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From the President

hile the past year has been one none of us will ever forget, I want to express my amazement at the spirit, grit, and nimbleness of our industry. Despite Covid's effects on our workforce, February's recordbreaking arctic blast, and relentless attacks on any fuel that has a carbon atom, propane is continuing to thrive. As demonstrated by the latest data, the number of households using propane as their primary space heating fuel increased by more than 240,000 – up 4.2%. And despite ever-better-efficiency of propane-powered residential applications, in the past year American retail gallons sold cracked 10 billion – a number not seen in well over a decade.

And yet, the barrage of anti-clean fossil fuel policies continues to mount. Aggressive municipal action to enact stricter building and air quality codes than the state, and regulatory proposals favoring electrification are widespread. Flat-out banning gas in new construction and remodeling, and state energy code overhauls are rearing their ugly heads all over the map. On the federal side, we are working with a Democratic-controlled White House, both chambers of Congress, and top regulatory agency appointees, as well as codes and standards bodies all often favoring electrification. Since Inauguration Day we have seen federal proposals to allocate billions of dollars to electrifying everything from buildings to appliances to school buses.

NPGA's team is strong and we are very active – both on the offensive and defensive fronts – with coalition partners, state and regional propane gas association colleagues, and our colleagues at PERC. The threats to our industry, while misguided and under-informed, are real. Below is a letter I penned in response to *The New York Times*, summarizing the battle we face, not only with policymakers but with consumers, thought leaders, and the media.

Cancel Culture's Latest Victim: Energy Choice

I'm not one to scream "cancel culture." Companies have been making decisions for decades about what best serves their customers, shareholders, and values. And they should have that right. But I implore them to review the facts objectively before making decisions based on perceived values shouted by the loudest voices.

Last week my organization, which represents the United States propane industry, tried to place a spot in The New York Times (digital version) directing readers to our website to highlight ways that propane is accelerating decarbonization. It was rebuffed as "an advertisement for a fossil fuel." Refusing our spend is tantamount to canceling propane as an acceptable choice of energy. It's particularly troubling when the goal was to educate around how propane is helping solve the climate crisis, how it helps lower-income citizens pay their bills, and how it helps during emergencies like when the grid went dark in Texas in February.

Science matters. We hear it time and again and rightfully so. But science seems to be ignored when it doesn't fit the narrative of the high-decibel parishioners of the Church of the Moral Compass who see electrification as their one-and-only climate savior. A few pesky scientific facts... In 41 of 50 states, propane has a lower carbon intensity than the electric grid (U.S. Energy Information Administration and California Air Resources Board data). In 33 states, propane's carbon output is more than 50% lower than electric, and in 19 states, more than 100% lower. And the electric grid is only 37% efficient – as per the Federal Energy Star program it takes 2.80 units of electricity to produce and deliver one unit of energy to a home, compared to only 1.01 for propane.

It's not just CO₂ where propane soundly beats electricity on emissions. Propane has lower NOx and SOx emissions than



electric across home applications like furnaces, water heaters, and cooktops, and industrial applications like forklifts and agricultural equipment. So right now, using propane instead of electricity is bettering the air we breathe. Perhaps that's why India, Brazil, Indonesia, and countries across Latin America have deemed propane their primary means of meeting climate goals.

I hear the chorus's counter — "That's all fine, but wait until solar and wind are ubiquitous. Then the grid will be much cleaner." I agree and can't wait! Propane complements solar and wind in numerous applications already. For example: a 12,000-square-foot facility in North Carolina uses a 40% solar / 60% propane system to power its operations, achieving a 68% emissions reduction compared to the electric grid. I simply ask that all energy sources be given the same lead time. Currently, seven facilities produce renewable propane and another seven are expected by 2024.

Not only does science matter, but so does economic justice. Access to clean, affordable energy like propane ensures equity on the path to zero. As reported by the U.S. Department of Energy, the price of propane was 53% less expensive than electricity in 2020. And as recognized by the California Public Utilities Commission in February 2021, forced electrification "means that for low-income households, increases in utility bills will crowd out other purchases." To wit, forced residential electrification would increase the average household's energy costs by \$750-\$910 per year. Heat or Eat is real for millions of Americans.

Finally, our country needs to have a serious conversation around energy resiliency. Propane is repeatedly called on to rescue the electric grid during emergencies because propane can be trucked anywhere at any time. Examples in just the past year include use during the worst hurricane season on record, the blackouts across the South, heating Covid testing tents last spring, and let's not forget allowing restaurants to heat outdoor seating throughout the pandemic.

Access to clean, affordable energy like propane ensures equity on the path to zero.

Some of propane's proudest moments come when people need it most. During the grid failure in Texas, propane saved a batch of 7,000 Covid vaccine doses that needed refrigeration, backed up the railroad system, powered pop-up mobile kitchens, and fueled generators to keep tens of thousands of Americans warm. And in case you texted to make sure a loved one was safe, propane generators back up cell phone towers, too.

To The New York Times digital ad decisionmakers, legislators and regulators, and anyone who believes electrification is a silver bullet: Don't cancel a fuel that accelerates decarbonization today and will tomorrow, that allows lower-income families affordable heat, and that comes to the rescue time and again when the electric grid fails.

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From the Chair



Denis Gagne *Chair of the NPGA Board*

A Year of Transition and Accomplishments

Our Association has transitioned to meet the advocacy challenges and relevant needs pertaining to our industry and its members in conducting business in today's society and current energy environment. Solutions to these challenges have been facilitated through an NPGA Team, led by Steve Kaminski, with governance and input from industry volunteers mostly comprised of the Board of Directors, Executive Committee, and Officers.

