



Annual Report 2019 - 2020

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From the President



Steve Kaminski *President & CEO* NPGA

Needless to say, I didn't expect my first year with NPGA to be one of the most taxing experiences our planet has faced in a century. COVID-19 continues to challenge our public health and economic systems in a profound manner and it has tried propane businesses in ways perhaps never before imagined—leak checks and installations in a virus-laden and social distanced world, a dearth of personal protective equipment, dozens of new rules and regulations to navigate without consistency from locality to locality, and questions abound about how to handle employees and customers who have contracted COVID-19. Perhaps even more crucial is the fear it casts in all of us—fear of losing a loved one and fear of losing our job and savings. Sadly, some of those fears are being realized and now, as we crawl towards recovery, each of us—with our families, our colleagues, and our fellow Americans—must muster the fortitude to plow forward.

By working so closely with many of you through these uncharted waters, I have come to respect greatly not only the incredibly dedicated and compassionate members of the propane family, but also the energy itself—for what propane is now and what it can be to America. The pandemic reinforced what we as an industry have always known—that propane is a reliable and resilient fuel that will provide safe and clean energy no matter the emergency, and how vital it is that our country's propane supply is not dependent on foreign production.

My approach to guiding NPGA is based on servant leadership: membership directs NPGA, not the other way around. Accordingly, we will always listen to what you—our members—need and your feedback is of paramount importance to us. In return, we will endeavor to provide you with the utmost transparency and copious communications. That said, I do not equate a servant mentality with weakness; just the opposite. NPGA is your army to tackle the matters most pressing to the industry, both as the strategists as well as the foot soldiers. While NPGA has a mission statement, strategic goals, and a wealth of incredible policies, our role boils down to just a handful of things: Eliminate governmental roadblocks, facilitate cooperation, and provide tools to help your businesses thrive.

Unlike the pandemic, I did walk into NPGA recognizing that we are facing another incredible challenge: misinformation about electricity as the only solution to climate change. It's driving misperception, which is leading to flawed policies, including to the detriment of propane. Hundreds of bills have been introduced around the country demanding gas bans or decarbonization or net-zero (or a myriad of other government-coined terms that anoint electricity as the climate change savior). NPGA—along with allies at PERC, the state associations, the natural gas associations, and many other like-minded partners—is fighting back hard, both in town halls and policymaker offices as well as on the streets with vote-casting consumers.

This boxing match will not go one round, or two, or perhaps even ten; rather it may rage on until the universal consensus backs propane as a critical energy solution, as a necessary complement to other energy sources, or as it can be used in less traditional methods. We all know that the vilification of propane makes about as much sense as why boxing "rings" are square, but perception, once cemented, is no easy feat to turn on its head in a social environment where facts are secondary to armchair wisdom.



So once the pandemic is bested and we all learn what "the new normal" looks like, I'd challenge you to think about what else can be done—both by you as a member of the propane community and by all of us collectively as an association of members—to thrive over the next decade and beyond. I challenged myself in this manner and see four principal areas, or "pillars," where we can collectively, and independently, focus our efforts: Safety, Professionalism, Innovation, and Attractiveness to Industry.

Safety. Safety is "Job Number 1" for many and, perhaps, should be for all. An incident mars the reputation of not just one business, but also of the industry and propane as an energy source. Nuclear power has never recovered. And it's the right thing to do. Ensuring the safety of customers and employees is a no-brainer, but that doesn't make it easy to do, day in and day out.

Professionalism. Professionalism is critical to establish and maintain confidence in the output we all work so hard to earn. How often do you ask yourself the following: Does my company have adequate levels of support in human resources, legal, and accounting? Is our customer service top notch? Is our training up to snuff? Do we take pride in the condition of our plants and facilities? Are we contracting to meet our customers' needs? Is our workforce diversifying across gender, age, and racial spaces? Are we investing in sustainable resources like propane-powered bobtails?

Innovation. Back in February, the World LPG Association held a summit it titled "Innovate or Die." I wasn't a fan of title, but the spirit of the message is pertinent—we continually must challenge ourselves to align our product with the needs and concerns of today's society. Certainly, that requires relentless education of the public and of policymakers around how clean, powerful, and cost-effective our fuel is. Another piece is incentivizing innovators to innovate—through research grants, policy incentives, and sheer brute entrepreneurialism—around how propane can adapt to an ever-adapting society.

Attractiveness to Industry. Messaging that propane is an energy of the future to policymakers and the public is only half the battle. The other half is gaining market share through manufacturers. They must buy into propane as an energy source that will produce dollars to incentivize the development of new products, cleaner products, more efficient products, and more powerful products, all using propane.

We are not as small of an industry as we sometimes tell ourselves. You have NPGA and PERC which are armed with sophisticated staff and are tackling obstacles arm-in-arm alongside a committed cadre of state executives across our great nation. And most of all, we have you, with the ingenuity, grit, and drive to stand up proudly and loudly declare that propane can and should be energizing America.

From the Chair





Randy Thompson Chair of the Board **NPGA**

What a difference a year makes...

NPGA is operating under a new CEO, Steve Kaminski, who started in late October. Under Steve's leadership, NPGA quickly jumped in to provide guidance and regulatory support to the industry around business operations during the COVID-19 crisis. The COVID-19 crisis has highlighted the strong, collaborative relationship between NPGA and PERC; the evolution of the relationship has provided substantial value to the industry as we navigate uncharted waters.

In late 2019, the NPGA advocacy team achieved a significant win -\$500 million dollars in retroactive tax credits under the Alternative Fuel Vehicle Refueling Property Tax Credit, which will be of sizeable benefit to the industry.

Every other Friday, the NPGA Board Officers meet via conference call. And I am happy to report, it is the consensus of the officers that NPGA is moving in the right direction. Fighting the Electrification of Everything Movement and maintaining energy choice means 2020-2021 is going to be another busy year and I look forward to working with you.

"...NPGA is moving in the right direction."

