



ANNUAL REPORT

2017-2018

NPGA
NATIONAL PROPANE GAS ASSOCIATION



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Dear NPGA Member:

Over the past year, your national association has developed and embarked upon an aggressive new strategic plan that will bring together the strengths of our industry at both the national and state levels.

This initiative is the result of lengthy, industry-wide consultations focusing on how the industry can most effectively grow in a business and regulatory environment that has changed dramatically in recent years. Input received from our state and regional association affiliates and our national Board of Directors signaled that the industry needed to engage both federal *and* state policymakers in more dynamic, consistent, and comprehensive ways to ensure propane's place at the table.

Our new strategic plan establishes and reinforces four priorities:

- Expanding the industry's advocacy outreach, especially at the state level;
- Pursuing policies which create a favorable business environment;
- Promoting industry cohesion in order to achieve common objectives; and
- Ensuring our communication with both external policymakers and internal industry stakeholders is efficient and effective.

These priorities will fully utilize NPGA's current abilities and require additional resources so that our message is heard loud and clear in each state capital and in Washington, D.C.

A healthy organization is one that reaffirms its mission and the tools it utilizes in fulfilling that mission. Our new strategic plan is NPGA's latest effort to enable our industry to better invest in itself by giving members like you the confidence that the legislative and regulatory challenges you face are being properly addressed. It is a proactive approach which will allow our members to shape their business future rather than react to an uncertain one.

We thank you for your membership in NPGA. Your participation in our association now, more than ever, is a sure sign of your commitment to the industry's bright future.



A handwritten signature in black ink that reads "Jerry Brick".

Jerry Brick
Chairman of the Board
North Star Energy, LLC – Aberdeen, SD



A handwritten signature in black ink that reads "Richard Roldan".

Richard Roldan
President and CEO
National Propane Gas Association



Scholarship

The National Propane Gas Foundation Scholarship Fund was established in 1993 by a committed group wanting to foster educational opportunities for children of NPGA member companies by offering nonrenewable \$1,000 and \$2,000 scholarship awards to attend colleges or vocational/technical schools.

The National Propane Gas Foundation Scholarship Fund (NPGF/SF) anticipates awarding 98 scholarships totaling \$129,000 for the 2018-19 period. Since its commencement, the Fund has awarded almost \$1,790,500 in scholarships to over 1,150 students.

Scholarships are funded from Scholarship Fund endowments, which are managed by the National Propane Gas Foundation. The Fund is designed to preserve and grow the investments in order to maximize the scholarship awards. The Corporate Partners Program invites those in the industry to provide financial support to the Foundation's Scholarship Fund, and in exchange, recognition and promotion is provided at various levels. In 2017, \$46,200 was raised by 34 Corporate Partners to maintain and grow the fund, ensuring the viability of the scholarship program for the future.

The Scholarship Foundation also raises money every year by either holding a silent auction or a golf tournament. The 2018 Silent Auction raised over \$81,000 with more than 100 items donated, our most successful one yet. Randy Thompson and his wife, Jennifer, offered to match the amount donors added to their Silent Auction bids, garnering an additional \$21,000 which will be solely used for additional scholarships in 2018/19 and 2019/20 school years.

The Scholarship Committee is grateful to the many individuals, companies, and state associations who support the Scholarship Fund to invest in the next generation of the propane industry.

New Scholarships

- Raymond B. and Holly S. Murray Scholarship
- Joseph V. Rose Honorary Scholarship

Increased Scholarships

- Gene and Joan Bissell Scholarship
- In memory of Charles and in honor of Sally Gaye Revere Scholarship

2018 CETP Certification

NPGA's CETP Certification Committee continues to work in conjunction with other industry safety groups to ensure the certification program is aligned with the newest safety and training materials and regulatory requirements. An example is the annual comprehensive review the committee does of all CETP certification exams and corresponding skills assessments. This process is designed to address new codes and standards, ensure the effectiveness of the skills assessments, and align the program with the applicable CETP training materials published by PERC.

In June 2017, NPGA launched a new component to the CETP Certification program entitled "Remaining Current." Utilizing the PERC-produced Refresher Training materials for each certification area as the basis, this new program component is designed to keep certification holders current with new safety procedures, technology, equipment, and code changes. Many of the codes and standards referenced in the CETP training courses (NFPA, OSHA & DOT) require recurrent or refresher training, and the *Remaining Current* program element can assist marketers in complying with some of those requirements. Available online or via classroom training, this program is designed to be user friendly and easy to access.

Finally, the CETP Certification Committee completed a rewrite of the CETP Certification policy manual and updated the committee's rules and procedures; both of these projects demonstrate the committee's efforts to modernize and improve the certification program.





Workforce Development

An important initiative woven into NPGA's most recent strategic plan is to engage in efforts that promote workforce development. Through its Workforce Development Task Force (WDTF), NPGA is seeking to address the challenges faced by marketers in attracting and retaining qualified employees for the propane industry.

The mission of the WDTF is to gather information on programs, initiatives, methods, techniques, training programs and partnerships that can be leveraged, developed or utilized to enhance the ability of marketers to attract and retain new employees for all positions within the industry. The task force consists of a mix of propane marketers, state executives and other industry stakeholders, all of whom can provide a broad view of the needs and potential programs that can be leveraged to support the task force's work.

