

Energy Share of Montana

and Universal Systems Benefits Funds

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Energy Share of Montana

- Helps Montanans facing energy emergencies
 - Once every ten years
 - 10%-15% of clients repay their assistance
- Established by a group of concerned human service agencies, utility companies and electric cooperatives
- Have helped 53,000 Montana families since 1983





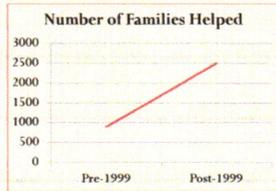
And ...

- In addition to emergency bill assistance we operate some small programs to help with energy conservation.
 - Energy West and MDU fund furnace and water heater safety & efficiency programs, and low-income weatherization
 - Endowment earnings fund a small refrigerator replacement program for elderly and disabled who own their home
 - Help about 220 families a year



Effect of USB funds on Energy Share

- Energy Share started receiving USB contributions in 1999
- The number of families we help increased from an average of 900 per year to 2,500 per year



Human Resource Development Councils (HRDCs) distribute Energy Share funds

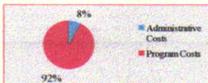
- Energy Share fits well with LIEAP and weatherization
- Each HRDC Coordinates a Local Energy Share Committee 
- Contractual guidelines and local flexibility give people a hand up 
- Applications are reviewed individually 

HRDC Service Areas



What's so great about Energy Share?

- Helps many of your constituents who, through no fault of their own, find themselves in tough circumstances and need some help
- Has a low admin rate
- Is funded in the private sector
 - Individuals
 - Small businesses
 - USB contributions





USB Funds + Energy Share = A Good Deal for Montana

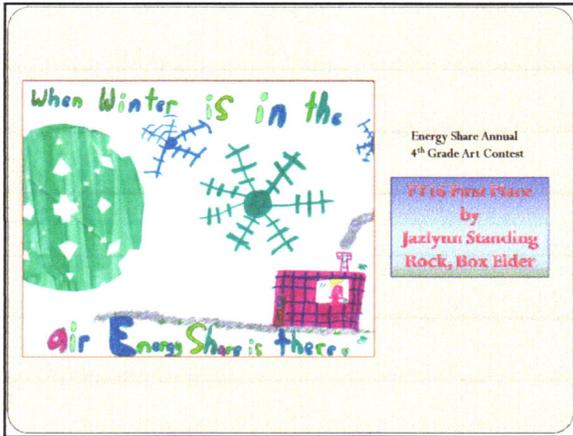
- All entities that pay USB funds are supportive of Energy Share:
 - Utility companies
 - Electric cooperatives
 - Large electric users (many of which continue to *choose* to donate at least some of their USB funds to Energy Share even though they have the option to self-direct)

Conclusion

- USB funding has had a huge impact on Energy Share's ability to help Montanans
- Assistance decisions are made locally
- USB has had 17 years of success:
 - It requires no state money
 - It saves energy and helps people in need
 - It doesn't need to be fixed!



The Energy Share Board looks forward to your continued support of Universal Systems Benefits.





Montana-Dakota Utilities Co.
Universal System Benefits Program Overview
2015

Montana-Dakota's electric Universal System Benefits programs are used primarily to fund low income programs providing assistance to Montana-Dakota's customers located in Eastern Montana.

Montana-Dakota collected \$1,066,099.06 in funds from all customers in calendar year 2015. Of that total amount \$308,807.21 was collected from the large customer group defined as customers with electric billing demands of 1,000 kW or higher. This represented an increase of \$9,935.41 over total dollars collected in 2014 with the large customer group revenues representing an increase of \$21,173.02 over 2014 large customer group revenues collected.

The 2015 portfolio of programs was unchanged from 2014. Approximately 78 percent of the dollars collected, excluding large customer dollars, funded low-income programs. The programs include a low-income discount applicable to customers qualifying for Low Income Energy Assistance Program (LIHEAP), weatherization, energy audits, furnace safety and bill assistance. The programs are administered by Energy Share of Montana, Action for Eastern Montana and HRDC District 7. The remaining dollars spent funded program promotion and energy conservation programs.

An unexpended balance of \$194,959.11 was remitted to the Department of Revenue in accordance with 69-8-402 (MCA). \$31,769.46 of this amount represented dollars collected from the large customer group that were not claimed by those customers.

Montana-Dakota's 2015 Report remitted to the Department of Revenue does require a revision to reflect a change in the amount claimed by a large customer that was submitted on timely basis but not correctly reflected in the Report. This change in the amount claimed affects the carryforward reported on page 4 of the report. The 2015 claim was in the amount of \$226,897.45 resulting in a revised carryforward amount of claims of \$240,616.25. The amount paid to the customer or the amount remitted to the Department of Revenue did not change.