

# 2009

INTERNATIONAL **SAFETY EQUIPMENT** ASSOCIATION  
**REPORT TO THE MEMBERSHIP**

INTERNATIONAL  
**SAFETY EQUIPMENT**  
ASSOCIATION

**ISEA**

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# 2009 was a challenging year.

It was a challenging year for businesses, for financial institutions, for government, for men and women looking for jobs, and for companies whose sales are tied to the workforce. As recession took hold, employment fell sharply, depressing markets for personal protective equipment. At the same time, a global influenza pandemic was putting stress on the supply chain for healthcare PPE. Through it all, ISEA member companies continued to produce and supply high quality equipment to workers around the world, and the association's programs of standards development, regulatory involvement and market information kept pace.

Members use ISEA to develop product standards vital to the safety equipment marketplace, meet with legislators and regulators to forge public policies favorable to the industry and the workers who use its products, and get timely and focused information to help them make profitable business decisions.

Here are some of the highlights of 2009:

- ISEA published revisions or reaffirmations of six ANSI product standards, readied others for approval, and continued to work on new standards to meet the needs of suppliers, customers and regulators.
  - A new ISEA Web site went online with enhanced member content, easier navigation and an online store.
  - OSHA accepted ISEA's position on use of consensus standards in regulation of PPE, ensuring that worker protection is maintained at a high level.
  - ISEA refined its market data programs, adding new companies and providing companies with information available from no other source.
  - The Federal Highway Administration mandated the use of high-visibility safety apparel compliant with an ANSI/ISEA standard.
  - ISEA worked with CDC on health care worker protection against the H1N1 virus, while lobbying the government to renew stockpiles of vital PPE.
  - ISEA's Executive Summit provided members insight into the economy, politics, trade and taxes.
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## **MEMBERSHIP**

ISEA is the association for personal protective equipment. Its focus is on the product, and its mission is to support its members in the business of designing, manufacturing, marketing and supporting products that protect people doing work.

"A strong and growing association" is the first priority in the ISEA Strategic Plan. Recognizing the state of the economy and its effect on this industry, it was clear through 2009 that maintaining the membership and strengthening participation would be as important as growth. ISEA reorganized the staff to clarify who had primary responsibility for membership, and took steps to communicate the value of the association to its members.

One important part of this process was establishing a new on-line membership records database, and tying it to a revamped Web site. The new site, which was in development throughout the year, was previewed at the Fall Meeting and became fully operational at year-end. It offers enhanced member content with individual log-in security, an online store for ordering publications, member access to product group documents and rosters, and more public information including an on-line buyers' guide. It also provides flexibility to enable ISEA to build and use new communications tools as they become available.

Without a trade show or significant revenue stream other than membership, ISEA is highly dependent on member dues and fees for its operating funds. This demands careful and constant attention to the fee structure to ensure that it is fair and adequate. ISEA instituted a new fee scale for 2009 for companies with over \$100 million in sales, which helps cushion the loss of revenue to the association when one member company buys another. But ISEA did not increase dues for companies below that level, in acknowledgement that many member companies would be facing a tough year.

During the year there were three new members, six resignations or terminations, and one consolidation, resulting in a member count of 74 companies (70 regular, 4 associate) at year end.

## **PRODUCT STANDARDS AND REGULATION**

ISEA is a standards developer, accredited by the American National Standards Institute (ANSI) and responsible for product performance standards for a wide range of personal protective equipment. This work is carried on in the product groups, where members draft new standards and revisions to keep standards current, interpret standards for users, and oversee ISEA representation on standards committees of other organizations in the US and around the world.

The essential building block of the association is the product group. That's where market needs are assessed, standards are drafted and managed, regulations are scrutinized and decisions are made to influence public policy. Membership in product groups gives companies the opportunity to meet and work with peer organizations, while enjoying benefits of being part of the larger industry association.

**Emergency Eyewash and Shower.** ANSI/ISEA Z358.1-2009, *American National Standard for Emergency Eyewash and Shower Equipment*, was approved in September. This is a true world standard – the only consensus standard for industrial eyewash and shower equipment – and is widely used as the basis for workplace regulation. Notable updates to this revision include specification of a temperature range for flushing fluid, clarification of certification procedures, and expanded criteria for personal eyewashes.