The task force has developed both short-term and long-term deliverables for the industry, which focus on four main areas: 1) Statistical Data, 2) Recruiting, Onboarding and Employment Development, 3) Apprenticeship Programs, and 4) Strategic Partnerships. The WDTF is focusing on specific proposals that consist of the following, which fall into the aforementioned broader categories:

- Develop a Propane Industry Recruitment Marketing Plan.
- Conduct an industry study to gather employment and workforce development statistical information.
- Forge strategic partnerships with military veterans' programs.
- Create strategic partnerships with national and state workforce boards.
- Form approved apprenticeship programs through federal and state department of labor programs.
- Develop partnerships with trade schools, tech schools and community colleges for propane training.

NPGA is currently working with our industry partners, PERC, and affiliated state and regional associations on methods and funding for implementation of the deliverables and programs to the industry.

Codes and Standards

NPGA's Technology, Standards and Safety Committee completed and submitted over 60 proposals to modify NFPA 58 "LP-Gas Code." NPGA representatives on the NFPA Technical Committee on LP-Gas achieved acceptance of almost all of NPGA's proposals during the first round of revisions for what will be the 2020 edition of NFPA 58. They also succeeded in opposing several onerous proposals that were ultimately rejected by the NFPA Technical Committee. The TS&S Committee will continue to provide input during the coming year as part of the second phase of development of the 2020 edition of NFPA 58.

The TS&S Committee is working on several dockets that are intended to support the infrastructure for the growing propane autogas market. In order to achieve true equivalence with traditional motor fuels, the refueling process should be as accessible to the general public as it is for gasoline. To that end, the NPGA has successfully introduced public refueling into the *International Fire Code* and is now working on similar provisions for NFPA 58. In addition, efforts continue to address issues related to the transport and placement of temporary refueling facilities for vehicles in advance of more permanent installations.

NPGA also achieved a noteworthy change to the Underwriters Laboratories (UL) standard 125 (UL 125) on flow control valves. The proposal developed by the TS&S Committee changed UL 125 to allow the use of "latch open" mechanisms on LP-gas dispenser hose end valves used for filling engine fuel containers on vehicles. This is a significant achievement for the propane industry as it strives to attain equivalence in the eyes of the public with gasoline refueling stations.

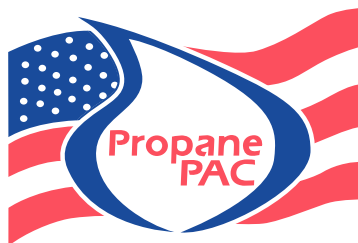
David Kennedy, Director of Autogas Design for Alliance AutoGas/Blossman Services, Inc., noted, *"With this change to UL125, propane Autogas dispenser users will benefit from the same convenience as all other transportation fuels. This change helps eliminate the creative ways drivers would wedge open listed autogas dispensing nozzles (soda bottles were a favorite) and allow for a safer engineered solution from nozzle manufacturers. This is a great accomplishment from NPGA that will greatly benefit autogas marketers and users alike."*

In other codes and standards activities, NPGA continues to advocate for the use of unvented room heaters in high performance "green" buildings. NPGA also remains active in the development of the 2021 International Codes, with the objective of achieving consistency between the requirements of the I-Codes with the NFPA codes and standards.





PropanePAC



PropanePAC Steering Committee chairman David Biggs of the United Propane Autogas Solutions Group in Marshall, MI, has made “engagement” his theme. Through strong peer-to-peer efforts and dynamic programming which bring Washington, D.C. to the membership, he demonstrates how the industry is made stronger and more influential through political action and involvement. In calendar year 2017, PropanePAC raised more than \$110,000. Contributions to the PAC serve as direct, personal commitments to the future of the propane industry.

PropanePAC’s fundraising activities and programs are sponsored by the PropanePAC Administrative Fund. This separate fund receives both corporate and personal contributions from NPGA’s member companies and employees to pay for the expenses of administering and promoting PropanePAC. For FY2018 (March 1, 2017 through February 28, 2018) PropanePAC Administrative Fund sponsorships totaled more than \$44,000.

NPGA greatly appreciates the generosity of all eligible contributors to PropanePAC. Additionally, NPGA is truly grateful to the many companies and affiliated state & regional associations that sponsor the PropanePAC Administrative Fund.

Red PACage Sponsors (\$5,000)



White PACage Sponsors (\$2,500)



Blue PACage Sponsors (\$1,000)



About PropanePAC

PropanePAC is NPGA's multi-candidate, non-partisan political action committee serving as the political voice of the propane industry.

PropanePAC receives voluntary contributions from Individual Members of NPGA and eligible employees of NPGA's member companies. Since federal election laws prohibit trade associations from using their general treasury funds to make contributions to federal candidates, these personal contributions serve as the industry's active voice in supporting candidates for the U.S. House of Representatives and Senate who help advance NPGA's mission.