COVID-19—NPGA Responds

COVID-19 hit the nation hard and it's changed the way we live and do business. NPGA acted quickly and comprehensively on behalf of the propane industry. Below is a subset of NPGA's actions and accomplishments in responding to the pandemic.

- Secured essential critical infrastructure worker status for propane workers from the Department of Homeland Security, which many states adopted.
- Secured inclusion of propane in the Federal Motor Carrier Safety Administration's emergency declaration waiving hours of service requirements for the transportation of essential supplies supporting emergency relief efforts.
- Loosened red tape and secured waivers for the propane industry on matters relating to drug and alcohol testing, CDL-related matters, and hazardous materials-related requirements.
- Secured a favorable outcome for the propane industry in the federal government's third stimulus package, including an additional \$900 million in funding for the Low Income Energy Assistance Program (LIHEAP).
- Designed "rules of the road" for NPGA members under dozens of governmental acts and guidance documents, including CDC and OSHA guidance, the Federal Paycheck Protection Program and myriad other new financial assistance programs, and provisions related to paid sick leave, extended family leave, and medical leave.
- Worked to provision cloth masks through FEMA at no charge for essential propane workers (over 57,000 masks to over 1,200 locations requested) and with NPGA member Rototherm to facilitate the availability of PPE facemasks to the United States propane industry.

These actions supported the industry's resilience, allowing propane to maintain up and running status and continue to provide most services to the customer base. But it is certainly not business as usual. There are a number of technical resources, references, and template language on the Member Dashboard of NPGA.org to help navigate the new environment in which we find ourselves operating. The NPGA staff are also resources for you; feel free to reach out to them with questions or concerns.

NPGA COVID-19 Resources on NPGA.org Member Dashboard

- State Operating Status
- Federal Enforcement Discretion and Regulatory Guidance (DOT, FMCSA, TSA and PHMSA)
- Funding Resources Portal
- Marketers Guides for COVID-19 Operations
- Event Cancellation Template
- Preventative Practices Memo Template
- Workplace Exposure Notice Template
- Identification of Essential Critical Infrastructure Workers Guide
- Critical Industry Employee Authorization to Travel Templates
- Paid Leave Guidance
- LIHEAP Summary
- LIHEAP Customer Mailer

"We are living in difficult times. The COVID-19 crisis has created unprecedented health, safety, and economic challenges for the propane industry and our families. It has put



all of us in new territory with many unknowns and difficult decisions that must be made each day."

- Randy Thompson, NPGA Chair of the Board

Regulatory

Regulatory Reform

NPGA regulatory reform initiatives aim to eliminate hurdles for the industry, specifically regulations by the U.S. Department of Transportation (DOT) and the U.S. Department of Housing & Urban Development (HUD). NPGA continues to pursue Hours of Service reform at DOT, including building broad support for the expansion of the 100 air-mile radius provision of the short-haul operation regulation among a variety of industries that rely on over-the-road transportation. DOT's pending rulemaking to modify the short-haul operation exemption will enable propane technicians to service more deliveries with greater flexibility.

NPGA successfully advocated to update an underlying HUD regulation to defer to NFPA 58 standards for separation distances between propane tanks and structures. The outdated regulation rendered residential properties within 300 feet of a 1,000-gallon propane tank ineligible for Federal Housing Administration-backed loans, which are common among first-time homebuyers. Further, the regulation deterred residential developers from partnering with propane marketers in the construction of propane community systems. Ultimately, HUD changed the regulation to exclude all underground propane tanks; exclude aboveground propane tanks of 1,000 gallons or less, if they comply with NFPA 58, and incorporate NFPA 58 standards.

Advocating with States

NPGA's regulatory advocacy team partnered with state and regional associations to eliminate regulatory barriers at the state level. NPGA and the Ohio Propane Gas Association appealed to the Federal Motor Carrier Safety Administration (FMCSA) to waive the mandatory skills assessment of the commercial driver license test for military veterans who received vehicle training during military service. We urged FMCSA to grant the waiver to the Ohio Department of Public Safety as well as all states to reduce barriers to employment of military service individuals and improve the pool of potential commercial vehicle drivers.







NPGA partnered with the Pacific Propane Gas Association, asking FMCSA to make a preemption determination on Washington meal and rest break hours of service regulations. We argued that the Washington rules present no additional safety benefit and are incompatible with the hours of service rules put forth by FMCSA. Further, the Washington rules cause an unreasonable burden on interstate commerce, including contributing to a cumulative effect in conjunction with similar state regulations that burden interstate commerce. More than 500 propane field technicians with commercial driver licenses deliver propane to nearly 84,000 homes in Washington, and the Washington rules are hurdles to the efficient and safe transportation of propane.

Harvest Demand

A wet spring and late, rapid fall harvest caused significant demand for propane to fuel corn dryers throughout the Midwest. NPGA joined state and regional associations in coordinated response and communication among propane marketers, farmers, state and federal officials, and other organizations. NPGA served as a central information hub for federal regulatory agencies such as the Federal Energy Regulatory Commission (FERC) and FMCSA as well as communicating with congressional offices.

To continue open dialogue with the agricultural community, NPGA participated in a policy conference with the Midwestern Association of State Departments of Agriculture. NPGA provided an overview of the well-to-wheel propane delivery path and the modes of transportation involved, including pipeline, rail, and transport and bobtail vehicles. In particular, NPGA was able to answer questions on pipeline allocation policies and the subsequent impact of portioning supplies among propane marketers that purchase product from wholesale or midstream operations. NPGA also discussed the high daily use of propane by corn dryers in comparison to residential or commercial consumers to illustrate the sheer magnitude of agricultural demand and the limitations of transportation resources. Several agricultural commissioners commented that the agriculture and propane industries must continue to communicate on anticipated demand, harvest timing, and storage capacities as well as investigate ways to reduce cost and other barriers to on-site storage.







