

USB Bill Assistance

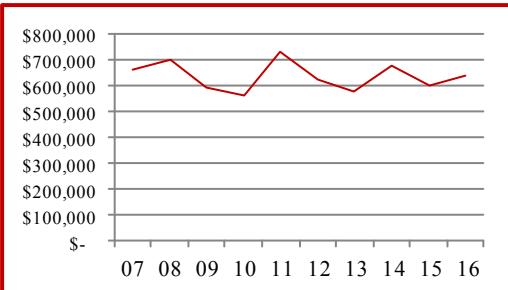
“Universal Systems Benefits” funds were required by electric and natural gas industry de-regulation laws passed by the 1997 Montana Legislature. USB provides funding for certain public purposes, including some low-income programs.

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, 2015-2016

Dollars of Assistance	\$639,156
Avg. Assistance/Household	361
Number of Households Helped	1,771
Number of Children 0-18 Yrs. Old	1,925
Percent of Households w/ Seniors	20%
Avg. Number Occupants/Household	2.5

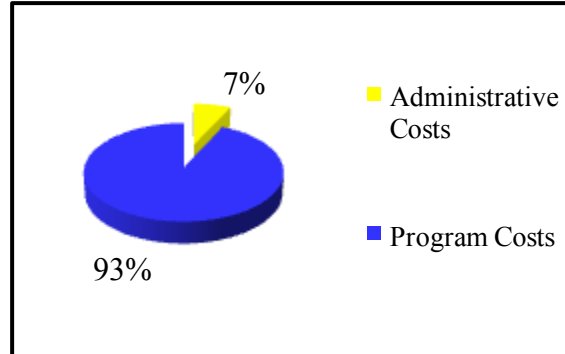
USB Bill Assistance History (Last 10 Fiscal Years)



Keeping Costs Down

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

Administrative Costs 2015-2016



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 2015—2016 year is on the front cover of this report. Jazlynn Standing Rock of Box Elder won first place with her graphic depiction: “When winter is in the air Energy Share is there.”

How to Donate to Energy Share:

- ◇ Contact your accountant about tax advantages for endowment donations;
- ◇ Donate online at 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.

2015-2016 Major Corporate Donors (\$1,000 and more)

Ash Grove Cement Company
 Avista
 Calumet Montana Refining Company
 Cut Bank Gas Company
 Energy West
 Fergus Electric Cooperative
 Flathead Electric Cooperative
 Glacier Electric Cooperative
 Hill County Electric Cooperative
 Invenergy Wind Finance Co., LLC (Judith Gap Wind Farm)
 Lower Yellowstone REA
 McCone Electric Cooperative
 Missoula Electric Cooperative
 Montana-Dakota Utilities
 NorthWestern Energy
 PacifiCorp
 Park Electric Cooperative
 Phillips 66
 Portland General Electric
 Powder River Corporation
 Puget Sound Energy
 Ravalli County Electric Cooperative
 REC Silicon
 Rocky Mountain Propane Assoc.
 Sheridan Electric Cooperative
 Southeast Electric Cooperative
 Stillwater Mining Company
 Talen Energy
 Tongue River Electric Cooperative
 Vigilante Electric Cooperative

Energy Share of Montana

2015-2016 Annual Report

Tina Shorten, FY16 Board President
 Rachel Haberman, Executive Director



Artist: Jazlynn Standing Rock, Box Elder

BECAUSE YOU CARE THERE'S ENERGY SHARE



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 406-442-4900 or 1-888-779-7589
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About Energy Share

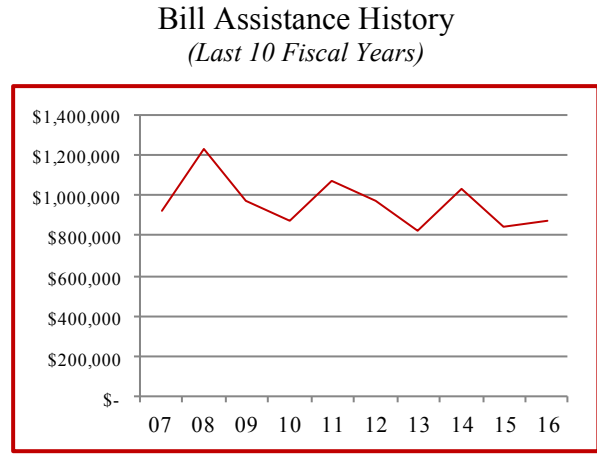
Energy Share of Montana is a private nonprofit organization whose primary purpose is to help Montanans faced with energy emergencies meet their needs and move towards self-reliance. In the past 33 years, Energy Share has distributed \$18 million in emergency bill assistance to more than 54,000 families. 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.

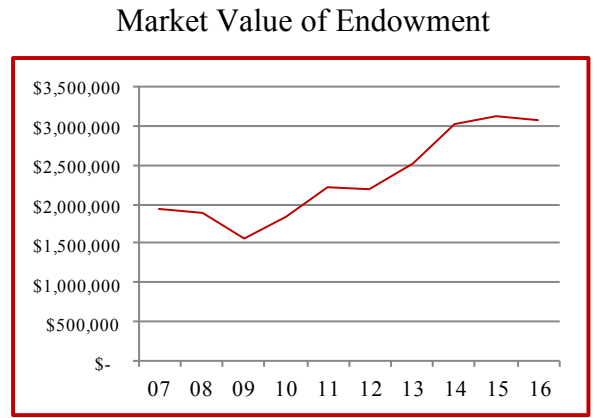
Energy Share contracts with the ten Human Resource Development Councils (HRDCs) around the state to distribute funds. Each HRDC coordinates a local Energy Share committee made up of volunteers representing various community sectors. The HRDCs and committee members work within contractual guidelines to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

Dollars of Assistance	\$872,049
Avg. Assistance/Household	376
Number of Households Helped	2,321
Number of Children 0-18 Yrs. Old	2,518
Percent of Households w/ Seniors	20%
Avg. Number Occupants/Household	2.5



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, up to a maximum of \$10,000 Montana tax credit.



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.

ESP Facts, 2015-2016

Dollars Spent Replacing	\$23,783
Average Annual Savings on Energy Bills	113
Number of Households Helped	33
Average Savings-to-Investment Ratio*	1.9

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, 2015-2016

Dollars of Assistance	\$188,857
Avg. Assistance/Household	1,548
Number of Households Helped	122
Number of Furnace Replacements	43
Number of Furnace Tune-ups/Repairs	54
Number of Water Heater Replacements	38
Number of Water Heater Repairs	15

*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 1.9 (refrigerator replacement) or 2.1 (weatherization) times.

Weatherization

Energy West and Montana-Dakota Utilities fund a weatherization program through Energy Share for their customers to maximize energy savings by performing cost-effective weatherization measures in the homes of qualifying customers.

Some of the energy conservation measures undertaken by this program 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, 2015-2016

Dollars Spent Weatherizing	\$284,847
Number of Households Helped	92
Average Savings-to-Investment Ratio*	2.1



An older couple was experiencing major health issues. He had a heart attack and later ended up back in ICU with pneumonia. She had a knee replacement and was temporarily unable to work. Your donations to Energy Share helped them stay warm during this rough time. Thank you!