PropanePAC would like to thank the following individual contributors for their generosity for the 2017 association year (June 2017 through May 2018):

CHSPAC

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

| | | |
|------------------|------------------|---------------------|
| Joseph Armentano | Vincent Osterman | Jerry Sheridan |
| Joseph Buschur | D. Frank Platz | J. Randall Thompson |
| Keith McMahan | William Platz | |
| Gerry Misel | Carlton Revere | |

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

| | | |
|---------------|-------------------|---------------------|
| Roger Boehlke | Michael Hopsicker | Raymond Murray, III |
| Denis Gagne | Thomas Manson | Shannon McWhorter |

1075 Club (\$1,075/yr)

| | | | |
|---------------------|---------------------|-----------------------|-------------------|
| David Barrett | Christopher Earhart | George Koloroutis | Joseph Porco |
| Malcolm Barrett | Gary France | Chad Kroening | James Ressler |
| Robert Barry | Michael Franger | Andrew Levinson | Daniel Richardson |
| David Biggs | Lisa Gerwitz | Boyd McGathey | Charles Robertson |
| Eugene V.N. Bissell | Kim Godlewski | John O'Neal | Anthony Rosback |
| Jerry Brick | Walton Gresham, III | Roland Penta | Randy Sams |
| John Brooks | Jim Ham | Brian Petrovich | Jeffrey Shaffer |
| Shawn Coady | Thomas Jaenicke | Cynthia Platz-Belmont | Stuart Weidie |

For full PAC financial information, please see page 27.





NPGA Business Councils

Benchmarking

For more than 20 years, the Benchmarking Council has worked to advance its members to a higher level of efficiency by focusing on customer service, employee best practices, and improved safety awareness. More than 180 individuals from 135 companies, representing 40 states, meet three times a year and collaborate in small groups to improve their company's performance. Through the contribution of real-life data analyzed in projects including Bobtail Operating and Delivery Analysis, Compensation Analysis, and Key Performance Indicators, members learn how to operate their businesses better. Presentations on specialized topics provide additional learning and networking opportunities. The Council continues to experience rapid growth, with a 13th group being added and more anticipated in the future. Learn more at www.npga.org/benchmarking.

Cylinder Exchange

The Cylinder Exchange Council is comprised of major and independent marketers, equipment suppliers, and service providers. The Council provides this 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 2017 the Council worked on implementing the new requirements in the 2017 edition of NFPA 58 LP-Gas Code that allow for the installation of cylinder exchange cabinets without having to provide additional protection from motor vehicle impact. Representatives of the Council made presentations in Austin, TX before the Texas Railroad Commission and are awaiting a decision by that authority on whether to adopt the new code provisions. The Council has also been working on proposals to NFPA 58 related to the CGA 791 cylinder connection and the need for high flow fire extinguishers at cylinder exchange cabinet installations.

Women in Propane

Women in Propane members have multiple opportunities around the country and via webinar to participate in signature programming that has defined a new standard of professional development within our industry. The Knowledge Exchange: WIP Mentor Network, launched its annual six-month course in April, matching mentees and mentors using customized software. The WIP Leadership Forum was active at the Expo, expanding DiSC training and focusing on management skills. The Council will take DiSC “on the road,” which allows your employees to take advantage of leadership training at your location, on your schedule. WIP hopes to introduce this highly effective tool to more companies and state association audiences.

To maintain high-quality leadership training and serve even more of the next generation’s needs, the council adjusted their membership pricing in 2018. The new dues will more accurately reflect the value members get from the council and will make room for some great new engagement features. Its first dues increase since its inception in 2012, WIP leadership worked diligently to ensure the new structure is favorable and fair to individuals and companies of all sizes.

Council membership includes more than 530 individuals and 26 corporate members. To learn more, visit www.npga.org/wip.





Regulatory

Regulatory Reform Initiatives

As the Trump Administration continued to emphasize regulatory reform, NPGA continued to advocate for the U.S. Department of Transportation (DOT) to prioritize the review and modification of regulations that burden the propane industry. NPGA has used the regulatory reform environment to engage DOT on several policy issues, two of which include expanding the 100 air-mile radius provision of the existing short-haul exemption and seeking changes that would allow the prospective issuance of Hours of Service (HOS) waivers.

Most bobtail deliveries are categorized as short-haul operations, but bobtails can travel greater distances to serve customers, particularly in the western U.S. in states with much larger land masses. An expansion of the air-mile radius would not only increase the number of customers, but it would also increase the number of commercial motor vehicles that would be exempt from the electronic logging device (ELD) requirements since ELDs are not required for installation for short-haul delivery vehicles.

NPGA also discussed with DOT the value of the agency allowing for the prospective publication of HOS waivers when certain conditions are met, i.e. issuing waivers prior to an emergency rather than during an emergency. In doing so, it would allow the industry to secure the requisite supply of propane to more effectively and efficiently serve their customers.

The fruits of this discussion with DOT, which occurred in the late summer of 2017, became apparent when the industry was faced with a prolonged stretch of record cold weather in the 2017-2018 winter. Having previously laid the groundwork on this subject with DOT, and recognizing the impact of nearly unprecedented consumer demand, DOT issued a series of regional Hours of Service waivers that encompassed 38 states and provided valuable relief to the industry to secure needed propane supply.