Legislative Affairs

New Congressional Member Outreach

The 2018 elections marked a considerable change in the political landscape and required a shift in NPGA's legislative priorities for the 116th Congress. The new Congress included over 100 new legislators, and a new Democratic Majority in the House of Representatives. During the first 90 days of 2019, NPGA met with over 100 Congressional offices, specifically targeting key states and districts with propane interests. NPGA worked to educate these Members and their staff on the essential benefits of propane. These new relationships served as the foundation for NPGA's advocacy throughout 2019 and into 2020.

Alternative Fuel Tax Credit

Last year, NPGA worked with Congressional leaders to promote the extension of expired alternative fuel tax credits. These credits, which play an integral role in incentivizing Americans to adopt alternative fuels, were the subject of multiple Congressional hearings and were later incorporated into legislative text in the House of Representatives and the Senate. In late December of 2019, President Trump signed into law H.R. 1865, which included a three-year extension of the Alternative Fuel Tax Credit and the Alternative Fuel Vehicle Refueling Property Credit. These credits can now be claimed retroactively for years 2018-2019, and prospectively for 2020. NPGA continues to advocate for a long-term extension of the alternative fuel credits, beyond 2020, which will give the propane industry and its customers the certainty they need to expand the autogas market.

Appropriations Requests

In early 2019, NPGA sought changes to F.Y. 2020 Appropriations language that would request research, development, and demonstration (RD&D) funding opportunities for propane through the U.S. Department of Energy. These appropriation dollars provide a unique opportunity to fund essential programs that assist in modernizing the propane industry. In late December of 2019, President Trump signed into law H.R. 1865, which included RD&D funding opportunities. The bill makes available \$5,000,000 for propane vehicle engine technology projects, and grants propane and natural gas companies access to \$15,000,000 for combined heat and power projects. NPGA is excited to continue working with House and Senate appropriators to expand requests for F.Y. 2021.





State Engagement Initiative

The state affairs program coordinates with the 38 state and regional propane associations and industry leaders across the country to defend against harmful legislative or regulatory proposals that could have a domino effect across the country. In 2019, NPGA's state affairs program analyzed more than 10,000 bills, actively monitoring more than 700 that offered opportunities or challenges to the industry.

To complement the legislative monitoring effort, in 2015 NPGA's Executive Committee committed up to \$500,000 for the State Engagement Initiative to provide necessary resources to protect the industry. Since that time, the propane industry has achieved significant victories, primarily over subsidized natural gas proposals in the legislative and regulatory arenas. Funds have been used to assist the propane gas associations in Illinois, Maryland, Michigan, Minnesota, New Mexico, North Carolina, Texas, and West Virginia. In 2019, funds were allocated to the Propane Gas Association of New England and Western Propane Gas Association to challenge decarbonization efforts.

The industry's primary challenge has shifted from subsidized natural gas expansion to fighting proposals on both the state and local level to curtail or eliminate the use of fossil fuels, including the elimination of internal combustion engines and efforts to limit infrastructure development. In 2020, resources will be deployed for state and regional associations to challenge these proposals.



Codes & Standards

NPGA's Technology, Standards and Safety (TS&S) Committee met for its traditional Fall and Spring meetings to focus on improving the codes and standards that affect propane company operations throughout the United States. NFPA 58, the LP-Gas Code, is without a doubt the preeminent standard used not only in the U.S. but also throughout the world. This standard is adopted in virtually every state either outright or through its reference in the International Fire Code. NPGA has three voting seats and three alternates on the 36-person NFPA Technical Committee on LP-Gas. Even with that small percentage, NPGA has an impressive success rate supporting the proposals developed through the work of the TS&S Committee. With the 2020 edition now completed and published, proposals for the 2023 edition are due to be submitted in June 2020.

Work has been completed on NFPA 54/ANSI Z223.1, the National Fuel Gas Code for the 2021 edition and that edition will be available in the Fall of 2020. The International series of codes including the International Fuel Gas Code, Fire Code, and Energy Conservation Codes are also high on NPGA's priority list and proposals for the 2024 edition of the International Fire Code are due in January 2021. Work on the many Z21/83 fuel gas appliance standards is ongoing and NPGA continued to participate in the development of those standards throughout the year.

The TS&S Committee will be working hard to incorporate new provisions into NFPA 58 that will permit the general public to transfer liquid fuel into its vehicles. Accomplishing this will bring NFPA 58 into agreement with the International Fire Code with respect to refueling vehicles, a step considered essential to furthering the objectives of the industry of bringing propane vehicles onto a level playing field with other motor vehicle fuels. Other areas that the TS&S Committee is working on include refining the requirements for food trucks, a relatively new segment of the industry that is fast growing in popularity.

In other codes and standards activities, NPGA continues to advocate for the use of unvented room heaters in high performance "green" buildings. This past year saw NPGA and its coalition partners experience some success as a proposal to introduce onerous sizing criteria for unvented heaters was withdrawn by the ASHRAE Board of Directors from the draft of ASHRAE 62.2, Standard for Indoor Air Quality for Low-Rise Residential Buildings. This action gives the fuel gas industries hope that no further action will be taken until research has been completed to establish scientifically-based emissions data for these products.

Plant Tours

Bringing Congress Home

All politics is local, and the propane industry prides itself in being a local, nonpartisan energy solution in every congressional district in America. To bring this point home, NPGA members hosted 14 members of Congress at their facilities over the course of 2019 (see complete list below), a significant increase from five visits in 2018. These visits expand legislators' knowledge of the industry beyond the grill and educate them on the vital and diverse roles propane plays in providing a reliable, safe, clean, and comfortable way of life for their constituents.

Plant tours have provided clarity and context to complex federal policy issues. As such, these tours serve as a critical grassroots advocacy tool for the association. To date, more than 60 Members of Congress from both sides of the aisle have accepted invitations to tour propane facilities. When Congress has a broad understanding of what the propane industry is about and how it serves local communities, it can encourage and pass sensible public policies.

