

## USB Bill Assistance

### Facts About Families Helped by Energy Share with USB funds in 2008-2009

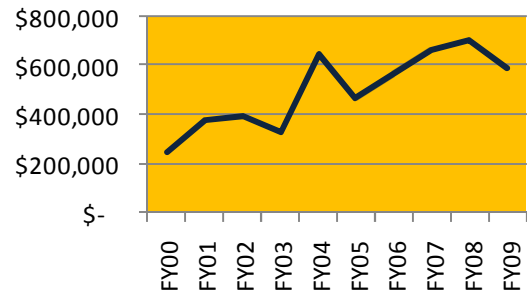
“Universal System Benefits” funds were required by electric and natural gas industry deregulation laws passed by the 1997 Montana Legislature. Some utilities, electric cooperatives and large electric users have contracted with Energy Share to administer low-income bill assistance programs for them.

Dollars in Assistance	\$589,225
Number households helped	1,631
Average assistance/household	\$ 362

### Household (HH) Information

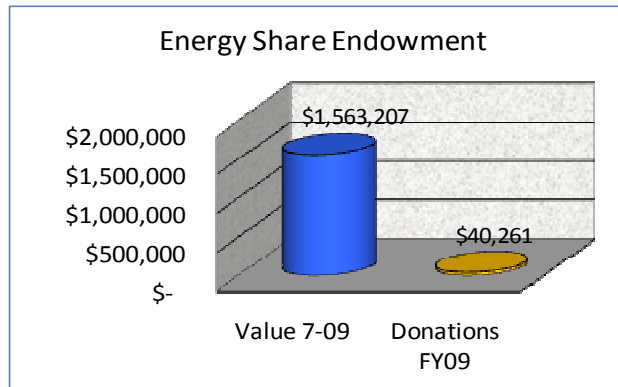
Average Number Occupants/HH	2.6
Number of children 0-18 years old	1,883
Number of people 60+	271

### USB Bill Assistance History



## Endowment

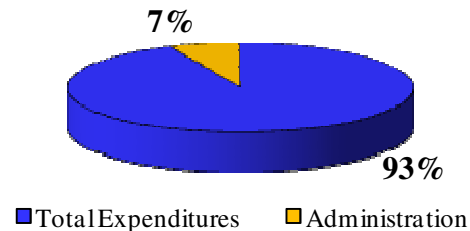
Energy Share’s Endowment is intended to be a permanent funding base for its energy assistance program. Montana law provides a 20 percent tax credit for corporate donations and a 40 percent tax credit for individuals, up to a maximum of \$10,000 Montana tax credit.



## Program Spending

Energy Share continues to keep its administrative costs low while increasing program spending.

### Energy Share Administrative Costs 2008-2009



## 2008-2009 Major Donors

Ash Grove Cement Company  
 Avista  
 Beartooth Electric Cooperative  
 Columbia Falls Aluminum Company  
 ConocoPhillips  
 Cut Bank Gas Company  
 Energy West  
 Fall River Electric Cooperative  
 Fergus Electric Cooperative  
 Flathead Electric Cooperative  
 Glacier Electric Cooperative  
 Graymont  
 Hill County Electric Cooperative  
 Holcim-Trident Plant  
 Lower Yellowstone REA  
 McCone Electric Cooperative  
 Montana-Dakota Utilities  
 Nor-Val Electric Cooperative  
 NorthWestern Energy  
 Pacificorp  
 Park Electric Cooperative  
 Portland General Electric  
 Powder River Corporation  
 PPL Montana  
 Puget Sound Electric  
 Ravalli County Electric Cooperative  
 REC Silicon  
 Rocky Mountain Propane Association  
 Rowe, Bob  
 Sheridan Electric Cooperative  
 Smurfit-Stone Container Corporation  
 Southeast Electric Cooperative  
 Vigilante Electric Cooperative  
 Western Energy Company  
 Yellowstone Valley Electric Cooperative

## Energy Share of Montana

2008-2009

## Annual Report



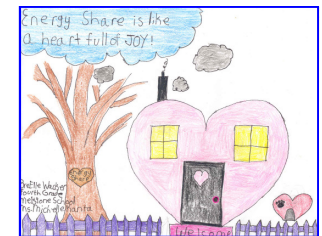
Energy Share of Montana

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Because you care, there's Energy Share!

First place drawing:  
 Annual Fourth Grade Art Contest  
 BreElle Wacker of Melstone, Artist



## About Energy Share

Energy Share of Montana is a private nonprofit organization. Our primary purpose is to help Montanans faced with energy emergencies meet their needs and move towards self-reliance. In the past 26 years Energy Share has distributed 11.5 million dollars in emergency bill assistance to more than 36,500 families. Additionally since 1999 Energy Share has worked with utilities, large electric customers and cooperatives to implement low-income universal system benefits (USB) programs.