Other regulatory reform initiatives NPGA has brought to the attention of DOT include the final publication of the agency's action to return the initial requalification period to 12 years for DOT-specification cylinders that have been hydrostatically tested, highlighting the burdens of the agency's entry-level driver training requirements (scheduled to become effective in 2020) and the need to modify the current DOT regulations pertaining to jurisdictional propane pipeline systems.

Exemption from OSHA's Crane Rule

NPGA has long-held objections to the applicability of the Occupational Safety and Health Administration's (OSHA) Crane Rule to the propane industry. From its onset, NPGA challenged its relevance to propane tank delivery and persisted in our arguments for exclusion from the regulation.

The current compliance deadline of November 10, 2018, for 3rd party certification of crane operators represents another extension of the initial deadline. OSHA intends to propose modifications to the crane operator certification requirement of the regulation during this period to address a myriad of broad industry concerns.

Nevertheless, NPGA is advocating for a full exemption from the Crane Rule of propane tank deliveries and retrievals. We remain engaged on a number of fronts to energize Congress and raise the red flag to the presidential administration about the astronomical costs of imposing the Crane Rule on the propane industry.

Congressional outreach, persistent dialogue with the agency, and detailed descriptions of regulatory impact analyses with the administration highlight the efforts undertaken by NPGA to obtain relief from the Crane Rule. This initiative will also be a focal point of NPGA's 2018 Propane Days lobbying event to be held in June.





Meetings and Conventions

Discover the Energy! Connect. Learn. Enjoy.

The NPGA Southeastern Convention & International Propane Expo returned to Atlanta, Georgia taking place April 6 – 8, 2018. Nearly 3,300 individuals participated, marking a six percent increase in attendance over the last time it was located in Atlanta in 2015. The three-day event attracted participants from 48 U.S. states, the District of Columbia, Guam, Puerto Rico, and 31 foreign countries and territories. In addition, the nearly sold-out 180,000 sq. ft. exhibition hall included more than 240 exhibiting organizations.

Propane Education & Research Council President & CEO Tucker Perkins presented *PERC Update Live*, covering the propane industry's embrace of marketing communications, its ongoing commitment to safety and training, and its preparation for peak winter demand season. He invited attendees to join him and his PERC colleagues in the exhibit hall and educational sessions to learn about tools propane retailers can use to grow gallons, train the workforce, and keep customers safe.

Following the *PERC Update Live*, CBS Sports Broadcaster Greg Gumbel entertained the audience with humorous stories from his over 40 years of working in the broadcasting industry. The educational components of the Expo included 28 breakout sessions, seven Fast Track Sessions, several Propane Technical Workshops, and the Women in Propane hosted the WIP Leadership Forum @ the Expo. In addition, NPGA added a preconference "Propane Cargo-Tank Test & Inspection Workshop" to this year's agenda.

Other program highlights included a three-hour Welcome Reception on the exhibit hall floor, Women in Propane Reception, Young Gassers' Reception at the Mercedes Benz Stadium, and Prayer Breakfast featuring Rev. Dr. William Fullilove.

In 2019, Expo will return to the Georgia World Congress Center, April 13-15. Visit the official website at www.NPGAexpo.com for additional information on exhibiting or attending.

2017 Propane Days

NPGA's annual fly-in, Propane Days, took place in June 2017. Industry members were eager to visit their elected officials to discuss tax reform, improving the propane delivery infrastructure, opposition to the Crane Rule, and preserving funding for Clean Cities and LIHEAP.

NPGA began its new association year with *Propane Days*, the industry's annual grassroots advocacy fly-in in Washington, D.C. More than 225 members from across the country came to the nation's capital to meet 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, looking to take advantage of legislative opportunities with a new pro-business Congress and administration.

For 13 years, the industry has used *Propane Days* as an opportunity to educate legislators on the many social and environmental benefits of propane, as well as to enlighten them on its broad scope of uses beyond traditional applications like home heating and cooking. One elected official who knows well of the industry's diversity is Senator Mike Rounds (SD), who addressed attendees the first day. Hailing from a vastly rural state whose citizens rely heavily on propane, Senator Rounds encouraged attendees to continue advocating for policies which would grow domestic propane markets and help ensure a reliable supply for all Americans.

As Senator Rounds noted the importance of market diversity as a key component to energy security, attendees then heard from Admiral Eric Olson (ret.) on the ever-changing threats and challenges to American physical security by international bad-actors. As the first Navy Seal ever to be appointed a four-star general, Admiral Olson shared stories from his rich career as a military officer and emphasized the importance of strong, steadfast leadership in trying times.

In what has become a Capitol Hill tradition, *Propane Days* ended its first full day of meetings with a barbeque 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.





Plant Tours

Plant Tours: Bringing Congress Home

All politics is local, and the propane industry prides itself in being a local, bi-partisan energy solution for every congressional district in America. To bring this point home, NPGA members hosted dozens of representatives and senators at their facilities over the course of the year. Such visits added to a growing trend to expand legislators' knowledge of the industry beyond the grill; to 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 40 Members of Congress from both sides of the aisle have accepted invitations to tour propane facilities. When Congress has a broad and bi-partisan understanding of what the propane industry is about and how it serves local communities, it can encourage and pass sensible public policies.

