

USB Bill Assistance

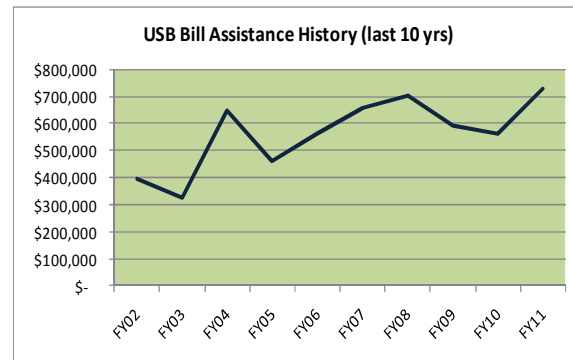
Facts About Families Helped by Energy Share with USB funds in 2010-2011

“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	\$729,980
Number households helped	1,950
Average assistance/household	\$374

Household (HH) Information

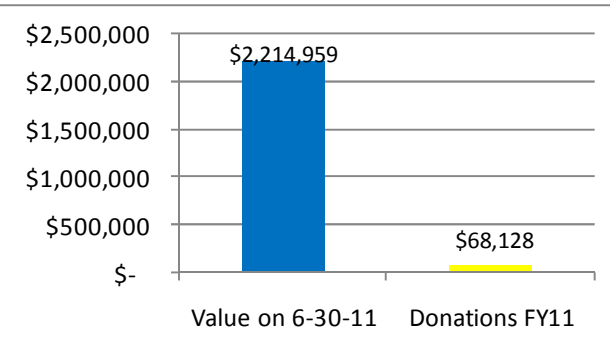
Average Number Occupants/HH	2.6
Number of children 0-18 years old	2,073
% of Households with seniors 60+	15%



Endowment

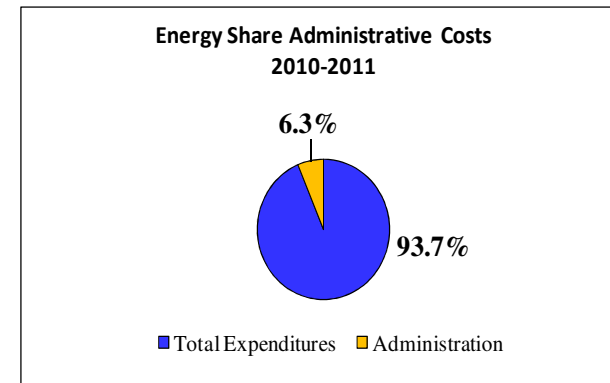
Energy Share’s Endowment is intended to be a permanent funding base for its energy assistance program. Montana law provides a 20 percent tax credit for corporate donations and a 40 percent tax credit for individuals, up to a maximum of \$10,000 Montana tax credit.

Energy Share Endowment



Program Spending

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



2010-2011 Major Corporate Donors (\$1,000 and more)

Avista
 Beartooth Electric Cooperative
 ConocoPhillips
 Cut Bank Gas Company
 Energy West
 Fergus Electric Cooperative
 Flathead Electric Cooperative
 Glacier Electric Cooperative
 Graymont
 Hill County Electric Cooperative
 Lower Yellowstone REA
 McCone Electric Cooperative
 Montana-Dakota Utilities
 NorthWestern Energy
 Pacificorp
 Park Electric Cooperative
 Portland General Electric
 Powder River Corporation
 PPL Montana
 Puget Sound Electric
 Ravalli County Electric Cooperative
 REC Silicon
 Sheridan Electric Cooperative
 Southeast Electric Cooperative
 Smurfit-Stone Container Corporation
 Sun River Electric Cooperative
 Tongue River Electric Cooperative
 Vigilante Electric Cooperative
 Western Energy Company
 Yellowstone Valley Electric Cooperative

Energy Share of Montana

2010-2011

Annual Report

Claudia Rapkoch, Board President
 Rachel Haberman, Executive Director



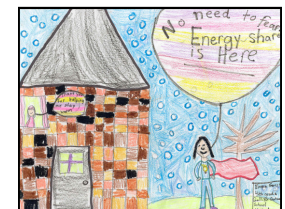
Energy Share of Montana

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Because you care, there's Energy Share!