There are a number of initiatives and undertakings over the past few years that have made NPGA and the propane industry stronger today and positioned to meet the challenges of tomorrow. Some examples include:

- A reorganized NPGA Team.
- Timely and relevant communication with rapid response when necessary.
- A new website which gives members greater access to information.
- The redesigned weekly newsletter to keep you up to date.
- NPGA and PERC will share office space starting in 2022.
- New Partnership agreement with PERC for 2021.
- Formation of an NPGA and PERC combined environmental task force.
- Continued collaboration with the industry's three pillars The States, PERC, and NPGA.

These are just a few examples that are over and above what NPGA does day-to-day in the areas of legislative and regulatory affairs, meeting management, on-going guidance and resources available to members, and more. We have so much to be thankful for in what we have and what we have accomplished thus far as we move forward in a low carbon environment and the challenges that brings.

Most importantly we have – the right team, a strong vision, and a well thought out plan to promote the propane industry as a clean, affordable, and renewable energy source that will help accelerate decarbonization in our country.

In closing, I wish to thank all of you for the trust and support you have given me as well as the other Officers over the past few years. With utmost sincerity - I wish you and your families good health and all the best in your future endeavors – both personally and professionally.

Sincerely,





NPGA Supports Industry During Pandemic

NPGA led industry efforts to persevere through the lingering effects of COVID-19 as well as gradual reopening procedures. Below are examples of NPGA's actions to assist the propane industry's service to consumers and communities across the country.

- Provided updates on Enforcement Discretion documents and Regulatory Guidance protocols by the U.S. Department of Transportation, such as waivers and revised deadlines for Drug and Alcohol Testing requirements and Operator Qualification requirements for jurisdictional systems subject to 49 CFR 192.
- Sought extensions of interstate CDLs and HMEs as well as extending medical examination deadlines and certification requirements.
- Advocated for the inclusion of the propane industry in the initial stages of vaccine allocations, and regularly updated an information database of state vaccine distribution plans.
- Developed guidance on paid leave allowances and requirements by the U.S. Department of Labor.

- Provided guidance on common questions by employers regarding federal laws and procedures to address employee vaccinations.
- Created employer guidance on procedures to address employees with sniff test responsibilities who have temporarily lost the sense of smell due to COVID-19.
- Updated guidance on Paycheck Protection Program loan applications and other available funding opportunities.

These actions supported the propane industry's resilience, allowing it to maintain its "up and running" status and continue to provide services to the customer base. NPGA is committed to see the propane industry through the global pandemic with the latest information, waivers, and other guidance on safety protocols, regulations, and government resources. There are also a number of technical resources, references, and template language on the Member Dashboard of NPGA.org to help navigate the evolving conditions in different states and the new environment in which the industry is operating.



Regulatory

Regulatory Reform

NPGA's regulatory team secured several positive resolutions to regulatory reform initiatives and initiated new efforts advocating for the propane industry. At the U.S. Department of Transportation (DOT), NPGA successfully modified the short-haul operation exemption to expand the air-mile radius to 150 and extend the on-duty service regulation. Additional hours of service regulations were also changed that present opportunities for improved operation efficiencies. NPGA also successfully convinced DOT to correct the cylinder requalification periods, which were previously and erroneously altered by the agency. Further, NPGA received clarification from DOT that PERC educational material could be utilized to train employees on the inspection and requalification of cylinders, which saves the industry thousands of dollars every year. In collaboration with other gas associations, NPGA successfully advocated for the withdrawal of a furnace efficiency proposal by the U.S. Department of Energy that threatened to cause fuel switching, particularly throughout the southern region of the United States.

Harvest Demand

To enhance marketers' ability to plan for their supply needs, NPGA began tracking and sharing a variety of factors affecting the corn crop through data published by the U.S. Department of Agriculture. We supplemented that data with data from PERC's Grain Drying Index and through additional communications with various other agricultural-related trade associations. The corn planting and growing seasons were steady or ahead in all states, but the Midwest experienced a devastating derecho in early August 2020 that caused corn crop loss and damage. NPGA coordinated with the Midwestern state associations and PERC to investigate the crop damage and recovery to gauge the demand for propane.

Advocating with States

In partnership with state and regional associations, NPGA assisted marketers with state-specific regulatory accomplishments. In collaboration with the Western Propane Gas Association, propane marketers in California were able to utilize a special permit in tank recovery following unprecedented wildfires



that struck that state. NPGA and the Pacific Propane Gas Association were also successful in the elimination of additional meal and rest break requirements in Washington hours of service regulations, which caused unreasonable burdens on more than 500 propane field technicians.

Funding Resources

NPGA began tracking funding resources related to the COVID-19 pandemic provided by the Coronavirus Aid, Relief, and Economic Security (CARES) Act in March 2020. The NPGA communications and regulatory team created the Funding Resources page, listing federal and non-federal funding opportunities for COVID-19 relief. After further review, additional grants and incentives were listed. The Funding Resources page lists opportunities from the Small Business Administration (SBA), U.S. Department of Agriculture (USDA), Federal Motor Carrier Safety Administration (FMCSA), and state incentives.

NPGA also partnered with state associations and PERC to apply for a Department of Transportation Community Safety hazmat grant. The Community Safety grant is awarded to applicants providing hazmat training to fire service personnel and new or existing hazmat employees. NPGA assisted the Hawaii, Indiana, Michigan, and Ohio state associations as well as PERC with the overall grant application process. The applications were submitted successfully and all required accounts necessary for the federal grant process were created.