Governmental Affairs

Tax Reform Enacted by Congress

After years of effort, a new tax reform law was signed into law on December 22, 2017. NPGA was an active participant in the debates over the years and many favorable provisions beneficial to the propane industry are now in place. Items of particular interest include:

- Corporate tax rate permanently reduced to 21%, effective 2018.
- Repeals the corporate alternative minimum tax.
- Across-the-board cuts in individual tax rates, with a top marginal rate of 37% for taxable incomes over \$600,000 (married) and \$500,000 (single). Effective 2018 through 2025.
- Provides a 20% deduction for qualified business income of pass-through entities (i.e., sole proprietorships, partnerships, C corporations, trust and estates), although some limitations apply.
- Increases the current-law small business expensing limitation under section 179 from \$500,000 to \$1 million and the phase out range from \$2 million to \$2.5 million for taxable years 2018 and beyond. The \$1 million and \$2.5 million amounts are indexed for inflation.
- Temporarily increases the bonus depreciation percentage to 100 percent for property placed in service after September 27, 2017, and before January 1, 2023 (2024 for certain longer production period property and aircraft). The expensing percentage phases down to 80% for 2023, 60% for 2024, 40% for 2025, and 20% for 2026.
- Limits the deductibility of business interest expense, but exempts businesses with average gross receipts of \$25 million or less.
- Doubles the exemption amount of \$5 million to \$10 million (indexed for inflation) for estate and gift taxes for decedents dying after 2017 and before 2026.





Autogas Tax Credits Extended for 2017

As part of a short-term spending measure, President Trump signed into law on February 9, 2018 the retroactive extension of the alternative fuel tax credit and the alternative fuel infrastructure credit, but only for 2017 transactions. This capped off two months of intensive lobbying by NPGA and others to achieve this objective. NPGA continues to work to convince Congress to extend these credits prospectively. One important step forward was securing a seat at the witness table for Past NPGA Chairman Stuart Weidie to testify before the House Ways and Means Tax Policy Subcommittee on March 14, 2018 in support of future extensions of these important tax credits.

Exempting Propane Tanks from the OSHA Crane Rule

NPGA helped convince OSHA to issue a one-year delay of the compliance date for the crane rule to November 10, 2018. This reprieve allowed NPGA to accelerate its advocacy to rid the industry once and for all of this burdensome rule. Since that time, NPGA has met with the White House's Office of Information and Regulatory Affairs; the Labor Department's Private Sector Liaison Officer; the Small Business Administration; and multiple congressional offices to obtain relief from the rule. Six members of Congress wrote a letter on March 13, 2018 urging language be included in the Labor-HHS appropriations bill prohibiting OSHA from enforcing the third-party certification requirement. NPGA will continue to press for relief until our objective is reached.

State Affairs

State Engagement Initiative

The state affairs program coordinates with state associations and industry leaders to defend against harmful legislative or regulatory proposals that could have a domino effect across the country.

To complement this effort, NPGA's Executive Committee has committed up to \$500,000 for the State Engagement Initiative to provide necessary resources to protect the industry. After significant victories in 2016 over subsidized natural gas proposals in both the legislative and regulatory arenas, NPGA and the state associations continued the fight in 2017.

The State Engagement Initiative assisted the Illinois Propane Gas Association's legislative and regulatory challenges against powerful natural gas utilities, while it also helped the Mid-Atlantic Propane Gas Association score a win over Washington Gas in Maryland.

In addition to fighting against natural gas expansion, NPGA continues its efforts to ensure propane receives parity with other alternative fuels as well as fighting carbon tax and cap and trade proposals.



Awards

Chairman's Citations

Chairman Stuart Weidie awarded Chairman's Citations to individuals who have demonstrated extraordinary commitment to the industry:

David Auxier

Bulk Truck &
Transport Service

Bob Nicholson

Eastern Propane

Roland Penta

Phelps Sungas Inc.

Jim Renaldo

Renaldo Sales &
Service, Inc.

Rosie Buschur

Teri Ory

Joe Rose

Former president of the Propane
Gas Association of New England



**Roland Penta and
Jim Renaldo**



Joe Rose



Rosie Buschur



Safety Award
Randy Warner
Ferrellgas



**NPGF Outstanding
Service Award**
Naomi Cordill
(first recipient)



State Director of the Year
Joseph Buschur



Distinguished Service Award

David L. Lugar posthumously received the Distinguished Service Award, NPGA's highest honor, at the NPGA Board of Directors meeting on June 19, 2017. Mr. Lugar was a dedicated servant to the propane industry, serving at the highest level in numerous roles at NPGA and PERC while managing a demanding professional career. Lugar's wife, Lajan, and son, Kole, accepted the award on his behalf.

Membership

Membership Analysis

While acquisitions and industry consolidation were robust in 2017, their effect on marketer membership was not significant. The Services Section saw the greatest decline in members after a strong uptick in 2016 and 2017. A recruitment and retention plan was launched in May 2018 to reach new and former members, and remind new and current members about available programs and benefits. The plan uses traditional and digital media to convey the messages, including print ads and direct mail.