- March 29, 2019
 Rep. Pete Stauber (MN-08)
 AmeriGas Propane LP; Walker, MN
- April 17, 2019
 Rep. Vicky Hartzler (MO-04)
 AmeriGas Propane LP; Jefferson City, MO
- 3. April 22 25, 2019

 Rep. Jim Hagedorn (MN-01)

 CHS, Inc.; Luverne, MN
- May 31, 2019
 Rep. David Trone (MD-06)
 ThompsonGas, LLC; Frederick, MD
- 5. June 17, 2019

 Rep. Steve Watkins (KS-02)

 Heartland Propane; Girard, KS
- June 30, 2019
 Rep. Dan Newhouse (WA-09)
 AmeriGas Propane LP; Kennewick, WA
- 7. July 9, 2019

 Rep. Grace Napolitano (CA-32)

 Johnson Family Propane; Baldwin Park, CA

- 8. July 29, 2019 **Rep. Kurt Schrader (OR-05)** Blue Star Gas; Salem, OR
- 9. August 15, 2019

 Rep. Larry Bucshon (IN-08)

 Overpeck Gas Compnay; Marshall, IN
- 10. August 19, 2019 **Rep. Rodney Davis (IL-13)** Hicksgas; Urbana, IL
- 11. September 5, 2019

 Rep. Brad Wenstrup (OH-02)

 AmeriGas Propane LP; Mt. Orab, OH
- 12. October 1, 2019

 Rep. Xochitl Torres Small (NM-02)

 AmeriGas Propane LP; Las Cruces, NM
- 13. October 9, 2019

 Rep. Jim Himes (CT-04)

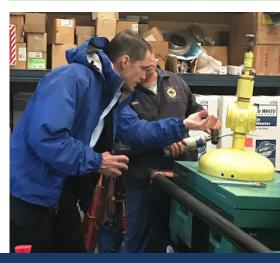
 Rural Fuels; Trumbull, CT
- 14. November 11, 2019

 Rep. Michael Guest (MS-03)

 Lampton-Love Inc; Richland, MS







PropanePAC







NPGA's political action committee, PropanePAC, is one of the association's most valuable advocacy tools. The personal and voluntary contributions it receives mainly through eligible industry employees allow NPGA to support candidates for Congress who support the interests of the propane industry.

PropanePAC provides the only legal way NPGA can directly participate in the political process and help the association mold the type of legislature it gets to work with. In the first year of the 2020 election cycle (calendar year 2019), PropanePAC collected more than \$115,000 in contributions. The PAC also disbursed \$85,500 to a bipartisan collection of Congressional candidate committees and leadership PACs.

A full account of PropanePAC's activities can be found at: www.npga.org/propane-pac.

2020 PAC Admin Fund

Red PACage Sponsors • \$5,000











White PACage Sponsors • \$2,500











Blue PACage Sponsors • \$1,000













About PropanePAC

PropanePAC is the multi-candidate, non-partisan political action committee of NPGA, serving as the political voice of the propane industry. Federal election laws prohibits trade associations from using their general treasury funds to make contributions to federal candidates. Only eligible employees of NPGA's members can empower NPGA to have an active role in the federal election process by contributing their own personal, hard-earned money to PropanePAC.

PropanePAC would like to thank the following major donors for their generosity during the 2019 association year (June 2019 - May 2020):

Individual Donors: Silver Bobtail Club (\$2,500/yr)

Joseph Buschur Shannon McWhorter Jerry Brick Raymond Murray, III

Derek Dalling Andrew Peyton
Gary France D. Frank Platz
Carl Hughes Randy Thompson

Individual Donors: Propane Founders Club (\$1,912/yr)

Cindy Belmont Stephen Kaminski Roger Boehlke Thomas Manson Chris Earhart John O'Neal

Denis Gagne

Individual Donors: 1075 Club (\$1,075/yr)

Tracy Amburgey Andrew Heaney
Doug Auxier Thomas Jaenicke
David Barrett Stephen Kossuth
Malcolm Barrett Chad Kroening
James Bertelsmeyer Andrew Levinson

Eugene Bissell David Lowe John Brooks, III Nash McMahan

Shawn Coady Dominique MonLezun

Amy Dean Todd Pellett
Rob Freeman Roland Penta
Lisa Gerwitz Brian Petrovich
Kim Godlewski Randall Sams

Walton Gresham, III





Workforce Development







NPGA continued to engage in efforts that promote workforce development in 2019 and into 2020 to address the challenges faced by marketers in attracting and retaining qualified employees for the propane industry. Over the past year, working in conjunction with the Propane Education and Research Council (PERC), the most notable designated deliverable completed was the approval of NPGA's application to the Department of Labor (DOL) for designation as a nationally Registered Apprenticeship (RA) program. NPGA will serve as the administrator of the RA program.

The apprenticeship programs approved were for two job classifications, propane service technician and driver. Within the driver classification, there are three different RA programs that will be available, which include 1) bobtail delivery drivers, 2) transport drivers, and 3) utility drivers. These programs can be utilized to bring novice employees into the industry and provide a nationally recognized, structured program that provides the education and skills needed to become an industry professional. The apprenticeship programs can be used by employers internally or can be coupled with secondary educational programs or veterans' programs.

As we move to the implementation phase of the apprenticeship program, NPGA is developing all the requisite materials for compliance with DOL requirements and also to share with the industry to gain a better understanding of the program's requirements and the criteria for participation by employees and employers alike. We continue to work with our industry partners at PERC and the state associations on methods and available funding opportunities for implementation of workforce outreach programs to the industry.





Meetings & Conventions

EXPO 2020

Nashville was the destination for the 2020 NPGA Southeastern Convention & International Propane Expo, at the Music City Center, scheduled for April 6-8. With increasing concerns over public health and safety, NPGA was forced to cancel the trade show and education sessions. Expo was on track to host thousands of attendees, from across the U.S. and around the world, with nearly 250 exhibitors promoting their products and services.

NPGA is grateful to the many people and companies that worked together to plan the 2020 EXPO. A heartfelt thank you to:

Conventions Committee

Exhibitor Advisory Committee

Southeastern Advisory Committee

Exhibitors

Sponsors

Advertisers

Speakers/Presenters

Attendees

We will see you next year in Atlanta, April 10 - 12, 2021!