Legislative Affairs

Alternative Fuel Tax Credits

NPGA continues to lobby for a long-term extension of the Alternative Fuel Tax Credit and the Alternative Fuel Refueling Infrastructure Tax Credit to maximize the incentive for American consumers and businesses to adopt autogas vehicles. Late last year, the association worked with Natural Gas Vehicles for America to secure a one-year extension of the credits, set to expire at the end of 2020, which are now eligible through December 31, 2021. The extension of these credits provides planning certainty to propane autogas marketers and customers, and is worth nearly \$200 million annually to the propane industry. In 2021, NPGA will continue to advocate for a long-term extension of the credits and work to avoid any gaps in their availability through short-term extensions, if necessary.

Appropriations

2020 was the second year NPGA engaged lawmakers to secure federal funding for research, development, and demonstration projects through the Department of Energy for propane technologies. In 2019, the Association successfully lobbied Congress to provide \$5 million for propane vehicle engine technology (VET) projects and \$10 million for propane and natural gas combined heat and power (CHP) projects. As a follow-up, NPGA submitted slightly modified requests for VET and CHP, as well as two new requests focused on CHP microgrids and renewable propane. The final FY21 bill included \$5 million for vehicle engine technology and the use of DME, within available funds for CHP microgrids, and within available funds for micro-CHP combined with renewables.

The success of the association's strategy is a clear example of the industry's progress in engaging Democratic legislators on propane's environmental benefits. NPGA is currently executing an updated legislative plan for the FY22 appropriations process and the 117th Congress.

Department of Defense Alternative Fuel Vehicle Pilot Program

NPGA worked with House and Senate stakeholders to include a pilot program for alternative fuel vehicles in the National Defense Authorization Act (NDAA), which President Trump signed into law in late 2020. The program instructs at least two Department of Defense facilities to supplant outdated gasoline and diesel noncombat vehicles with propane, natural gas, or biomass vehicles if the cost differential is 10 percent or less. The creation of the pilot program will help incentivize the adoption of propane autogas in government fleets and provide momentum for NPGA to engage in future NDAA opportunities.

Building Codes

NPGA successfully lobbied against a misguided building codes provisions from the Senate energy bill in the final yearend omnibus legislation. The Association worked with other industry groups, including the National Association of Home Builders and the American Gas Association, to remove the provision, which would have raised housing costs and favored electrification over the use of propane and other traditional energy sources.

COVID-19

NPGA staff continuously engaged Capitol Hill through emails, phone calls, and virtual meetings on priority issues for the propane industry during the ongoing pandemic. As a part of this outreach, NPGA worked with a diverse mix of various industry associations and corporations to secure several legislative wins for the propane gas industry, including \$900 million for the Low-Income Home Energy Assistance Program (LIHEAP) and Treasury Department guidance on the taxability of Paycheck Protection Program (PPP) loan forgiveness.



State Affairs

...it is anticipated that by the end of 2021, more than a dozen states will have energy choice protection laws enacted. 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 2020, NPGA's state affairs program analyzed more than 10,000 bills, actively monitoring more than 700 that offered opportunities or challenges to the industry. In addition, in 2020 NPGA actively monitored 246 utility cases across 43 states. NPGA drafted 12 comment letters and helped prepare testimony for utility proceedings involving natural gas expansion and electrification efforts in 11 states.

In 2020, the industry's primary challenge 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. Resources were deployed for state and regional associations to challenge these proposals. In addition, 10 states went on the offense with legislation to protect consumer energy choice, and Arizona, Louisiana, Oklahoma, and Tennessee successfully signed these into law. In 2021, 21 states introduced similar legislation, and it is anticipated that by the end of 2021, more than a dozen states will have energy choice protection laws enacted.

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, New York, North Carolina, Texas, and West Virginia as well as the Propane Gas Association of New England and Western Propane Gas Association.

Codes & Standards

NPGA's Technology Standards and Safety Committee continued functioning during the COVID-19 pandemic and held its Fall 2020 and Spring 2021 meetings virtually using the Zoom platform. Even so, the meetings were well attended and the committee accomplished a lot, producing several proposals for fast-track letter ballot that were completed in time to make the deadline for submittals to the Technical Committee developing NFPA 58, the LP-Gas Code.

NFPA 58 was delayed by six months in the development cycle for the 2023 edition and as a result, more time was provided to develop and submit proposals. There were over 200 proposals submitted and NPGA accounted for about 40 of them. A few of the significant proposals that were developed by the TS&S Committee and submitted to NFPA include:

- A proposed change in the allowable height to the bottom of a stationary container to allow more clearance for maintenance and to develop head pressure for pumps
- Several proposed changes to allow a new piping material, reinforced thermoplastic piping
- The inclusion of requirements for low emission transfer into DOT cylinders
- Several proposals that will institute formal requirements for the general public to refuel propane-powered vehicles
- Proposals to introduce the concept of mobile vehicle fuel tenders for temporary use
- A proposal to discern between using excess flow valves as a means of protecting container openings and using them to protect liquid piping systems

NPGA continued to advocate for the use of unvented room heaters in high performance "green" buildings. This past year saw NPGA and its coalition partners once again be forced to appeal a proposed change to ASHRAE 62.2, Standard for Indoor Air Quality for Low-Rise Residential Buildings that would have essentially banned the use of unvented heaters in buildings utilizing that standard. NPGA does not expect to learn the outcome of the appeal until after the publication of this report. Regardless, NPGA will continue to advocate for the issuance of codes and standards based on scientifically valid information and not the personal agendas of individuals or groups.

The involvement of NPGA in all codes and standards that affect the propane industry continued as the International Code Council entered into a new development cycle. NPGA participated in meetings of the ICC Fire Code Action Committee and several of its task forces, including those on carbon monoxide detection, mobile commercial cooking operations, trade shows and tents, and mobile fueling operations. NPGA joined the NFPA committee writing a new standard for the installation of smoke detectors, and has applied for membership on committees that will address mobile commercial cooking operations and cannabis processing.