2014 – 2018 Total Members by Category

| | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|--------------|--------------|--------------|--------------|--------------|
| Marketers | 2,465 | 2,466 | 2,410 | 2,348 | 2,331 |
| Manufacturers | 132 | 127 | 143 | 140 | 137 |
| Distributors | 39 | 39 | 42 | 39 | 40 |
| Producers | 18 | 16 | 21 | 19 | 18 |
| Transporters | 6 | 7 | 9 | 14 | 14 |
| Services | 94 | 93 | 113 | 117 | 99 |
| International | 45 | 41 | 46 | 43 | 44 |
| Individual | 12 | 11 | 9 | 5 | 5 |
| TOTAL MEMBERS | 2,811 | 2,800 | 2,793 | 2,725 | 2,688 |

2014 – 2018 Marketer Locations

| | 2014 | 2015 | 2016 | 2017 | 2018 |
|-----------------|-------|-------|-------|-------|-------|
| Bulk Plants | 9,448 | 9,968 | 9,965 | 7,552 | 7,341 |
| Retail Branches | 3,475 | 3,651 | 3,615 | 5,334 | 5,265 |
| Marketer HQ | 2,465 | 2,466 | 2,410 | 2,348 | 2,331 |





Affinity Programs

The Affinity Program Task Force studied proposals from a variety of vendors in 2017, ultimately recommending three to the Member Services Committees for its consideration. In January 2018 the Executive Committee voted to approve two new partners, AVATAS Payment Solutions and P3 Propane Safety, and renewed the contract with TekCollect. The new and existing affinity partners offer an assortment of business services designed to save NPGA members time and money. NPGA works with the state and regional associations to increase awareness and use of the affinity programs.

Affinity Partners



Credit card processing



Uniforms & facility supplies



Insurance solutions



Tires



Human resources support



Background checks



Compliance system & duty to warn



Online products & services directory



Office supplies & more



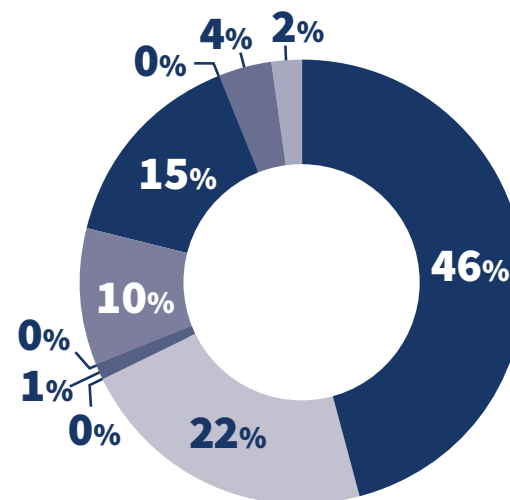
Collection services

At-a-Glance

FY 2018 Sources of Revenue (NPGA Only)

| | | |
|-------------------------------|-----------|-----|
| Membership | 3,498,817 | 46% |
| Meetings and conventions | 1,668,293 | 22% |
| Communications | 21,042 | 0% |
| Regulatory and technical | 4,703 | 0% |
| Legislative affairs | 44,757 | 1% |
| Education and training | 735,456 | 10% |
| PERC activities | 1,094,179 | 15% |
| Governance and board | 34,662 | 0% |
| Councils and forums | 303,099 | 4% |
| Investment income – operating | 149,329 | 2% |

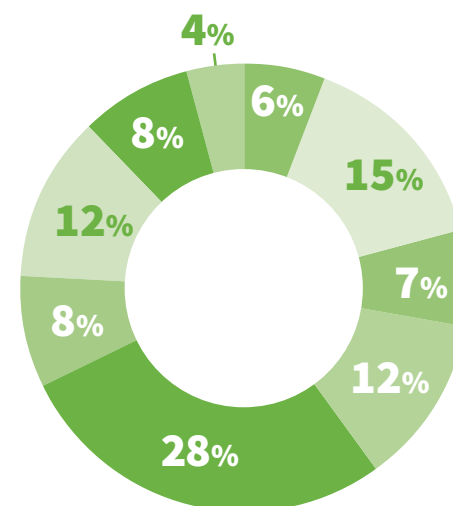
Total **\$7,554,337** **100%**



FY 2018 Allocation Of Program Expenses (NPGA Only)

| | | |
|--------------------------|-----------|-----|
| Membership | 425,955 | 6% |
| Meetings and conventions | 1,134,872 | 15% |
| Communications | 547,486 | 7% |
| Regulatory and technical | 870,324 | 12% |
| Legislative affairs | 2,092,774 | 28% |
| Education and training | 582,131 | 8% |
| PERC activities | 911,095 | 12% |
| Governance and board | 559,721 | 8% |
| Councils and forums | 303,099 | 4% |