## What we do

**Bill Assistance:** One of the chief ways we help people is with their heating bills. Often, families who live from paycheck to paycheck face some type of financial emergency when an unexpected expense occurs.

**Furnace Safety:** Energy West and MDU fund programs for their customers who have unsafe furnaces or water heaters. We have the appliance examined and either repair it if possible, or replace it with a more energy-efficient appliance when necessary.

**Energy Savings Program:** REC Silicon and Smurfit-Stone Container Corporation again teamed up with Energy Share to fund a pilot program to replace refrigerators in the homes of senior citizens ages 60 and above, and disabled folks, who own their homes.

**Weatherization:** Energy West continued funding a weatherization program

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through Energy Share for their customers to maximize energy savings by performing cost-effective weatherization measures in the homes of qualifying Energy West customers.

**Endowment:** In 1997 the Energy Share Board of Directors established an endowment to fund the future heating needs of low-income Montanans.

## Bill Assistance

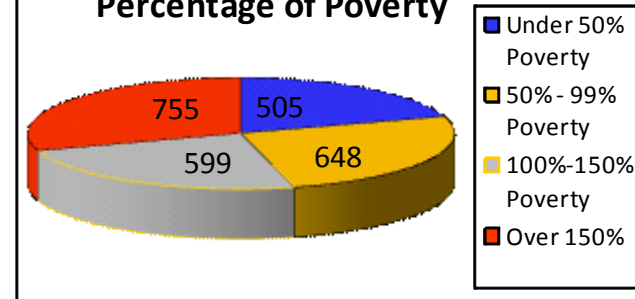
### Facts About Families Helped by Energy Share in 2008-2009

(includes USB figures from the other side)

#### Bill Assistance Facts

Dollars in Assistance	\$977,765
Number households helped	2,507
Average assistance/household	\$ 390

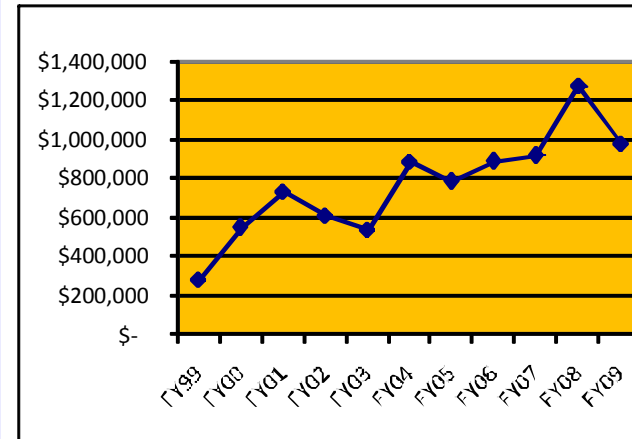
#### Income Information, Percentage of Poverty



#### Household (HH) Information

Average Number Occupants/HH	2.6
Number of children 0-18 years old	2,781
Number of people 60+	432

## Bill Assistance History (last 10 years)

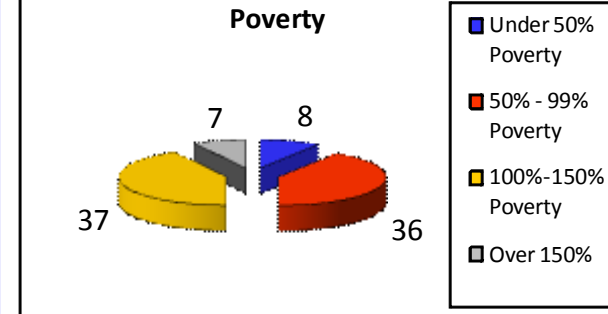


## Furnace Safety

### Furnace Safety Facts

Dollars in Assistance	\$103,524
Number households helped	88
Average assistance/household	\$ 1,176
Number furnace replacements	28
Number furnace tune-ups & cleaning	43
Number water heater replacements	20
Number water heater repair	9

#### Furnace Safety Income, Percentage of Poverty



## Energy Savings Program

In 2008-2009 the Energy Share Board directed some of its endowment earnings to match donations from REC Silicon and Smurfit-Stone Container Corporation for the second year of a refrigerator replacement program for senior citizens and disabled people who own their homes. Below is some data on this valuable program.

No. of Refrigerators replaced	123
Dollars spent in Replacing	\$77,280
Avg. Expenditures/Household	\$ 628
Avg. Savings-Investment Ratio	1.9

## Weatherization

Dollars spent Weatherizing	\$243,023
Number households helped	91
Average expenditures/household	\$ 2,671

The average "Savings-to-Investment Ratio" for the weatherization jobs performed was 2.9. This means that the energy cost savings for the life of the weatherization measures performed exceeded the cost to install the measures by 2.9 times.

Some of the measures included work on walls, outside air infiltration, windows, attic crawl spaces, doors, and heating system repairs to make furnaces more efficient or all together safe.

#### Weatherization Income, Percentage of Poverty