NPGA will continue to advocate for the use of propane as our society moves towards the goal of achieving net zero energy buildings. The primary means of achieving our goal will be ensuring that energy conservation codes and standards utilize full fuel cycle, or "source energy," as the most effective method for establishing performance requirements for the built environment.







Supply & Logistics

In late 2019 and early 2020, global events caused the prices of crude oil and natural gas to reach relatively low levels. Producers responded by drilling fewer wells, reducing production from shale formations, which is the primary source of propane in the U.S. today. With these challenging conditions, NPGA's Propane Supply and Logistics Committee began to meet monthly and hosted the "Preparing for Peak Demand" webinar series in summer 2020 to educate the industry on transportation, pipeline, and global supply issues.

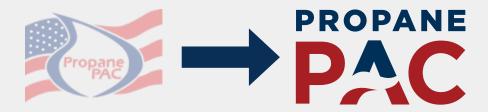
During peak demand season, which culminated with the record-breaking February 2021, NPGA joined state and regional associations in coordinated response and communication among propane marketers, farmers, state and federal officials, and other organizations. NPGA served as a central information hub for federal regulatory

agencies such as the Federal Energy Regulatory Commission (FERC) and Federal Motor Carrier Safety Administration as well as communicating with congressional offices. For the first time, NPGA in conjunction with PERC and the U.S. Department of Agriculture provided weekly crop reports to the propane industry to assist in supply planning.

Use of NPGA's Propane Logistics Analysis
Network tool – also known as PLAN –
continues to grow. The tool provides crowdsourced information of wait times at more
than 400 supply points across the country.
There have been nearly 2,000 reports on PLAN
since its debut in 2019. During peak demand
in February 2021, there were more than 400
reports at 75 locations, with nearly 6,000
page views. To access PLAN, download the
NPGAction app from Google Play or Apple app
store or visit https://plan.npga.org/.



PropanePAC



npga.org/propane-pac

2020 was a banner year for PropanePAC. Confronted with COVID-19 restrictions, it successfully adapted outreach methods and programing to deliver fresh and insightful content to new and existing donors. As a result, the PAC raised \$148,424 this year, bringing total receipts for the election cycle to \$264,360. These contributions made 2020 our most successful fundraising cycle in nearly twenty years.

NPGA's political action committee is one of the association's most valuable advocacy tools and the industry's only political voice in Washington, D.C. The personal, voluntary contributions from members allow NPGA to participate directly in the political process and support candidates for Congress who align with the industry's interests. The PAC enables NPGA to better educate Members of Congress on the policy benefits of propane.

A complete summary of the PAC's activities for 2020 is available in PropanePAC's Annual Report.

About PropanePAC

PropanePAC is a multi-candidate, non-partisan political action committee affiliated with NPGA. It operates to help elect federal legislators who support the policy objectives of the association.

Federal election laws prohibit trade associations from using their general funds generated from dues to contribute to federal candidates. Only eligible employees of NPGA member companies can empower the association to have an active role in the federal election process by contributing their own personal funds to PropanePAC.

2020 PAC Admin Fund

\$5,000 Sponsors









Superior Plus Propane

\$2,500 Sponsors









\$1,000 Sponsors









2020 PropanePAC Contributors

GOLDEN TRANSPORT CLUB \$5,000

Linda Barry
Bergquist, Inc.

Robert Barry

Gerry Misel

Bergquist, Inc. Georgia Gas Distributors

SILVER BOBTAIL CLUB \$2,500

Joseph Armentano No Paraco Gas Corp.

David BarrettBarrett Propane, Inc.

Cynthia Belmont Delta Liquid Energy

Roger BoehlkeBoehlke Bottled Gas
Corp.

Jerry BrickBrick Transport, Inc.

Joseph Buschur McMahan's Bottle Gas

Derek DallingKindsvatter, Dalling &
Associates

Marc Foerster Crystal Flash

Joseph Green Greens Blue Flame Gas Co., Inc.

Michael Hopsicker Ray Murray Inc.

Keith McMahan Tri-Gas & Oil Corp.

Shannon McWhorter Sequoia Gas

Raymond Murray, III Ray Murray Inc.

John O'Neal O'Nealgas Inc. **Andrew Peyton**Superior Plus Propane

D. Frank PlatzDelta Liquid Energy

William PlatzDelta Liquid Energy

Charles Robertson Twin Feathers, Inc.

Randy Sams Sams Gas

Stuart Weidie Blossman Gas

Propane Founders Club \$1,912

Doug AuxierAuxier Gas, Inc. **Gary France**

France Propane Services

Denis GagneEastern Propane Gas

Walton Gresham IIIGresham Petroleum, Co.

Andrew Heaney Tank Farm, LLC

Stephen Kaminski NPGA **Thomas Manson**Eastern Propane Gas

Antia Misel Georgia Gas Distributors

Robert Zeek Jr.Blackhawk Propane Co.





1075 CLUB

\$1.075

Tracy Amburgey Southern States Coop.

John Armentano American Cylinder Exchange

Malcolm Barrett Barrett Propane, Inc.

Jennifer Baxter Greenwell Bros Inc.

Eugene Bissell

John Brooks III Brooks Gas Co., Inc.

Richard Cummings Mulhern Gas Co., Inc. **Amy Dean**

L G Jordan Oil Co., Inc.

Chris Earhart Dixie Gas & Oil Corp.

Rob Freeman Freeman Gas, Inc.