Propane Days 2019

NPGA began its new annual year in June 2019 in Washington, D.C., with Propane Days, the industry's annual grassroots advocacy fly-in. Industry members were eager to visit their elected officials to discuss extending the alternative fuel tax credits, seek support for the DRIVE-Safe Act, create grant-funding opportunities for propane refueling infrastructure along alternative fuel corridors on interstate highways, require appliance manufacturers to include carbon footprint information on Energy Guide labels, and obtain an exemption from the Jones Act.

More than 200 association members met with their elected officials in Congress. Over the course of two days, attendees promoted the industry's latest policy objectives before dozens of Senators and Representatives, successfully navigating the new Congressional landscape with the Democratic majority in the House of Representatives.

This year's event rolled out a new advocacy strategy, which assigned one or two specific policy issues to each Hill office to increase the effectiveness of the meetings. NPGA also eliminated a keynote speaker from the agenda in order to maximize the amount of time for Propane Days participants to engage members of Congress on the Hill. In addition to creating a more efficient agenda, this change brought the association considerable event cost savings.

Finally, in what has become a Capitol Hill tradition, Propane Days hosted a barbecue reception in the Rayburn House Office Building. Members of Congress and hundreds of Hill staff mingled with the attendees to cap off another successful event. During the reception, Congressman Drew Ferguson (R-GA) received an NPGA Congressional award for his leadership on HR 5988, "Common Sense Certification Reform Act," which addressed the crane rule threat facing the propane gas industry.







CETP Certification

In September 2019, the National Propane Gas Association (NPGA) and the Propane Education & Research Council (PERC) reached an agreement to sell the certification assets of the Certified Employee Training Program (CETP) from NPGA to PERC, effective December 31, 2019. Therefore, on January 1, 2020, PERC assumed full administration of the CETP Certification Program. The sale of the program assets was mutually agreed upon by the officers and leadership of both organizations to advance the safety, training and certification programs in the propane industry by moving all program assets under one roof.

NPGA remains committed to the industry's safety, education and compliance through our continued in-depth engagement with codes and standards development organizations and regulatory agencies. NPGA's involvement with these groups will facilitate a more streamlined process of information sharing with PERC that will enhance the development of new safety and training materials.



Business Councils

Benchmarking

For more than 20 years, NPGA's Benchmarking Council has provided opportunities for propane marketers to search for new ideas by comparing business practices with other marketers who share the same challenges. More than 150 individuals from 125 companies, representing 40 states, meet three times a year and collaborate in a dozen small groups to improve their company's performance. Through the contribution of real-life data analyzed in projects including bobtail operating and delivery analysis, and key performance indicators, members learn how to better operate their businesses. Presentations on specialized topics provide additional learning and networking opportunities. Learn more at www.npga.org/organization/benchmarkingcouncil/.

Cylinder Exchange

The Cylinder Exchange Council operates as an NPGA business council and is comprised of major and independent marketers, as well as suppliers of equipment and service providers, and holds two meetings every year. The purpose of the Cylinder Exchange Council is to provide that segment of the propane industry with the opportunity to review issues and develop projects that are related to the common interests of its members.

During 2019, the Council worked on addressing issues related to the development of the 2020 edition of NFPA 58. Once again, the requirements for fire extinguishers installed at cylinder exchange outlets were modified from the previous edition, but NPGA was successful in clarifying that high flow fire extinguishers were not required. The Council is also monitoring the impact of new inspection requirements for face seals on CGA 791 and CGA 793 cylinder valves. These requirements are part of the 2020 edition of NFPA 58. Members of the Council look forward to continuing involvement in the state and national issues affecting cylinder exchange businesses throughout 2020 and have instituted a new advertising campaign to attract new members into the Council.











Women in Propane

The Women in Propane Council leadership has designed enhanced ways to deliver training, mentoring, and networking to all members of the industry. Workforce development is at the core of the council's mission.

Council members and industry employees have multiple opportunities around the nation and via teleconference to participate in signature programming that has defined a new standard of professional development within the propane industry. The key programs presented by the council in 2019 included:

Leadership Forum at the Expo

• The five-hour intensive DISC training was held at the 2019 Expo.

DiSC on the Road

 The popularity, power, and productivity of the DISC program is available at your place of business, and contracts to engage on-site DISC training experts are affordable and convenient.

• WIP Knowledge Exchange: Mentoring Network

· Volunteer mentors work closely via video conference or phone to guide mentees on their chosen career goals.

Roundtable Session & Networking Reception

 At the Southeast Expo, Women in Propane hosts a leading industry speaker whose topic launches interactive roundtable discussions, followed by an informal reception.

Council business meetings

Council membership currently includes approximately 500 members, both corporate enrollments and individuals. To learn more, visit www.npga.org/wip

30 Under 30



In early 2020, the International Association of Young Gassers announced their flagship program, **30 Under30**, to the propane industry.

Implemented by Young Gassers under the direction of Steph Hennen in conjunction with the National Propane Gas Association and the Canadian Propane Association, the program focuses on recognizing 30 individuals under the age of 30 who have shown great potential within the propane industry. The 30 individuals who were chosen received perks such as free registration to certain industry events, and individual membership to NPGA and Young Gassers for their year in the program.

The **30 Under 30** nominations were reviewed by propane industry veterans who took into consideration the criteria set forth by the program, and the Class of 2020 was announced in late February. They were slated to be recognized at the 2020 Southeastern Convention & International Propane Expo as well as in industry publications. In lieu of their recognition at Expo, NPGA acknowledged each member in several issues of *NPGA Reports* as well as on a dedicated page on the Expo website.

Congratulations to the Class of 2020 30 Under 30 recipients!

Megan Barlow - Evergreen Propane

Trae Boese - Global Gas

Barrett Conway - Cetane Associates

Nathan M. DeBerdine - Dead River Company

Tanner DeWitt - Ed Staub & Sons Petroleum Inc.