**Eye and Face Protection.** Development of ANSI/ISEA Z87.1, *American National Standard for Occupational and Educational Eye and Face Protective Devices*, is the responsibility of an independent accredited standards committee, for which ISEA is the secretariat. That committee worked throughout the year on a revision to the standard, which changes the selection focus from the type of device to the hazard against which the device is intended to provide protection. Resolving product testing issues took time and energy, but by year's end the committee was close to consensus. This standard is also cited by OSHA in its personal protective equipment regulations.

At the Fall Meeting, the Eye and Face Protection Group kicked off development of a new standard for eye and face protectors for biological hazards (ISEA 119).

**Fall Protection.** Standards for fall protection are the domain of the ANSI Z359 committee. ISEA has representation on that committee and many of its sub-groups, which worked through 2009 on a series of new standards collectively known as the Fall Protection Code. ISEA provides an important balance on these committees, ensuring that manufacturers' concerns are adequately addressed. ISEA is also a member of the ANSI A10.32 subcommittee for fall protection in construction and demolition, and provides some administrative and meeting support.

**First Aid.** ANSI/ISEA 308.1-2009, *American National Standard – Minimum Requirements for Workplace First Aid Kits and Components*, was approved in May. This standard specifies a basic range of first aid products to deal with most types of injuries encountered in the workplace. Significant updates in the revision include the designation of new kit types, expansion of the required supply list to include a first aid guide, and a redesign of the product label.

**Hand Protection.** ISEA's Hand Protection Group continued efforts to revise the ANSI/ISEA 105 standard, with a revision scheduled for completion in 2010. A key issue is utilization of a standardized template for cut resistance which will provide a uniform way to rate glove performance.

**Head Protection.** ANSI/ISEA Z89.1-2009, *American National Standard for Industrial Head Protection*, was approved in January. This revision incorporates new optional testing and marking features that respond to user preferences, including high visibility, helmets worn in the reverse position, and testing for helmets used in extreme low temperature environments. Now that the standard is published, ISEA is working to get OSHA acceptance of this revision in its PPE regulations.

**Hearing Protection.** Hearing protection standards fall under the ANSI S12 committee, of which ISEA is a member. In 2009, test methods developed by S12

formed the basis for a rewrite of the EPA hearing protector testing and labeling regulation, proposed in August. At ISEA's request, the agency held a public hearing in October. ISEA testified and submitted written comments on behalf of the Hearing Protection Group, and was later asked to participate in a meeting to make the proposed label more user-friendly.

To ensure that workplace regulation keeps up with the EPA standard, ISEA prodded OSHA to upgrade its noise standard and be ready to implement the new NRR rules when they are completed.

**High Visibility Products.** The market for high-visibility apparel continues to grow, as state and federal regulators adopt requirements that workers wear apparel that complies with ANSI/ISEA 107-2010, *American National Standard for High Visibility Apparel and Headwear*. A revision to this standard was completed at year's end, and was published in early 2010. The revised standard includes optional testing and labeling for high-visibility garments that are flame resistant and garments that are water resistant, water repellent or waterproof. It also includes advisory language on how to determine a garment's service life.

Use of this standard on highways became mandatory when the Federal Highway Administration published a revision of the Manual on Uniform Traffic Control Devices (MUTCD) in late 2009, specifying that anyone working in a right-of-way must be protected by wearing high-visibility apparel that complies with the ANSI/ISEA 107 standard. OSHA also issued an interpretation that it expects all workers, not just flaggers, to have appropriate high-visibility protection.

**Instruments.** ANSI/ISEA 102-1990 (R2009) *American National Standard for Gas Detector Tubes - Short Term Type for Toxic Gases and Vapors in Working Environments* was reaffirmed in February. It provides a means of testing gas detector tubes, and is used for product certification. ANSI/ISEA 104-1998 (R2009) *American National Standard for Air Sampling Devices - Diffusive Type for Gases and Vapors in Working Environments* was also reaffirmed in February. It provides test methods and labeling requirements for passive dosimeters, worn to measure exposure to a variety of contaminants.

The Instruments Group approved a revision to the ISEA "Statement on Validation of Operation for Direct Reading Portable Gas Monitors." This statement provides guidance for users to confirm that a monitor is working properly before each day's use, and is cited by OSHA.

**Protective Apparel.** A draft *Standard for Classification and Performance Requirements for Chemical Protective Clothing*, ISEA 103, underwent revision throughout the year, culminating in consensus approval in October. Ongoing objections from consensus reviewers and comments from the public review resulted in substantive changes to the draft, which will trigger a limited recirculation to the consensus group and public review.

