recall last year's process and how our task forces and goals developed over the past year.

With the talent and ideas our Board has I am confident we will come away from this session with some great ideas and action plans for the future of NCSG & CSIA.

Respectfully Submitted,

Howard Rowell, Long Range Planning Chairman

May 25, 2005

Bylaws Report

The Bylaws committee continues to monitor for any proposals that may require a change to the bylaws. There are no recommendations for any bylaws change to recommend to the board at this time.

Respectfully submitted,

Howard Rowell
Bylaws Chairman NCSG/CSIA

May 25, 2005

MEMBERSHIP REPORT MAY, 2005

The membership committee is currently undergoing some major changes. After retuning home from convention in late March, I began the task of looking over the SOP for retention membership specifically.

As has been the policy for sometime, staff sent an e-mail to committee members, listing those who had not renewed there NCSG membership, despite three letters from the office, 60 days out, 15 days out and 15 days after. Committee members from each region were to contact personally, each of the former members by phone, and report back ASAP. To date only two committee members have reported back. This is unacceptable. I plan to contact these committee members myself in order to gage there level of devotion to this committee.

I have included copies of the three letters mention above. I have expanded them to include mention of our new insurance program as well as the coupon book. Please look them over, as I want to have them in place immediately. Your comments are welcome as I feel this most important task requires support and direction from many.

We have established a brain trust of four committee members that have met twice since convention via teleconference to discuss at length the coupon program. We have established a template that will be edited with each supplier's contributions. We have sent letters to 75 different suppliers alerting them that one of the fab four will be in contact soon nailing down the information.

The staff has totals membership at 983. This is up from convention 970 total but does little to impress me I know we can do much better. A real gauge as to our new member benefits and there perceived value will get it real test after the coupon book is in place and the mass mailing begins.

I would like to increase the membership budget significantly as to employ a marketing firm such as Y2 who spoke at convention. I feel we need there assistance in creating hot buttons that non members will be drawn to.

We have much work still to do in membership and plenty of enthusiasm to move ahead. Always remember that if you always do what you've always done, you'll always get what you've always got.

Respectfully submitted,

Randy Brooks

May 25, 2005

Nominating Committee Report 5/05

Overall I'm none to happy with the way the nominating committee is running. I still don't feel like we're able to recruit and run a full slate of qualified candidates. We're pretty much finding one candidate, maybe two, for any particular position.

New guys please don't take the above paragraph wrong. I'm very glad to have all of you on the board and respect your decision to serve. I think you'll all be great board members. But in an ideal world we should have a roster of highly qualified people waiting to get on the board, with three or four good candidates for every open seat. In the last election we had two good candidates for one seat, one out of two qualified candidates for another, and just one candidate for the third open seat.

What seems to be lacking besides the obvious hat full of names, is a process to entice good candidates in the first place, engage them in some useful manner on a committee or such in order to help vet them, and finally some personal contact with someone they know and trust in order to help them make the decision to run. Perhaps the order of the above points should be different but you get the idea.

What I've tried to set up is a committee of people from different parts of the country in hopes they will each know the good people in their respective regions. This really is only part of the puzzle and it doesn't seem to be working very well. While I'll take full responsibility for the lack of progress I see in our nominating process, once again I have to ask that ALL board members consider themselves more or less de-facto members of this committee. You are already the people from all around the country that should know who in your area is a good prospect and help bring them to the table.

I know you're tired of hearing it, but if we can get really good people around this table all the other business will begin to fall into place. It's of primary, strategic importance that we do this very, very well.

Again, I feel our nominating process is in much need of work, and I solicit your ideas, advice, and your help in making it happen.

Respectfully,

Paul Hempel
Nomination Chair

May 25, 2005

Trade Development Committee Report – May 2005

The Trade Development Committee has been working on a creating a training program for high school graduates. The program will be called the Chimney Safety Institute of American Chimney Academy. Since this whole idea has been discussed at the Board level on prior occasions, I'll just provide an update here.

The program as it exists now does not have an internship component. Students will spend approximately a month taking the National Chimney Sweep Training School, Chimney Physics, Advanced Inspection and Documentation, and a segment on in home sales and customer service. Graduates will receive CSIA and CDET certification.

In addition, each graduate will receive a formal, frank written evaluation that will be available to prospective employers.

We have developed a very short survey to assess our member's interest in hiring graduates to full-time permanent positions. Once we have the results of that survey in hand, assuming the response will be positive, we will begin marketing the program in earnest.

That probably means we will not be recruiting students for this fall, but rather shoot for next year. That will give us ample time to develop the marketing tools we need, add whatever refinements to the program we deem necessary, and perhaps seek out sources of financial assistance.

The total cost for the program excluding room and board will be about \$3500 to \$3800. Students will be on their own for housing and board. However meals are included for part of the program.

Once all of the elements are finalized, we will put the finishing touches on a brochure and begin making plans for marketing the program throughout the United States and Canada.

May 25, 2005

NFPA 31 Report

On April 28, 2005 I attend the NFPA 31 meeting in Quincy MA. The oil sizing charts in the annex was once again a hot topic. Below is the Report on Comments and the reason the committee rejected it.