Austin Dodge - Woodfin Heating Inc.

Scott Doughtery - Superior Energy Systems

Krista Filious - John Rosbough Trucking

Ashton Fuller - Webster & Garner

Raleigh Garrett - G & S Service, Inc.

Monika Goss - RN Goss Gas Products

Daniel Guglielmo - Paraco Gas Corporation

Travis Hagen - ERAC (Emergency Response Assistance Canada)

James Hajek - Christensen Inc.

Colton Hayes - Westmor Industries

Meranda Hormann - Westmor Industries

Kendall Hostler - Central Valley Ag

Daniel Libralato - Anova

Daniel Montero - Warm Thoughts Communication

Clay Navarette - Tri-Co Propane

Brad Plissey - JaySan Gas Service, Inc

Daniel Quiroga - Metsa Tanks

Cody Reeves - RegO

Dustin Rose - Wendt's Propane and Oil

Elliot Shaffer - Shaffer's Bottled Gas

Matt Silk Jr. - Jennings Oil and Propane

Denver VanderYacht - VanderYacht Propane Inc.

Drake VanderYacht - VanderYacht Propane Inc.

Cooper Wilburn - Propane Resources

Ryan R. Wine - E. P. WINE Inc.

Distinguished Service Award



Daniel N. Myers, The Churchill Centre

Dan Myers was awarded the 2018 NPGA Distinguished Service award on June 3, 2019, the industry's highest honor.

Dan Myers epitomizes the strong, quiet leader who remains mostly behind the scenes, allowing the volunteer leadership to be center stage. As NPGA Executive VP, General Manager and General Counsel from 1976 to 2003, Dan transitioned NPGA to a fully functional accounting system; oversaw a major dues restructuring; created new field staff positions; expanded annual sales of safety, training and marketing publications; coordinated a Congressional lobbying campaign to create PERC; and spearheaded NPGA's move from Chicago to Washington, DC in 2003.

Awards

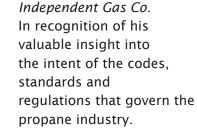
Chair's Citations

Chair Chris Earhart awarded three citations to individuals who have demonstrated extraordinary commitment to the industry.

NPG:



Dan Balmer
Penn Valley Gas Inc.
In recognition of
successfully engaging
Pennsylvania state officials
to work with the PAPGA
in assessing winter
emergencies.



Robert Blackwell.



Bill Young
Superior Energy Systems Ltd.
In recognition of his
many contributions to the
industry over more than five
decades, and participating
in developing safety and
performance standards.

State Director of the Year

Dan Richardson

Conger LP Gas, Inc.

Georgia State Director



Outgoing Chair Chris Earhart receives plaque and gavel.



NPGF Scholarship Program





Established in 1993, the National Propane Gas Foundation (NPGF) Scholarship Fund fosters educational opportunities for the children of National Propane Gas Association (NPGA) member companies by offering scholarships to colleges and vocational/technical/trade schools. The fund provides nonrenewable scholarships in the amounts of \$1,000 and \$2,000.

Scholarships are funded by companies, individuals, and state/regional associations to endow the named scholarships. NPGF's February 2020 Silent Auction netted \$37,000 and money is also raised via the Amazon Smile program, where proceeds from your purchases fund NPGF Scholarships. NPGF also acknowledges its thirty 2019-2020 Corporate Partners who are our industry champions, providing financial support to the Foundation. For a complete list of our nearly 60 Scholarship Donors and Corporate Partners, please visit the scholarship page of NPGA's website.

In August 2019, the NPGA's Executive Committee approved NPGA financing of the Scholarship Foundation's administrative expenses going forward. This has allowed NPGF's fundraising efforts to fully support scholarships, one of the most tangible NPGA member benefits.

NPGF offered scholarships to 95 students totaling \$128,000 in the 2019/2020 year; since its inception, over \$2 million dollars in NPGF scholarships have been awarded.

New scholarships established include:

Benchmarking Council Members #3 Scholarship Jerry and Susan Brick Scholarship (Technical) Illinois Propane Gas Association #3 Scholarship In Memory of Charles Ory Scholarship The Revere Family Scholarship Richard R. Roldan Scholarship

Membership Statistics

NPGA hired consultant Scott Oser & Associates to investigate and evaluate our member recruitment efforts. Their ultimate goal was to identify:

- Target markets most likely to respond to recruitment efforts
- Potential messages that would resonate with identified audiences
- · Marketing tactics to deploy

The final report with results of their survey and analysis was delivered and noted key points, including:

- Staff and personal contact are critical in recruiting and retaining members
- A membership toolkit for use by states should be developed
- Key messaging should stress that NPGA is the voice of the industry

NPGA will use this information while developing its member outreach marketing to new and current members in 2020.

2016 - 2020 Total Members by Category

	2016	2017	2018	2019	2020
Marketers	2410	2348	2331	2259	2153
Manufacturers	143	140	137	138	139
Distributors	42	39	40	37	37
Producers/Wholesalers	21	19	18	15	17
Transporters	9	14	14	14	16
Services	113	117	99	102	109
International	46	43	44	42	42
Individual	9	5	5	6	7
TOTAL MEMBERS	2,793	2,725	2,688	2,587	2,520

2016 - 2020 Marketer Locations

	2016	2017	2018	2019	2020
Bulk Plants	9,965	7,552	7,449	7,662	7,472
Retail Branches	3,615	5,334	5,325	5,409	5,185
Marketer HQ	2,410	2,343	2,266	2,233	2,153





Affinity Programs



NPGA continues to work with its affinity partners to promote their programs and expand their offerings. NPGA values the unflagging support of the state and regional propane associations to promote the programs and increase awareness among members. NPGA continued its revenue sharing program which distributed nearly \$25,000 to the state and regional associations with participating members.