Total **\$7,427,457** **100%**



National Propane Gas Association and Affiliate

Consolidated Statement of Financial Position – With Consolidating Information

February 28, 2018 (With Comparative Totals for 2017)

| | 2018 (Consolidating Information) | | | | |
|---|----------------------------------|--------------------|----------------|---------------------|---------------------|
| | NPGA | NPG Foundation | Eliminations | Consolidated 2018 | Consolidated 2017 |
| ASSETS | | | | | |
| Cash | \$1,227,805 | \$92,570 | \$— | \$1,320,375 | \$242,557 |
| Investments | 7,112,616 | 3,049,819 | — | 10,162,435 | 9,854,124 |
| Accounts receivable, net | 184,413 | 14,049 | 4,231 | 202,693 | 363,221 |
| Prepaid expenses and other assets | 231,305 | 946 | — | 232,251 | 264,765 |
| Prepaid convention expenses | 169,158 | — | — | 169,158 | 230,894 |
| Investment in deferred compensation plans | 413,107 | — | — | 413,107 | 348,533 |
| Inventory | 10,073 | — | — | 10,073 | 16,311 |
| Property and equipment, net | 82,700 | — | — | 82,700 | 138,354 |
| Deposits | 31,360 | — | — | 31,360 | 38,505 |
| Total assets | \$9,462,537 | \$3,157,384 | \$4,231 | \$12,624,152 | \$11,497,264 |
| LIABILITIES AND NET ASSETS | | | | | |
| Liabilities: | | | | | |
| Accounts payable and accrued expenses | \$303,674 | \$4,731 | \$4,231 | \$312,636 | \$186,019 |
| Accrued payroll and employee benefits | 104,537 | — | — | 104,537 | 103,188 |
| Capital lease liability | 6,098 | — | — | 6,098 | 11,070 |
| Deferred compensation plan obligations | 413,107 | — | — | 413,107 | 348,533 |
| Deferred rent expense | 75,621 | — | — | 75,621 | 106,507 |
| Deferred rent tenant buildout allowance | 53,757 | — | — | 53,757 | 83,079 |
| Total assets | 956,794 | 4,731 | 4,231 | 965,756 | 838,396 |

| | 2018 (Consolidating Information) | | | | |
|---|----------------------------------|--------------------|----------------|---------------------|---------------------|
| | NPGA | NPG Foundation | Eliminations | Consolidated 2018 | Consolidated 2017 |
| Deferred revenue: | | | | | |
| Dues | 1,302,220 | 1,850 | — | 1,304,070 | 980,596 |
| Conventions | 1,072,132 | — | — | 1,072,132 | 1,099,000 |
| Certified employee training program | 127,369 | — | — | 127,369 | 108,699 |
| Business councils and forums | 205,564 | — | — | 205,564 | 261,655 |
| Forklift promotion fund | 3,573 | — | — | 3,573 | 3,573 |
| Other deferred revenue | 12,750 | — | — | 12,750 | 12,083 |
| Total deferred revenue | 2,723,608 | 1,850 | — | 2,725,458 | 2,465,606 |
| Total liabilities | 3,680,402 | 6,581 | 4,231 | 3,691,214 | 3,304,002 |
| Net assets: | | | | | |
| Unrestricted: | | | | | |
| Undesignated | 5,327,596 | 294,248 | — | 5,621,844 | 5,060,729 |
| Board designated | 384,117 | 198,426 | — | 582,543 | 496,361 |
| Permanently restricted | 70,422 | 2,658,129 | — | 2,728,551 | 2,636,172 |
| Total net assets | 5,782,135 | 3,150,803 | — | 8,932,938 | 8,193,262 |
| Total liabilities and net assets | \$9,462,537 | \$3,157,384 | \$4,231 | \$12,624,152 | \$11,497,264 |

Financials do not represent a full financial statement presentation.
Please refer to the fiscal year 2018 audit report for full disclosure.

National Propane Gas Association and Affiliate, continued

Consolidated Statement of Financial Position – With Consolidating Information

February 28, 2018 (With Comparative Totals for 2017)

| | 2018 (Consolidating Information) | | | | |
|---|----------------------------------|----------------|-----------------|-------------------|-------------------|
| | NPGA | NPG Foundation | Eliminations | Consolidated 2018 | Consolidated 2017 |
| UNRESTRICTED REVENUE AND SUPPORT: | | | | | |
| Membership dues and lists | \$3,345,764 | \$2,350 | \$— | \$3,348,114 | \$3,710,849 |
| Other membership | 153,053 | — | — | 153,053 | 213,203 |
| Meetings and conventions | 1,668,293 | 101,886 | — | 1,770,179 | 1,727,599 |
| Communications | 21,042 | — | — | 21,042 | 15,000 |
| Regulatory and technical | 4,703 | — | — | 4,703 | 9,089 |
| Education and training | 735,456 | — | (31,000) | 704,456 | 671,010 |
| PERC activities | 1,094,179 | — | — | 1,094,179 | 950,799 |
| Governance and board | 34,662 | — | — | 34,662 | 44,217 |
| General and administrative | 460 | — | — | 460 | 233 |
| Investment income | 148,869 | — | — | 148,869 | 138,442 |
| Councils and forums | 303,099 | — | — | 303,099 | 323,891 |
| Contributions | — | 8,830 | — | 8,830 | 4,446 |
| Net assets transferred from (to) temporarily restricted | 532 | 255,412 | — | 255,944 | 286,523 |
| Net assets released from restrictions | 44,225 | — | — | 44,225 | 43,845 |
| Total unrestricted revenue and support | 7,554,337 | 368,478 | (31,000) | 7,891,815 | 8,139,146 |

