

## USB Bill Assistance

“Universal Systems Benefits” funds were required by electric and natural gas industry deregulation laws passed by the 1997 Montana Legislature. USB provides funding for certain public purposes, including low-income programs.

Some utility companies, electric cooperatives and large electric users have agreements with Energy Share to administer USB-funded programs for them. This includes contributions for bill assistance, the endowment and cost-effective energy savings programs.

### USB Bill Assistance Facts, 2019-2020

Dollars of Assistance	\$583,655
Avg. Assistance/Household	\$ 345
Number of Households Helped	1,690
Number of Children 0-18 Yrs. Old	1,782
Percent of Households w/ Seniors	25%
Avg. Number Occupants/Household	2.4



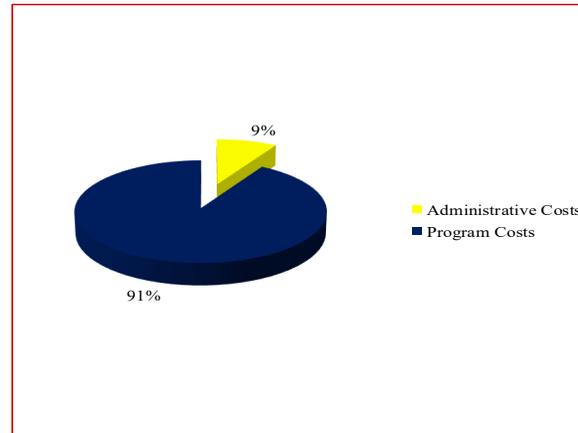
*A single woman was unable to work. One of her children passed away due to a serious illness. Right then her rent went up and she fell behind on all her bills, having to pick and choose which ones to pay. In desperation she asked for and received help from Energy Share. Because of your support, this struggling family was able to keep their heat on.*

**Thank you!**

## Keeping Costs Down

Energy Share continues to keep administrative costs low while operating programs at a consistently high level.

### Administrative Costs 2019-2020



## Annual Fourth Grade Art Contest

Every year Energy Share sponsors a fourth grade art contest and places the winning drawing on the front of our thank you cards. During the course of the contest, teachers and students also have the opportunity to hear about why Energy Share exists and what the need is in Montana. The winning drawing for the 2019—2020 year is on the front cover of this report. Nolan Lippy of Florence won first place with his creative illustration of how Energy Share helps people.

### How to Donate to Energy Share:

- ◆ Contact your accountant about tax advantages for endowment donations;
- ◆ Donate online at [www.energysharemt.com](http://www.energysharemt.com); or
- ◆ Mail donation to the address on the front of this report.

*Energy Share is a 501(c)(3) organization. Donations are tax-deductible.*

## 2019-2020 Major Corporate Donors (\$1,000 and more)

Ash Grove Cement Company  
 Avista  
 Barrick Golden Sunlight Mines  
 Cut Bank Gas Company  
 Energy West Montana  
 Fergus Electric Cooperative  
 First Interstate Bank  
 Flathead Electric Cooperative  
 Glacier Electric Cooperative  
 Goldenwest Electric Cooperative  
 Hill County Electric Cooperative  
 Human Resource Development Councils  
 McCone Electric Cooperative  
 Missoula Electric Cooperative  
 Montana Broadcasters' Association  
 Montana-Dakota Utilities  
 Montana Electric Cooperatives' Association  
 NorthWestern Energy  
 PacifiCorp  
 Park Electric Cooperative  
 Portland General Electric  
 Powder River Corporation  
 Puget Sound Energy  
 Ravalli Electric Cooperative  
 REC Silicon  
 Rocky Mountain Propane Assoc.  
 Sheridan Electric Cooperative  
 Sibanye Stillwater  
 Southeast Electric Cooperative  
 Talen Energy  
 Tongue River Electric Cooperative  
 Vigilante Electric Cooperative  
 Westmoreland Mining Company  
 Yellowstone Valley Electric Cooperative

## Energy Share of Montana

2019-2020  
 ANNUAL REPORT

Tony Flynn, FY20 Board President  
 Rachel Haberman, Executive Director



Artist: Nolan Lippy, Florence

**BECAUSE YOU CARE THERE'S ENERGY SHARE**



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## About Energy Share

Energy Share of Montana is a private non-profit organization whose primary purpose is to help Montanans faced with energy emergencies meet their needs and move towards self-reliance. In the past 37 years, Energy Share has distributed \$22.3 million in emergency bill assistance to 64,900 families. Energy Share has worked with utilities, large electric customers and cooperatives since 1999 to implement low-income universal system benefits (USB) programs.