Lisa Gerwitz

Thompson Energy Insurance Srys LLC

Michael Gioffre American Cylinder Exchange

Kim Godlewski **IPS Equipment**

Keith Hanchett

PERS

Thomas Jaenicke **ATomik Creative Solutions**

Stephen Kossuth UGI Corp.

Chad Kroening

Boehlke Bottled Gas Corp.

Andrew Levinson SchagrinGAS, Co.

David Lowe

Pro Image Communications

Nash McMahan Tri-Gas & Oil Co., Inc. **Dominique Monlezun**

Lake Arthur Butane Co. **Daniel Overpeck**

Overpeck Gas

Warren Patterson AmeriGas Propane LP

Roland Penta

Brian Petrovich Barrett Propane, Inc.

Daniel Richardson Conger LP Gas

Jeffrey Shaffer

Shaffer's Bottled Gas Corp.

Jeffrey Stewart Blue Star Gas

Frank Taylor

Taylor Gas Company

Jeffrey Van Groningen

Van Unen/Meirsma Propane

Kris VanAndel

Hopkins Propane

CONGRESSIONAL CLUB



NPGA

Barry Boehlke Boehlke Bottled Gas Mark Denton Blossman Gas

Wayne Kohley

Excel Propane Co.

\$535

\$365

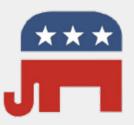
Boyd McGathey

Energy Distribution Partners

David Parker

Parker Gas Co. Joseph Rose

Lin's Propane Truck Corp.



Propane365 Club

Christina Armentano

Paraco Ralph Arrick Jr.

Arrick's Propane

Jerry Breen

Breen Oil Company

Christopher Buschur McMahan's Bottle Gas

Mike Caldarera

NPGA

Raymond Durkin

Durkin Propane

Frank Edwards

Coles Energy

Peter Ferrell

NPGA

Lesley Garland

NPGA

Kenneth Green

Oklahoma Liquefied Gas

Krista Green

Oklahoma Liquefied Gas

Neal Kanel

Stateline Propane Service, Inc.

David Koppenhaver Koppy's Propane

Andrew Lambert

SchagrinGas, Co.

Larry Osgood Consulting Solutions, LLC Mike Rutherford

Rutherford Equipment

Randy Rutherford Rutherford Equipment

Glenn Saunders White Mt. Oil & Propane,

Inc.

Robert Shibley Bob's Cash Fuel

Matt Solak Pacific PGA

Matt Terry

Pinnacle Propane

Edward Varney

RegO

Dave Wager Minnesota Propane Assoc.

Mark Zimora

Tankfarm, LLC



POLITICAL ACTION COMMITTEES

CHS PAC \$1,000

Registered Apprenticeship Program

NPGA continued to engage in workforce development efforts over the last year 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 deliverable was the launch of NPGA's Registered Apprenticeship Program (RAP) in April. The program is approved by the Department of Labor (DOL), and NPGA serves as the administrator of the RAP.

The programs approved for apprenticeship are for two job classifications, propane service technician and driver. Within the driver classification, there are three different RA programs available, including 1) bobtail delivery drivers, 2) transport drivers and/or 3) utility drivers. These programs can be utilized to create a career path for new or existing employees 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 to recruit, train and retain employees.

More information on the program is available on NPGA's website at http://npga.org/apprenticeship-program.









The 2021 Southeastern Convention & International Propane Expo (Expo), originally scheduled to take place April 10 -12, in Atlanta, Georgia, was rescheduled due to ongoing public health and safety concerns. The Expo's location has not changed, and the event will take place at the Georgia World Congress Center in Atlanta, Georgia, October 18 – 20, 2021. The 2021 Fall Board of Director's meeting will take place immediately following Expo, at the Omni Atlanta CNN Center, October 20 – 22, 2021.

We look forward to seeing you at the 2021 Expo in Atlanta, October 18 - 20, 2021 and in Nashville, Tennessee for the 2022 Expo April 24 - 26, at the Music City Center!

Meetings & Conventions

Due to the COVID-19 pandemic, originally scheduled in-person committee and council meetings from Spring 2020 through Spring 2021 were shifted to virtual platforms. NPGA was able to hold these meetings successfully with increased participation by members, buoyed by the hard work of staff, and committee and council leadership.













Business Councils

Benchmarking Council

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. Currently, nearly 150 propane marketers from 125 companies, representing 40 states and Canada, are members of 12 benchmarking groups. During the pandemic, the Council shifted from inperson to virtual meetings to stay connected and share best practices through unprecedented times.

In 2021, the Council plans to resume in-person meetings. Through the contribution of real-life data analyzed in projects 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/membership/business-councils/benchmarking-council/

Cylinder Exchange Council

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 typically holds two meetings every year. Dues are paid on an annual basis to fund the efforts of the Council. 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 2020, the Council only met once due to the COVID-19 pandemic. Members of the Council have been actively working for the adoption of the alternative provisions for protection of cylinder exchange installations from vehicle impact that originally appeared in the 2017 edition of NFPA 58. Additionally, a new requirement that appeared in the 2020 edition of NFPA 58 and which requires a visual inspection of the face seal on cylinder valves, has led to further proposed changes to the 2023 edition of NFPA 58. Council members will actively participate in refining these and other changes related to the operation of cylinder exchange businesses. Although the demand for cylinders during the pandemic has been high, Council members remain committed to providing their customers with propane to meet their needs.











Women in Propane Council

The Women in Propane Council leadership pivoted its focus during the restrictions of 2020 to deliver training, mentoring, and networking to all members of the industry. Workforce development and diversity are at the core of the council's mission.