Uniform & facility supplies

Insurance solutions



Tires



Personnel Consultant

Human resources support





Online products & services directory





Compliance system & duty to warn

Office supplies & more



TSYS

Collection services

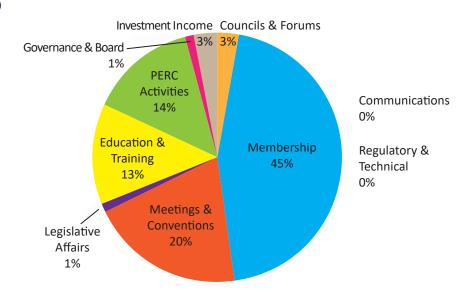
Credit card processing

Financial Statements

Financial Statements At-a-Glance

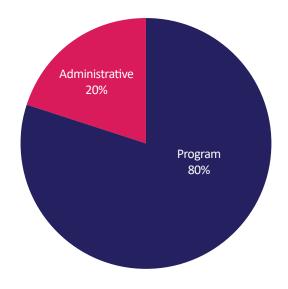
FY 2020 Unrestricted Sources of Revenue (NPGA Only)

Revenue	Amount	Percent
Membership	\$ 3,410,112	45.19%
Meetings and conventions	1,534,330	20.33%
Communications	20,720	0.27%
Regulatory & technical	4,931	0.07%
Legislative affairs	59,169	0.78%
Education and training	948,829	12.57%
PERC activities	1,066,001	14.13%
Governance and board	47,655	0.63%
Investment income	194,836	2.58%
Councils & forums	259,168	3.43%
TOTAL REVENUE	\$ 7,545,751	100.00%



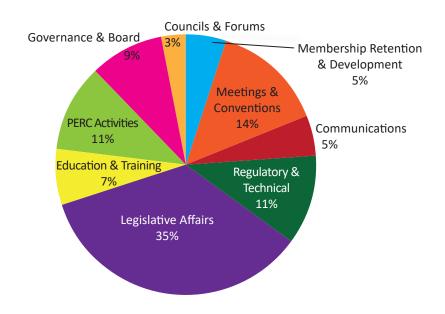
FY 2020 Program & Administrative Expense Chart (NPGA Only)

Expense	Amount	Percent
Program	\$ 6,020,924	79.65%
Administrative	1,538,060	20.35%
TOTAL EXPENSE	\$ 7,558,984	100.00%



FY 2020 Allocation of Expenses (NPGA Only)

Expense	Amount	Percent
Membership retention and development	\$ 408,937	5.41%
Meetings and conventions	1,063,339	14.07%
Communications	384,979	5.09%
Regulatory & technical	805,742	10.66%
Legislative affairs	2,604,297	34.45%
Education and training	509,831	6.74%
PERC activities	845,851	11.19%
Governance and board	676,840	8.95%
Councils & forums	259,168	3.43%
TOTAL EXPENSE	\$ 7,558,984	100.00%





National Propane Gas Association and Affiliate

Consolidated Statement of Financial Position - With Consolidating Information February 29, 2020 (With Comparative Totals for 2019)

		NPGA	NPG	Foundation		Eliminations	Co	nolidated 2020	Conolidated 2	201
ASSETS										
Cash		\$ 436,412	\$	70,053	\$	-	\$	506,465	\$ 168,120	
Investments		8,785,942	3,	317,644		-		12,103,586	10,929,636	
Notes receivable		1,000,000		-		-		1,000,000	-	
Accounts receivable, net		259,994		2,827		(259)		262,562	216,780	
Prepaid expenses and other assets		185,445		-		-		185,445	256,047	
Prepaid convention expenses		245,766		-		-		245,766	195,695	
Investment in deferred compensation plans		446,478		-		-		446,478	417,540	
Inventory		-		-		-		=	12,607	
Property and equipment, net		50,756		-		-		50,756	56,110	
Deposits		25,542		-		-		25,542	20,892	
	Total assets	\$ 11,436,335	\$ 3,	,390,524	\$	(259)	\$	14,826,600	\$ 12,273,427	
LIABILITIES & NET ASSETS		·				<u> </u>				
Liabilities:										
Accounts payable and accrued expenses		\$ 72,417	Ś	759	Ś	(259)	Ś	72,917	\$ 141,512	
Accrued payroll and employee benefits		483,863	*	-	*	-	Ψ	483,863	163.088	
Capital lease liability		17,017		_		_		17,017	891	
Deferred compensation plan obligations		446,478		-		_		446,478	417,540	
Deferred rent		-		-		_		-	37,391	
Deferred rent tenant buildout allowance		-		-		-		-	24,435	
		1,019,775		759		(259)		1,020,275	784,857	
Deferred revenue:						. ,			•	
Dues		1,071,787		2,050		-		1,073,837	923,327	
Conventions		1,299,100		-		-		1,299,100	990,803	
Certified employee training program		176,679		-		-		176,679	129,868	
Business councils and forums		167,882		-		-		167,882	170,829	
Forklift promotion fund		3,573		-		-		3,573	3,573	
Other deferred revenue		17,424		-		-		17,424	16,978	
Total de	ferred revenue	2,736,445		2,050		-		2,738,495	2,235,378	
	Total liabilities	3,756,220		2,809		(259)		3,758,770	3,020,235	
Net assets:										
Without donor restrictions:										
Undesignated		7,206,026		305,023		-		7,511,049	5,897,300	
Board designated		403,667		207,030		<u> </u>		610,697	586,264	
		7,609,693		512,053		-		8,121,746	6,483,564	
With donor restrictions		70,422	2,	875,662		=		2,946,084	2,769,628	
•	Total net assets	7,680,115	3,	387,715		=		11,067,830	9,253,192	
Total liabilities	and net assets	\$ 11,436,335	\$ 3.	,390,524	\$	(259)	Ś	14,826,600	\$ 12,273,427	

Financials are unaudited and do not represent a full financial statemtent presentation. Please refer to the fiscal year 2020 audit report for full disclosure.