### Bill Assistance

Often, your neighbors experience a financial emergency when an unexpected expense occurs and they are unable to pay their home energy bill(s). By donating to Energy Share you help them stay warm. When an application is approved, payment is made directly to the energy provider on behalf of the client.

Energy Share contracts with the ten Human Resource Development Councils (HRDCs) around the state to distribute funds. Each HRDC coordinates a local Energy Share committee made up of volunteers representing various community sectors. The HRDCs and committee members work within contractual guidelines to award assistance, ensuring attention is given to the applicants' individual circumstances.

#### *Bill Assistance Facts, 2019-2020* (includes USB figures from the other side)

Dollars of Assistance	\$790,931
Avg. Assistance/Household	\$ 374
Number of Households Helped	2,112
Number of Children 0-18 Yrs. Old	2,181
Percent of Households w/ Seniors	26%
Avg. Number Occupants/Household	2.4

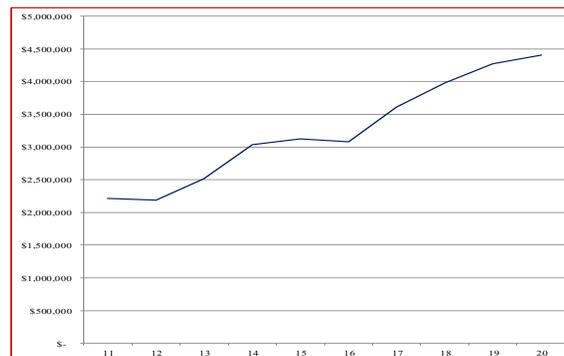
*An elderly woman with terrible back problems had to climb several flights of stairs to reach her apartment, causing excruciating pain. Under doctor's orders to keep away from stairs, she finally found another place to live. Her only income being SSI, with the extra cost of moving she needed help paying her utility bill. Because of your support of Energy Share, we were able to help her.*

**Thank you!**

### Endowment

In 1997 the Energy Share Board of Directors established an endowment to fund the future heating needs of low-income Montanans. The endowment is intended to be a permanent funding base for its energy assistance program. Corporations contribute to the well-being of their communities by making donations to the endowment. Montana law provides for a 20 percent tax credit for corporate donations and a 40 percent tax credit for individuals. The maximum credit that may be claimed by a taxpayer for contributions made from all sources in a year is \$10,000.

#### Market Value of Endowment



### Energy Savings Program

Using earnings from the endowment, Energy Share funds a cost-effective program to replace old, inefficient refrigerators with energy-efficient models for qualified senior citizens and disabled people who own their homes. This program also replaces non-working water heaters in certain situations, resulting in energy savings.

#### *ESP Facts, 2019-2020*

Dollars Spent Replacing	\$16,589
Avg. Annual Savings	\$ 153
Avg. Savings-to-Investment Ratio-Refrig.*	2.3
Total Number of Households Helped	19

### Furnace and Water Heater Safety and Efficiency

Energy West and Montana-Dakota Utilities fund programs for their customers who have unsafe furnaces or water heaters. We examine the appliance and repair it if possible, or replace it with a more energy-efficient model when necessary.

#### *Furnace Safety Facts, 2019-2020*

Dollars of Assistance	\$108,364
Avg. Assistance/Household	\$ 1,837
Number of Households Helped	59
Number of Furnace Replacements	14
Number of Furnace Tune-ups/Repairs	38
Number of Water Heater Replacements	13
Number of Water Heater Repairs	16

\*Savings-to-Investment-Ratio (SIR) means that the energy cost savings for the life of the energy conservation measures performed exceeded the cost to install the measures by 2.3 times.

### Weatherization

Energy West and Montana-Dakota Utilities fund a weatherization program through Energy Share for their customers to maximize savings by performing cost-effective weatherization measures in the homes of qualifying customers. Additionally, this year Energy Share piloted a supplemental Weatherization program that co-funds the cost of installing some measures and resulted in additional energy savings.

Some of the energy conservation measures undertaken by these programs include work on walls, outside air infiltration, windows, attics, crawl spaces, doors, and heating system repairs to make furnaces more efficient or altogether safe.

#### *Weatherization Facts, 2019-2020*

Dollars Spent Weatherizing	\$223,516
Average Annual Savings	\$ 316
Average Savings-to-Investment Ratio*	2.3
Number of Households Helped	71



*Men and women in our armed forces sacrifice so much for their country, and now your donations to Energy Share have helped a veteran in transition. After dealing with some issues and receiving treatment, she sought to re-establish herself in the community. Short on funds in that process, she applied for and received Energy Share assistance. **Thank you** for giving back to someone who has done so much for our country!*