Council members and industry employees have multiple opportunities to participate in signature programming that has defined a new standard of professional development within the propane industry. During 2020, the pivot to virtual presentations was embraced to reach a wide audience and to deliver meaningful content. Key programs available in 2020 included:

■ DISC on the Virtual Road

• The popularity, power, and productivity of the DISC program are now available virtually to businesses across the country. Contracts to engage with expert DISC trainers are affordable and convenient.

■ WIP Knowledge Exchange | Mentoring Network

- With a new software platform powered by Chronus, mentors and mentees can enroll efficiently and instantly.
- Volunteer mentors work closely via video conference or phone to guide mentees on their chosen career goals,

■ Webinars

- Three educational webinars were organized and presented by the council. Topics ranged from reading financial statements to leadership lessons to trend analysis for operational improvement.
- The success of these points to more webinars and a potential series in the future.

■ Council Business Meetings

 Always a lively forum for council business and ideas, either live or virtual.

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

Awards

Chair's Citations

Chair Randy Thompson awarded seven citations to individuals who have demonstrated extraordinary commitment to the propane industry.



Michelle Bimson Maggi *AmeriGas Propane LP*



Robert Barry *Bergquist, Inc.*



Tonya Crow *GROWMARK Inc.*



Denis Gagne *Eastern Propane Gas, Inc.*



Steve Kaminski *NPGA*



Stuart Weidie *Blossman Gas*



Tucker Perkins *PERC*

State Director of the Year



Amy Jordan Dean *L G Jordan Oil Co. Inc.*North Carolina State Director

Safety Award



Charlie Ory *Posthumously*





NPGF Scholarship Program

Established in 1993, the National Propane Gas Foundation (NPGF) Scholarship Fund fosters educational opportunities by offering \$1,000 and \$2,000 scholarships to the children of National Propane Gas Association member companies to attend college and vocational/technical/trade school. Undergraduate students may apply every year and receive up to four years of support, making the scholarship program one of the most tangible benefits for NPGA member companies and their employees.

The NPGF annually awards scholarships endowed by generous companies, individuals, and state/regional associations. NPGF's additional fundraising efforts allow us to award even more scholarships. The February 2020 Silent Auction netted \$37,000 but the COVID-19 pandemic hampered other fundraising efforts in 2020. The industry champions participating in the 2021 Corporate Partners Campaign are providing critical financial support to the Foundation. As always, your online purchases through the Amazon Smile program continue to benefit the NPGF Scholarship Fund.

For a complete list of our scholarship donors and Corporate Partners, please choose Scholarships under the News & Resources menu on the NPGA website.

NPGF bestowed scholarships to 102 students totaling \$135,000 in the 2020/2021 year. Since its inception, NPGF has awarded more than \$2 million dollars in scholarships to help deserving students achieve their higher education goals.

Member Services

Membership

Communicating with members became even more important as the COVID-19 pandemic changed how people worked. Zoom meetings and phone calls, along with more frequent email alerts, allowed us to collaborate and keep members informed of changes affecting their operations.

A redesigned website and e-newsletter, *The Bobtail*, made it easier for members to find information and up-to-date news. Direct mail postcards were used to convey bite-sized messages throughout the year, and were deployed as a prospecting tool to non-members. Member volunteers made calls to encourage retention and invite dropped members to rejoin.

2017 - 2021 Total Members by Category

	2017	2018	2019	2020	2021
Marketers	2348	2331	2259	2153	2116
Manufacturers	140	137	138	139	127
Distributors	39	40	37	37	32
Producers/Wholesalers	19	18	15	17	19
Transporters	14	14	14	16	9
Services	117	99	102	109	96
International	43	44	42	42	32
Individual	5	5	6	7	6

TOTAL MEMBERS 2,793 2,725 2,688 2,587 2,520

2017 - 2021 Marketer Locations

	2017	2018	2019	2020	2021
Bulk Plants	7,552	7,449	7,662	7,472	7,695
Retail Branches	5,334	5,325	5,409	5,185	5,256
Marketer HQ	2,343	2,266	2,233	2,153	2,116



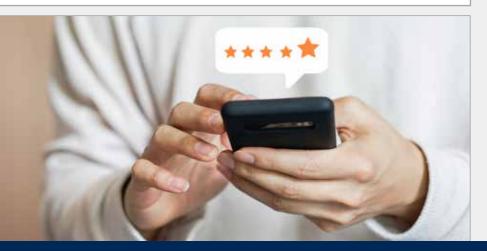




NPGA

NATIONAL PROPANE GAS ASSOCIATION

AFFINITY PROGRAM PROVIDER



Affinity Programs

NPGA continues to work with the affinity partners to promote their programs and expand their offerings. NPGA values the tireless support of the state and regional associations to promote the programs and increase awareness among members. Four new programs were added to the lineup in early 2021, providing a larger array of products and services to NPGA members.



Debt collection & A/R services



Uniform & facility supplies



Supplemental Insurance



Email marketing



Insurance solutions



Tires



Human resources support



Onlines services and products



Compliance system & duty to warn



Office supplies & more

Financial Statements

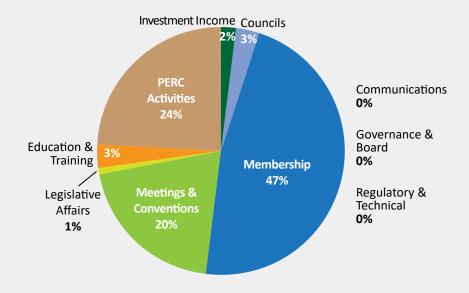
Financial Statements At-a-Glance

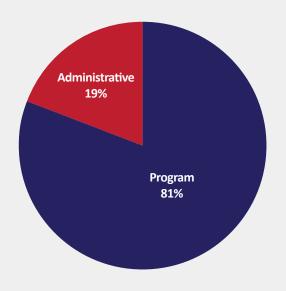
FY 2021 Unrestricted Sources of Revenue (NPGA Only)