National Propane Gas Association and Affiliate, continued

Consolidated Statement of Activities - With Consolidating Information February 29, 2020 (With Comparative Totals for 2019)

	NPGA	NPG	Foundation	Eliminations	Consolidated 2020	Consolidated 20:
JNRESTRICTED REVENUE AND SUPPORT:						
Membership dues and lists	\$ 3,239,022	\$	1,700	\$ -	\$ 3,240,722	\$ 3,242,822
Other membership	171,090		-	-	171,090	167,863
Meetings and conventions	1,534,330		87,373	-	1,621,703	1,653,789
Communications	20,720		-	-	20,720	18,947
Regulatory and technical	4,931		-	-	4,931	5,559
Education and training	948,829		-	(21,458)	927,371	870,113
PERC activities	1,066,001		-	-	1,066,001	912,436
Governance and board	47,655		-	-	47,655	49,643
General and administrative	-		-	-	-	-
Investment income	194,836		-	-	194,836	171,045
Councils and forums	259,168		-	-	259,168	299,867
Contributions	-		11,225	-	11,225	1,201
Net assets transferred from restricted net assets	2,384	1	27,716	-	130,100	21,914
Net assets released from restrictions	56,785		-	-	56,785	43,139
Total net assets without donor restrictions revenue and support	7,545,751	2	28,014	(21,458)	7,752,307	7,458,338
Program services and supporting services:						402.050
Membership retention and development	408,937		-	-	408,937	403,059
Meetings and conventions	1,063,339		-	-	1,063,339	1,049,506
Communications	384,979		-	-	384,979	263,082
Regulatory and technical	805,742		-	-	805,742	923,149
Legislative affairs	2,604,297		-	-	2,604,297	2,095,730
Education and training	509,831		-	-	509,831	613,833
PERC activities	845,851		-	-	845,851	742,576
Governance and board	676,840		-	-	676,840	547,620
Councils and forums	259,168		-	-	259,168	299,867
Management and general	-		37,152	(21,458)	15,694	34,569
Scholarships and award	-		19,805	-	119,805	124,446
Total expenses	7,558,984		56,957	(21,458)	7,694,483	7,097,437
Change in net assets without restrictions before other changes	(13,233)		71,057	-	57,824	360,901

Continued on following page.

National Propane Gas Association and Affiliate, continued

Consolidated Statement of Activities - With Consolidating Information, continued February 29, 2020 (With Comparative Totals for 2019)

	NPGA	NPG Foundation	on Elim	inations	Consolidated 2020	Consolidated 2019
OTHER CHANGES:						
Realized investment earnings gain	\$ -	\$ -	\$	-	\$ -	\$ 94,527
Long-term unrealized investment (loss) gain						
less than designated amount	123,160	-		-	123,160	(206,389)
Pipeline infrastructure defense fund	16,776	-		-	16,776	2,774
Corporate partners program fund	-	7,657		-	7,657	947
State engagement initiative	(104,626)	-		-	(104,626)	(18,235)
State association management settlements	-	-		-	-	6,421
Sale of CETP testing program	1,500,000	-		-	1,500,000	-
Deferred rent adjustment	37,391	-		-	37,391	38,231
	1,572,701	7,657		-	1,580,358	(81,724)
Change in net assets without donor restrictions	1,559,468	78,714		-	1,638,182	279,177
HANGES IN NET ASSETS WITH DONOR RESTRICTIONS:						
CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS: Contributions	56,785	176,456		-	233,241	84,216
CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS: Contributions Endowment investment income	56,785 2,384	176,456 127,716		- -	233,241 130,100	84,216 21,914
Contributions	-	•		-	•	•
Contributions Endowment investment income	-	•		-	•	·
Contributions Endowment investment income Net assets transferred to net assets without donor	2,384	127,716		- - -	130,100	21,914
Contributions Endowment investment income Net assets transferred to net assets without donor restrictions	2,384	127,716			130,100	21,914
Contributions Endowment investment income Net assets transferred to net assets without donor restrictions Net assets released from restrictions	(2,384) (56,785)	127,716 (127,716)		-	130,100 (130,100) (56,785)	21,914 (21,914) (43,139)
Contributions Endowment investment income Net assets transferred to net assets without donor restrictions Net assets released from restrictions Change in net assets with donor restrictions	2,384 (2,384) (56,785)	127,716 (127,716) - 176,456		-	130,100 (130,100) (56,785) 176,456	21,914 (21,914) (43,139) 41,077
Contributions Endowment investment income Net assets transferred to net assets without donor restrictions Net assets released from restrictions Change in net assets with donor restrictions Change in net assets	2,384 (2,384) (56,785)	127,716 (127,716) - 176,456		-	130,100 (130,100) (56,785) 176,456	21,914 (21,914) (43,139) 41,077

Financials are unaudited and do not represent a full financial statemtent presentation. Please refer to the fiscal year 2020 audit report for full disclosure.



National Propane Gas Association Political Action Committee

Statements of Financial Position December 31, 2019 and 2018

	2019	2018
Assets		
Cash	\$ 197,436	\$ 167,625
Accounts receivable	-	190
Total assets	\$ 197,436	\$ 167,815
Net Assets		
Net assets – without donor restrictions	\$ 197,436	\$ 167,815

Statements of Actvities Years ended December 31, 2019 and 2018

	2019	2018
Revenue and support:		
Contributions	\$ 115,121	\$ 118,171
Donated services and support	51,553	79,916
Total revenue and support	166,674	198,087
Expenses:		
Contributions	85,500	104,750
Donated services and supporting services	51,553	79,916
Total expenses	137,053	184,666
Change in net assets	29,621	13,421
Net assets:		
Beginning	167,815	154,394
Ending	\$ 197,436	\$ 167,815

Financials are unaudited and do not represent a full financial statemtent presentation. Please refer to the fiscal year 2020 audit report for full disclosure.

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Schofield. WI

Michael Gorham Northwest Gas Grand Rapids, MN

Carl Hughes Kansas City, MO

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Edinburg, VA

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Prescott, AZ

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France Propane Service Inc.

Schofield, WI

Governmental Affairs

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Maryville, TN

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The Churchill Centre Downers Grove, IL







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