

USB Bill Assistance

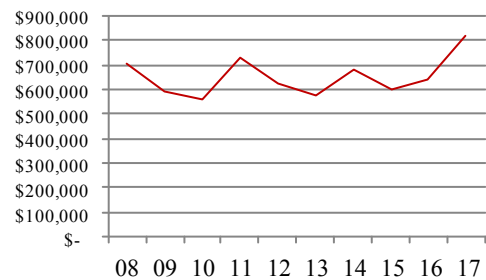
“Universal Systems Benefits” funds were required by electric and natural gas industry de-regulation laws passed by the 1997 Montana Legislature. USB provides funding for certain public purposes, including some low-income programs.

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, 2016-2017

Dollars of Assistance	\$822,855
Avg. Assistance/Household	389
Number of Households Helped	2,189
Number of Children 0-18 Yrs. Old	2,472
Percent of Households w/ Seniors	21%
Avg. Number Occupants/Household	2.6

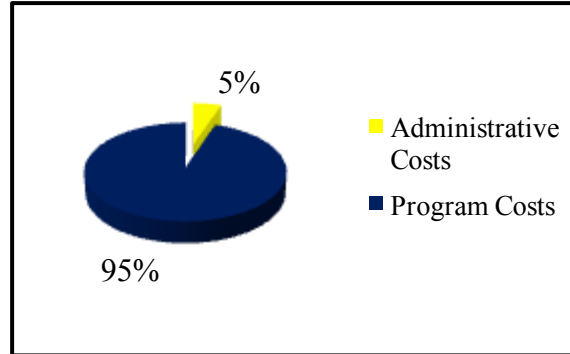
USB Bill Assistance History (Last 10 Fiscal Years)



Keeping Costs Down

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

Administrative Costs 2016-2017



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 2016—2017 year is on the front cover of this report. Taven Otteson of Florence won first place with his graphic depiction: “No fear, Energy Share is here!”

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.

2016-2017 Major Corporate Donors (\$1,000 and more)

Ash Grove Cement Company
 Avista
 Cut Bank Gas Company
 Energy West
 Fergus Electric Cooperative
 Flathead Electric Cooperative
 Glacier Electric Cooperative
 Goldenwest Electric Cooperative
 Graymont
 Hill County Electric Cooperative
 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 Power
 Rocky Mountain Propane Assoc.
 Sheridan Electric Cooperative
 Southeast Electric Cooperative
 Stillwater Mining Company
 Talen Energy
 Vigilante Electric Cooperative
 Yellowstone Valley Electric Cooperative

Energy Share of Montana

2016-2017 Annual Report

Greg Jergeson, FY17 Board President
 Rachel Haberman, Executive Director



Artist: Taven Otteson, Florence

BECAUSE YOU CARE THERE'S ENERGY SHARE



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 406-442-4900 or 1-888-779-7589
www.energyssharemt.com



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 34 years, Energy Share has distributed \$19 million in emergency bill assistance to nearly 57,000 families. Energy Share has worked with utilities, large electric customers and cooperatives since 1999 to implement low-income universal system benefits (USB) programs.

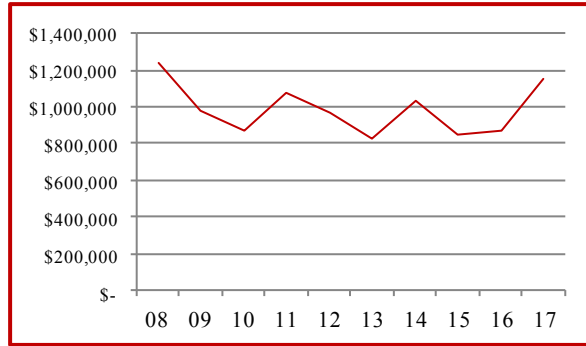
Bill Assistance

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	\$1,154,590
Avg. Assistance/Household	389
Number of Households Helped	2,971
Number of Children 0-18 Yrs. Old	3,258
Percent of Households w/ Seniors	22%
Avg. Number Occupants/Household	2.6

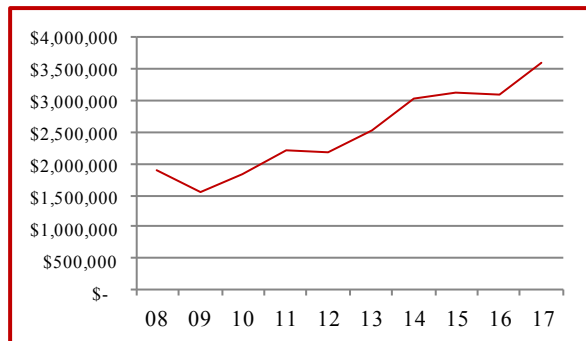
Bill Assistance History
(Last 10 Fiscal Years)



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.

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.

Dollars Spent Replacing	\$25,309
Avg. Annual Savings	176
Avg. Savings-to-Investment Ratio-Refrig.*	3
Total Number of Households Helped	33

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.

Dollars of Assistance	\$152,575
Avg. Assistance/Household	1,861
Number of Households Helped	82
Number of Furnace Replacements	23
Number of Furnace Tune-ups/Repairs	43
Number of Water Heater Replacements	32
Number of Water Heater Repairs	14

*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 3.0 (refrigerator replacement) or 1.9 (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.

Dollars Spent Weatherizing	\$297,945
Number of Households Helped	101
Average Savings-to-Investment Ratio*	1.9
Total Annual Savings	\$25,137



A Mom of two became suddenly and tragically widowed. Her husband had not had health insurance, so his hospital stay before his death resulted in huge medical bills. Your donations to Energy Share helped this family stay warm during this rough time.
Thank you!