Revenue		Amount	Percent
Membership	\$	3,365,210	46.93%
Meetings & conventions		1,414,512	19.73%
Communications		20,308	0.28%
Regulatory & technical		2,431	0.03%
Legislative affairs		43,882	0.61%
Education & training		244,414	3.41%
PERC activities		1,748,491	24.38%
Governance & board		10,400	0.15%
Investment income		125,490	1.75%
Councils		195,326	2.72%
TOTAL REVENUE	Ś	7.170.464	100.00%

Program and Administrative Expenses (NPGA ONLY)

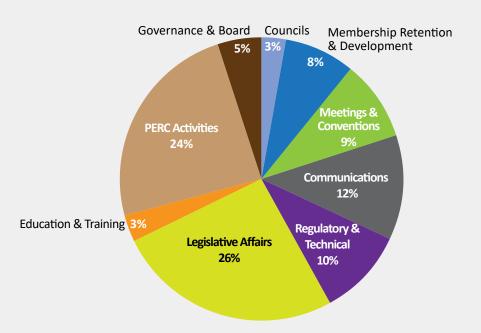
Expense		Amount	Percent
Program	\$	5,166,933	81.07%
Administrative		1,206,833	18.93%
TOTAL EXPENSE	¢	6 373 766	100 00%





FY 2021 Allocation of Program Expenses (NPGA Only)

Expense			Amount	Percent
Membership retention 8	& development	\$	531,620	8.34%
Meetings & conventions	5		568,110	8.91%
Communications			781,882	12.27%
Regulatory & technical			616,699	9.68%
Legislative affairs		1	,626,215	25.51%
Education & training			180,710	2.84%
PERC activities		1	,533,926	24.07%
Governance & board			339,278	5.32%
Councils			195,326	3.06%
	TOTAL EXPENSE	\$ 6	,373,766	100.00%









National Propane Gas Association and Affiliate

Consolidated Statement of Financial Position – With Consolidating Information **February 28, 2021**

(With Comparative Totals for 2020)

	 2021 (C	onsolid	ating Inform	nation)	_			
	NPGA	NPG F	oundation	Eliminations	Conoli	idated 2021	Conoli	dated 2020
ASSETS								
Cash	\$ 265,860	\$	7,047	\$ -	\$	272,907	\$	506,465
Investments	9,856,388		3,928,583	•		13,784,971		12,103,586
Notes receivable	500,000		-		-	500,000		1,000,000
Accounts receivable, net	219,274		100			219,374		262,562
Prepaid expenses and other assets	234,962		878			235,840		185,445
Prepaid convention expenses	88,004		-		-	88,004		245,766
Investment in deferred compensation plans	255,720		-		-	255,720		446,478
Property and equipment, net	42,355		-			42,355		50,756
Deposits	 27,267		-			27,267		25,542
Total assets	\$ 11,489,830	\$	3,936,608	\$	\$	15,426,438	\$	14,826,600
LIABILITIES & NET ASSETS					,			
Liabilities:								
Accounts payable and accrued expenses	\$ 121,577	\$	-	\$	\$	121,577	\$	72,917
Accrued payroll and employee benefits	118,554		-	•		118,554		483,863
Capital lease liability	13,227		-			13,227		17,017
Deferred compensation plan obligations	 255,720		-		-	255,720		446,478
	509,078		-	•		509,078		1,020,275
Deferred revenue:								
Dues	804,370		1,600			805,970		1,073,837
Conventions	85,176		-			85,176		1,299,100
Certified employee training program	82,264		-			82,264		176,679
Business councils and forums	176,998		-	•		176,998		167,882
Other deferred revenue	27,711		-		•	27,711		20,997
Total deferred revenue	1,176,519		1,600		•	1,178,119		2,738,495
Total liabilities	1,685,597		1,600			1,687,197		3,758,770
Net assets:								
Without donor restrictions:								
Undesignated	9,297,227		310,214			9,607,441		7,511,049
Board designated	423,005		255,578			678,583		610,697
	9,720,232		565,792			10,286,024		8,121,746
With donor restrictions	84,001		3,369,216			3,453,217		2,946,084
	9,804,233		3,935,008			13,739,241		11,067,830
Total net assets	 9,004,233		-,,,,,,,,			-,,		

Financials are unaudited and do not represent a full financial statemtent presentation. Please refer to the fiscal year 2021 audit report for full disclosure.

National Propane Gas Association and Affiliate

Consolidated Statement of Activities – With Consolidating Information

Year Ended February 28, 2021

(With Comparative Totals for 2020)