First place drawing:
 Annual Fourth Grade Art Contest
 Emma Guest of Gallatin Gateway, 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 28 years Energy Share has distributed 13.4 million dollars in emergency bill assistance to more than 41,000 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: Using earnings from the Endowment, Energy Share matched previous years' donations from REC Silicon and Smurfit-Stone Container Corporation to fund a 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

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

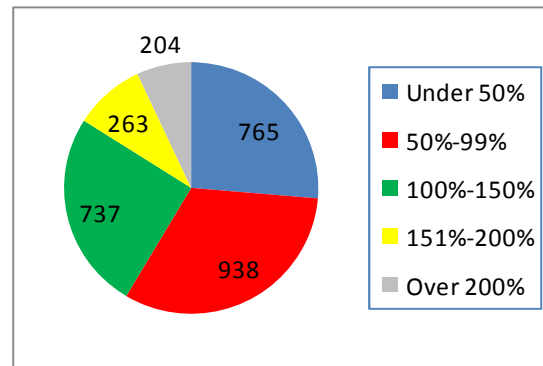
Facts About Families Helped by Energy Share in 2010-2011

(includes USB figures from the other side)

Bill Assistance Facts

Dollars in Assistance	\$1,073,216
Number households helped	2,907
Average assistance/household	\$369

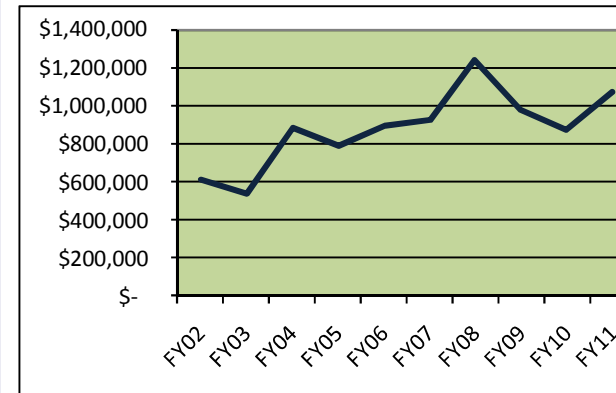
Income Information, Percentage of Poverty



Household (HH) Information

Average Number Occupants/HH	2.6
Number of children 0-18 years old	3,133
% of households w/ seniors 60+	16%

Bill Assistance History (last 10 years)

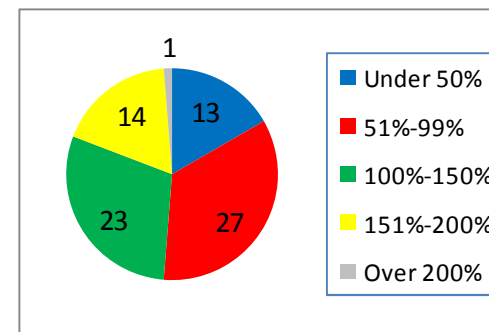


Furnace Safety

Furnace Safety Facts

Dollars in Assistance	\$126,755
Number households helped	78
Average assistance/household	\$1,625
Number furnace replacements	38
Number furnace tune-ups & cleaning	31
Number water heater replacements	17
Number water heater repairs	9

Income Information, Percentage of Poverty



Energy Savings Program

In 2010-2011 the Energy Share Board directed some of its endowment earnings to match previous years' donations from REC Silicon and Smurfit-Stone Container Corporation for the fourth 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	65
Dollars spent in Replacing	\$37,995
Avg. Expenditures/Household	\$585
Avg. Savings-Investment Ratio	1.9

Weatherization

Dollars spent Weatherizing	\$173,913
Number households helped	50
Average expenditures/household	\$3,478

The average "Savings-to-Investment Ratio" for the weatherization jobs performed was 1.9. This means that the energy cost savings for the life of the weatherization measures performed exceeded the cost to install the measures by 1.9 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.

Income Information, Percentage of Poverty