A proposed new standard, *Insulating Apparel Used in Cold Work Environments*, ISEA 201, was approved by consensus stakeholders, but because of the extent of

comments received the standard was scheduled for a second consensus ballot and public review. This standard will provide a rating system to allow users to select clothing that is suitable for use under a variety of cold weather conditions.

**Respiratory Protection.** Because respirators are tested and approved by a government agency, to standards established in regulation, the work of the ISEA Respiratory Protection Group naturally concentrates on NIOSH and its National Personal Protective Technologies Laboratory (NPPTL). In 2009, ISEA submitted comments to NIOSH on its proposed revision to the quality assurance requirements in its respirator certification, and a new Total Inward Leakage (TIL) proposed rule that would impose fit testing as part of the certification process. ISEA testified at public meetings on the QA and TIL rules, participated at other NIOSH manufacturers meetings during the year, and met regularly with senior NIOSH and NPPTL officials.

ISEA's efforts to provide some predictability to the legal climate for respirator manufacturers bore fruit when OSHA published a legal interpretation that NIOSH approval preempts contradictory state court claims. While the ruling was later reversed by the Obama Administration, it underscored the importance of having a single national standard of performance for respirator performance that would not be subject to being modified or contradicted by a court.

Many will remember 2009 as the year of the swine flu. Public health agencies around the world reacted with alarm to the sudden appearance and rapid spread of a new H1N1 virus, which reached pandemic proportions. The pike in demand for filtering facepiece respirators caused spot shortages and manufacturers ramped up production. The Centers for Disease Control and Prevention (CDC) distributed respirators from the Strategic National Stockpile to states, but the system was plagued by a lack of accountability and no reliable measure of the consumption rate. CDC sought the help of ISEA and member manufacturers, and the association played a central role in development of a "dashboard" to track availability of respirators, surgical masks and antiviral drugs nationally. ISEA was also successful in modifying language that had been proposed for a Senate appropriations bill that would have questioned the adequacy of NIOSH-approved respirators for protection against flu and advocated the acceptance of an unproven alternative technology.

**Respiratory Protective Escape Devices.** ANSI/ISEA 110-2009, *American National Standard for Air-Purifying Respiratory Protective Escape Devices*, was approved in June. RPEDs, also known as smoke hoods, provide head, eye and respiratory protection to people while escaping from fire and smoke. The revision updates test methods and provides sizing parameters to fit a greater range of facial shapes.

## GOVERNMENT RELATIONS

A new Administration landed in Washington in 2009, bringing expectations of change in the regulatory agencies important to ISEA. At the Labor Department, the mantra was "there's a new sheriff in town" who would ramp up OSHA enforcement and get the regulatory program rolling. But the agency remained leaderless

much of the year, with assistant secretary for OSHA David Michaels finally confirmed in the last quarter. ISEA had provided the Obama transition team with recommendations for improving OSHA regulations, including a management systems approach to workplace safety and health, data-based decision-making, and reliance on the most recent revisions to consensus standards.

ISEA members occupy a unique position. As manufacturers, they are subject to the regulations that affect all businesses. At the same time, they manufacture and sell equipment that is in some cases mandated by regulation, and in all cases helps users comply with a broad range of regulations and laws affecting the use of safety equipment at work. Naturally, the association maintains close and cooperative working relationships with federal officials from all the agencies whose decisions affect member company products and markets, as well as members of Congress who sit on key committees or represent member company constituencies.

OSHA regulations for personal protective equipment refer to voluntary consensus standards to specify the protection that employers must provide their workers. The agency had proposed to modify these regulations, replacing the references to consensus standards with a vague requirement that products in the workplace meet "good design standards." ISEA had led a broad effort to maintain the references to consensus standards, and in 2009 OSHA agreed, publishing a revised regulation that acknowledged many of the points the association had made. OSHA maintained references to ANSI and ASTM standards, along with a rulemaking process that should simplify updates of the regulation when revised consensus standards are published.

ISEA also petitioned OSHA to ban the use of crystalline silica in sandblasting. The association's position, submitted jointly with the Risk and Insurance Management Society (RIMS) and supported by the American Thoracic Society and the AFL-CIO, is that alternative blasting agents are available that do not create the respiratory hazards of silica. Respirator manufacturers have been targeted in mass silicosis litigation. OSHA denied the ISEA petition, but may still control silica in sandblasting as part of its revision to the silica standard.