-	202	1 Consolidating Info		_	
	NPGA	NPG Foundation	Eliminations	Consolidated 2021	Consolidated 202
REVENUE AND SUPPORT WITHOUT DONOR RESTRICTIONS:					
Membership dues and lists	\$ 3,365,210	\$ 1,900	\$ -	\$ 3,367,110	\$ 3,411,812
Meetings and conventions	138,996	4,355	=	143,351	1,621,703
Insurance proceeds	1,275,516	=	-	1,275,516	-
Communications	20,308	-	-	20,308	20,720
Regulatory and technical	2,431	-	-	2,431	4,931
Education and training	244,414	-	-	244,414	927,371
PERC activities	1,748,491	-	=	1,748,491	1,066,001
Governance and board	10,400	-	-	10,400	47,655
Investment income	125,490	-	-	125,490	194,836
Councils and forums	195,326	-	-	195,326	259,168
Contributions	-	3,555	-	3,555	11,225
Net assets released from restrictions	43,882	127,500	-	171,382	186,885
Total revenue and support without donor restrictions	7,170,464	137,310	-	7,307,774	7,752,307
XPENSES:					
Program services:					
Membership	531,620	=	-	531,620	408,937
Meetings and conventions	568,110	-	-	568,110	1,063,339
	781,882	-	-	781,882	384,979
Communications				616,699	805,742
Communications Regulatory and technical	616,699	-	-		
	616,699 1,626,215	-	- -	1,626,215	2,604,297
Regulatory and technical Legislative affairs	1,626,215	- - -	- - -	1,626,215 180,710	2,604,297 509,831
Regulatory and technical	•	-	-		
Regulatory and technical Legislative affairs Education and training	1,626,215 180,710	- - - -	- - - -	180,710	509,831
Regulatory and technical Legislative affairs Education and training PERC activities	1,626,215 180,710 1,533,926		- - - -	180,710 1,533,926	509,831 845,851
Regulatory and technical Legislative affairs Education and training PERC activities Governance and board	1,626,215 180,710 1,533,926 339,278		- - -	180,710 1,533,926 339,278	509,831 845,851 676,840
Regulatory and technical Legislative affairs Education and training PERC activities Governance and board Councils and forums	1,626,215 180,710 1,533,926 339,278	-	- - - -	180,710 1,533,926 339,278 195,326	509,831 845,851 676,840 259,168

Continued on following page.

National Propane Gas Association and Affiliate

Consolidated Statement of Activities – With Consolidating Information, continued

Year Ended February 28, 2021

(With Comparative Totals for 2020)

	2021	Consolidating Informa	ation		
	NPGA	NPG Foundation	Eliminations	Consolidated 2021	Consolidated 2020
THER CHANGES:					
Long-term realized and unrealized investment gain					
less the designated amount	\$ 1,271,101	\$ -	\$ -	\$ 1,271,101	\$ 123,160
Pipeline infrastructure defense fund	19,338	-	-	19,338	16,776
Amount released from board designated fund	43,012			43,012	-
Corporate partners program fund	-	48,548	=	48,548	7,657
State engagement initiative	(19,610)	-	-	(19,610)	(104,626)
Sale of CETP testing program	-	-	-	-	1,500,000
Deferred rent adjustment	-	-	-	-	37,391
	1,313,841	48,548	-	1,362,389	1,580,358
Change in net assets without donor restrictions	2,110,539	53,739	-	2,164,278	1,638,182
HANGES IN NET ASSETS WITH DONOR RESTRICTIONS:	42.002	250		44 422	222 244
Contributions Endowment investment income	43,882		-	44,132	233,241
	13,579	620,804	-	634,383	130,100
Net assets released from restrictions	(43,882)	(127,500)	-	(171,382)	(186,885)
Change in net assets with donor restrictions	13,579	493,554	-	507,133	176,456
Change in net assets	2,124,118	547,293	-	2,671,411	1.814,638
Net assets:					
	7,680,115	3,387,715	-	11,067,830	9,253,192
Beginning					

Financials are unaudited and do not represent a full financial statement presentation.

National Propane Gas Association Political Action Committee

Statements of Financia December 31, 2020 and			
		2020	2019
ASSETS			
Cash		\$ 265,360	\$ 197,436
	Total assets	\$ 265,360	\$ 197,436
LIABILITIES & NET ASSETS			
Liabilities: Accounts Payable		\$ 1,000	\$ _
	Total liabilities	1,000	_
Net Assets:			
Net assets-without do	nor restrictions	\$ 264,360	\$ 197,436
	Total net assets	\$ 264,360	\$ 197,436
TOTAL LIABILITIES & NEW	ASSETS	\$ 265,360	\$ 197,436

Statements of Activities Years Ended December 31, 2020 and 2019		
	2020	2019
Revenue and support:		
Contributions	\$ 148,424	\$ 115,121
Donated services and support	70,511	51,553
Total revenue and support	218,935	166,674
Expenses:		
Contributions	81,500	85,500
Donated services and supporting services	70,511	51,553
Total expenses	152,011	137,053
Change in net assets	66,924	29,621
Net assets:		
Beginning	197,436	167,815
Ending	\$ 264,360	\$ 197,436

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

Board of Directors

■ NPGA Officers



NPGA Chair Denis Gagne Eastern Propane Gas, Inc. Rochester, New Hampshire



NPGA Chair-Elect Robert Barry Bergquist, Inc. Toledo, Ohio



NPGA Vice Chair Michelle Bimson Maggi AmeriGas Propane LP King of Prussia, Pennsylvania



NPGA Treasurer Jeffrey Stewart Blue Star Gas Santa Rosa, California



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Brick Transport, Inc.

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J. Nutie Dowdle

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France Propane Service Inc.

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Northwest Gas

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Modern LP-Gas Co.

Robert Mattocks

Williams Energy Group

Robert Mauch

Daryl McClendon

DFM Enterprises

Keith McMahan

Tri-Gas & Oil Co. Inc.

Gerry Misel

Georgia Gas Distributors

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Warren Patterson

AmeriGas Propane LP

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Vacant

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Hawaii Gas

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Superior Plus Energy Services, Inc.

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Superior Plus Energy Services, Inc.

Mexico Director

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INGUSA

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Edinburg, Virginia

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Lakes Gas Co.

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France Propane Service Inc.

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Propane Supply & Logistics

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CHS Inc

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Targa Resources

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Tom Mullaney

Aegis General Insurance Agency (Energy Division)

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Consulting Solutions, LLC

Natalie Peal

Butane Propane News

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Corky Clark

South Carolina Propane Gas Assoc.

Kenneth R. Green

Oklahoma Liquefied Gas Co.

Daniel N. Myers

The Churchill Centre



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