| | 2018 (Consolidating Information) | | | Consolidated 2018 | Consolidated 2017 |
|--|----------------------------------|-------------------|--------------|----------------------|----------------------|
| | NPGA | NPG Foundation | Eliminations | | |
| EXPENSES: | | | | | |
| Program services and support: | | | | | |
| Membership | 425,955 | — | — | 425,955 | 757,009 |
| Meetings and conventions | 1,134,872 | — | — | 1,134,872 | 1,149,061 |
| Communications | 547,486 | — | — | 547,486 | 413,091 |
| Regulatory and technical | 870,324 | — | — | 870,324 | 1,022,885 |
| Legislative affairs | 2,092,774 | — | — | 2,092,774 | 2,059,899 |
| Education and training | 582,131 | — | — | 582,131 | 670,742 |
| PERC activities | 911,095 | — | — | 911,095 | 751,650 |
| Governance and board | 559,721 | — | — | 559,721 | 553,024 |
| Councils and forums | 303,099 | — | — | 303,099 | 323,891 |
| Management and general | — | 66,424 | (31,000) | 35,424 | 42,254 |
| Scholarships and award | — | 127,470 | — | 127,470 | 122,000 |
| Total expenses | 7,427,457 | 193,894 | (31,000) | 7,590,351 | 7,865,506 |
| Change in unrestricted net assets before other changes | 126,880 | 174,584 | — | 301,464 | 273,640 |

(Continued)

National Propane Gas Association and Affiliate, continued

Consolidated Statement of Financial Position – With Consolidating Information

February 28, 2018 (With Comparative Totals for 2017)

| | 2018 (Consolidating Information) | | | Consolidated 2018 | Consolidated 2017 |
|---|----------------------------------|-------------------|--------------|----------------------|----------------------|
| | NPGA | NPG Foundation | Eliminations | | |
| OTHER CHANGES: | | | | | |
| Realized investment earnings gain | \$10,843 | \$— | \$— | \$10,843 | \$2,672 |
| Long-term unrealized investment gain (loss) less than designated amount | 488,262 | — | — | 488,262 | 551,981 |
| Pipeline infrastructure defense fund | 39,579 | — | — | 39,579 | 46,695 |
| Corporate partners program fund | — | 48,915 | — | 48,915 | 46,642 |
| State engagement initiative | (53,120) | — | — | (53,120) | (92,731) |
| State association management settlements | 12,853 | — | — | 12,853 | (42,792) |
| State association prior years dues reconciliations | — | — | — | — | (128,451) |
| Membership dues contribution to state associations | (232,385) | — | — | (232,385) | — |
| Deferred rent adjustment | 30,886 | — | — | 30,886 | 23,705 |
| | 296,918 | 48,915 | — | 345,833 | 407,721 |
| Change in unrestricted net assets | 423,798 | 223,499 | — | 647,297 | 681,361 |

| | 2018 (Consolidating Information) | | | | |
|--|----------------------------------|----------------|--------------|-------------------|-------------------|
| | NPGA | NPG Foundation | Eliminations | Consolidated 2018 | Consolidated 2017 |
| CHANGES IN TEMPORARILY RESTRICTED NET ASSETS: | | | | | |
| Contributions | 44,225 | — | — | 44,225 | 43,845 |
| Endowment investment income (loss) | 532 | 255,412 | — | 255,944 | 286,523 |
| Net assets transferred (to) from unrestricted | (532) | (255,412) | — | (255,944) | (286,523) |
| Net assets released from restrictions | (44,225) | — | — | (44,225) | (43,845) |
| | — | — | — | — | — |
| CHANGES IN PERMANENTLY RESTRICTED NET ASSETS: | | | | | |
| Contributions | — | 92,379 | — | 92,379 | 101,116 |
| | — | 92,379 | — | 92,379 | 101,116 |
| Change in net assets | 423,798 | 315,878 | — | 739,676 | 782,477 |
| Net assets: | | | | | |
| Beginning | 5,358,337 | 2,834,925 | — | 8,193,262 | 7,410,785 |
| Ending | \$5,782,135 | \$3,150,803 | \$— | \$8,932,938 | \$8,193,262 |

Financials do not represent a full financial statement presentation.
Please refer to the fiscal year 2018 audit report for full disclosure.

National Propane Gas Association Political Action Committee

Statements of Financial Position

December 31, 2017 and 2016



| | 2017 | 2016 |
|---------------------------|------------------|------------------|
| Assets | | |
| Cash | \$154,294 | \$141,428 |
| Accounts receivable | 100 | — |
| Total assets | \$154,394 | \$141,428 |
| Net Assets | | |
| Net assets — unrestricted | \$154,394 | \$141,428 |

Statement of Activities

Years Ended December 31, 2017 and 2016

| | | |
|----------------------------------|----------------|----------------|
| Revenue and support: | | |
| Contributions | \$107,966 | \$119,475 |
| Donated services and support | 89,698 | 91,639 |
| Other revenue | | 1,800 |
| Total revenue and support | 197,664 | 212,914 |
| Expenses: | | |
| Contributions and grants | 95,000 | 119,400 |
| Donated services and support | 89,698 | 91,639 |
| Total expenses | 184,698 | 211,039 |
| Change in net assets | 12,966 | 1,875 |
| Net assets: | | |
| Beginning | 141,428 | 139,553 |
| Ending | \$154,394 | \$141,428 |

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