Report on Comments - November2005 NFPA 31 (31-6.6 and Annex E) : Log #5 Final
Action: Reject

Submitter: Edward Angelone, KeySpan Energy Delivery

Comment on Proposal Number: 31-8

Recommendation:

Appendix E should be removed from the appendix section and reinserted at Chapter 6 "Venting of Combustion (Flue) Gases"

As per Department of Energy Standards, modern oil fired heating equipment is rated at a higher efficiency than the older heating unit it is replacing. If connected to an existing exterior masonry chimneys, the flue gas temperatures are much lower and the chimney may need to be relined, in an effort to promote proper draft, prevent water moisture and condensation and the potential collapse of the chimney, creating an unsafe condition.

Substantiation:

The committee rejected the proposal stating mandating this requirement is premature, until there is sufficient laboratory and field data that validates the computer-generated model on which Annex E is based. As per another NFP A document, NFP A 54, venting tables were designed for this specific purpose. Whenever a fuel gas heating unit is connected to an existing exterior masonry chimney, the installing contractor must follow the venting tables. This should serve as validation. In addition, there is a conflict between 2 NFP A documents. For the Committee to state there is not enough data to validate this recommendation and to ignore the NFPA 54 document, further explanation of denial of this recommendation is required, as the exterior masonry chimney is fuel neutral and not following this requirement, will result in an unsafe condition. I respectfully request the NFPA 31 Committee reconsider this recommendation. thank

Committee Meeting Action: Reject

Committee Statement:

This issue is still under test and validation and the Technical Committee is unwilling to make mandatory the information in Annex E, which was developed based on computer modeling, but has not been validated against field experience. The Technical Committee further notes that the Gas Appliance Manufacturers Assn. and the Oilheat Manufacturers Association are jointly working to develop a research program that will address oilheat appliance venting issues. The two associations are working with member companies, National Research of Canada, and Brookhaven National Laboratories to develop the scope and work statement for this project. The outcome of this project is expected to lead to proposals to revise NFPA 31 and CSA B139, as well as the UL and CSA standards for the various oil-burning appliances.

I explained to the committee that chimney sweeps have been using the sizing charts since 1997 and that they do indeed work. The committee acknowledged that the sizing charts are needed and should be included in the next revision cycle of NFPA 31

On the bright side I will be on the Industry Research Program to Address Venting of Oil-Fired Appliances. When I found out about the research I called David Bixby and asked him to include the NCSG. Below is the correspondence with David Bixby from GAMA

John: Nice talking with you yesterday. I have put you on the roster for the working group developing a scope and work statement for a proposed industry-wide research project to address oil appliance venting. The working group is comprised of the following:

John Spanko Armstrong Air Conditioning
John Bohan R. W. Beckett Corp.
Thomas Butcher Brookhaven National Laboratories
Bill Kleftis Burnham Holdings Inc.
Thomas Tubman Carlin Combustion Technology, Inc.
Dave Feters Hart & Cooley, Inc.
Skip Hayden Natural Resources Canada (NRCan)
John Batey Oilheat Manufacturers Association (OMA)
Bob Hedden Oilheat Manufacturers Association (OMA)
David Bixby GAMA
John Pilger National Chimney Sweep Guild

Attached below is a copy of the draft. I have received comments from many of the above working group members. I will compile the comments and schedule a teleconference so we can discuss this further. Please send me your comments.

Industry Research Program to Address Venting of Oil-Fired Appliances

Scope: To develop technically substantiated guidelines and criteria for venting oil-fired appliances to address safety, reliability, efficiency, and cost of residential oil heating systems.

Work Statement:

Phase I – Document Review. Estimated Cost

Compile documentation on past research and studies related to oil appliance venting issues. (Currently being conducted by John Batey for OMA.)

Phase II – Field Study.

Conduct a field study, with assistance from the oil heating and industry and the National Chimney Sweep Guild, to develop a database on performance of existing chimneys, including installations employing power vented and sidewall vented systems.

Phase III – Laboratory Testing.

Develop a full-scale test stand to conduct direct measurement of liner wall temperatures and condensation under realistic transient conditions. Include traditional chimney venting systems, plus power vented and sidewall vented systems. Data will be used to correct and/or validate existing computer models that supported Appendix E, Relining Masonry Chimneys, in NFPA 31, and coverage specified by CSA B139 for Canada.

A Categorization test for oil appliances should be developed and validated, similar in concept to the Z21/CSA gas appliance standards.

Evaluation of combustion air supply and air/exhaust balancing should be conducted, focusing on power vented and sidewall vented systems.

Phase IV – Upgrade of Existing Vent Simulation Models.

Make improvements to existing chimney simulation models to expand the range of cases and improve modeling of heat transfer and condensation subroutines.

Phase V – Final Report and Recommendations.

The final report will include the results of the above research, an executive summary, and list of recommendations including: Proposing revisions to NFPA 31, Standard for the Installation of Oil-Burning Equipment, and CSA

B139, Oil Appliance Installation Code; guidelines concerning the proper selection of venting materials for high efficiency oil appliances for non-condensing and condensing designs; a proposed oil appliance categorization test for inclusion into the applicable UL and CSA standards for oil-fired appliances. Should also encourage harmonization of NFPA/CSA oil appliance installation codes and UL/CSA oil appliance standards.

Respectfully submitted,

John Pilger