An ongoing priority for ISEA has been maintenance of federal funding for firefighter personal protective equipment by the Department of Homeland Security. ISEA works with Congressional committees to secure a reliable funding stream under the federal grant programs. In 2009 these efforts were successful in getting Congress to more than double the Administration's request, but the total appropriation is still less than previous years. ISEA also works to overcome bureaucratic barriers that block the timely granting of funds to local fire departments.

Early in 2009, ISEA informed member that the stimulus legislation contained domestic content restrictions to textile items procured with DHS funds. ISEA brought together member companies and procurement experts to discuss the issue, and crafted comments to the docket expressing member concerns and questions. Through the first months of 2009, ISEA's *Washington Report* provided summaries of the effect of the stimulus legislation on various industries.

Pandemic flu was not just a respirator issue: Protective equipment for health care workers includes gowns, gloves, faceshields, safety glasses and other PPE, and ISEA labored to keep official Washington aware of the need to direct funding toward maintaining stockpiles of protective equipment. This involved meetings with Congressional appropriations and oversight committees, and contacts with the Department of Health and Human Services. ISEA also expressed concern that a liability shield for products released from the Strategic National Stockpile would not apply to identical PPE procured through normal commercial channels.

NIOSH drafted an action plan in 2009 to implement recommendations of a National Academies study for the NIOSH Personal Protective Technologies (PPT) program. ISEA submitted comments, stressing the need to set priorities based on hazards in the workplace and the ability of PPT to mitigate those hazards. The association called on NIOSH to put emphasis on surveillance, to direct its resources to where they can do the most good. ISEA's technical director sat on the National Academies committee evaluating the NIOSH program.

As an association whose membership is global in scope, ISEA keeps members informed of export and trade opportunities, and helps member companies whose products are subject to national security export controls.

## **MARKET INFORMATION AND COMMUNICATIONS**

Member companies in five product categories – eye and face protection, fall protection, head protection, hearing protection and self-contained breathing apparatus – benefit from ISEA market data programs. Participating companies report sales quarterly and receive a confidential summary of the totals, enabling them to compare their companies' performance to the industry. These programs expanded in 2009, with new companies signing up to participate.

ISEA members who subscribe to the Market Intelligence Digest received e-mails every other week, with links to news and feature articles of interest to safety equipment marketers. The free service includes news about PPE manufacturers and products, as well as articles about safety and health at work, regulation and legislation, homeland security, mining and construction, conferences and expositions, and international developments. Members are also able to promote their companies in the quarterly *Protection Update* newsletter published in *EHS Today* magazine, reaching an audience of 86,000 PPE users and safety professionals.

Specific market-focused information is available to ISEA members through the Global Standards Database, and an ISEA report on employment trends in jobs where workers use personal protective equipment.

ISEA participated in several events tied to the PPE marketplace, including a webinar conducted by the economic consulting firm of Frost & Sullivan, a conference sponsored by Roads and Bridges magazine, and an international roundtable hosted by ISEA's counterpart association in Russia, held during the A+A trade show in Düsseldorf, Germany. ISEA also helped NIOSH plan and organize a national "Green Jobs Are Safe Jobs" conference.

## MEETINGS

For 2009, the ISEA annual meeting took on a new form and focus, the “Executive Summit.” Like many other associations, ISEA found that its senior members have less time to devote to industry activities. To preserve the valuable programming provided at the annual meeting, and respect members’ time constraints, the core program was compressed into a noon-to-noon format, with speakers covering the economy, politics, taxes and market opportunities. Sid Ellis of Honeywell was elected chairman of the ISEA Board, and Mitch Lewellen of MCR Safety was elected vice chairman.

The Fall Meeting continues to be ISEA’s largest gathering, with more than a dozen product group and committee meetings, plus presentations by senior NIOSH and OSHA officials, product group chairman reports, and political analysis from *Newsweek’s* Howard Fineman. Ken Brown, the 3M executive who led the effort for high-visibility product standards, was honored as the 2009 recipient of the Robert B. Hurley Distinguished Service Award.

## ADMINISTRATION

ISEA’s staff contracted in 2009 when technical director Janice Bradley resigned to take a position at a larger association. Manager of member and standards services Cristine Fargo stepped in, assuming primary staff responsibility for all product groups, with some of the workload shared with other staff members. The ISEA leadership decided not to fill that position right away, so the staffing needs of the association could be evaluated. The staff reduction also enabled ISEA to propose a second consecutive year without a dues increase, a move that was welcomed by the membership after a tough business year. Funds were put into the budget for contract staff assistance as needed, whether for technical support, communications enhancement or special projects.

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