



2020 BUDGET

PROPANE EDUCATION & RESEARCH COUNCIL Budget Plan for Calendar Year 2020

In accordance with PERA, this budget includes functions to develop programs and projects that will result in entering into contracts or agreements for implementing the Act, including programs to enhance consumer and employee safety and training, to provide for research and development of clean and efficient propane utilization equipment, to inform and educate the public about safety and other issues associated with the use of propane, and to provide for the payment of the costs thereof with funds collected pursuant to this Act. Furthermore, this budget complies with that part of the Act requiring that issues related to research and development, safety, education, and training be given priority by the Council in the development of its programs and projects.

All resources and expenditures outlined in this budget plan will be audited by a certified public accountant shortly after said resources and expenditures are realized for the 2020 year.



EXECUTIVE SUMMARY

Four strategic objectives guided the development of the 2020 Budget Plan:

- Develop professional, informed, and skilled workforce and trade allies through world-class training.
- Increase propane's voice in the national energy conversation through data-driven, provocative, and assertive messaging — continuing the push to achieve a comprehensive digital transformation.
- Engage in appropriate commercialization efforts to create market growth opportunities.
- Grow the autogas market through industry adoption, the development of applications, service networks, and commercialization support of applications in the market.

Develop professional, informed, and skilled workforce and trade allies through world-class training.

Our workforce training is preparing to enter a new era that expands its use of technology to increase opportunities for sales and safety training across multiple platforms. World-class training that seamlessly incorporates marketing messages will be a cornerstone of workforce outreach.

Training trade allies will be crucial to propane's success in 2020 and beyond. It will involve developing and packaging career and vocational education curricula, delivering CEU training for influencers and allied trades on the benefits of propane applications; and helping states deploy external-audience training.

Increase propane's voice in the national energy conversation through data-driven, provocative, and assertive messaging.

Thought leadership on clean energy has never been more important to Americans, and propane professionals have the expertise, the talent, and the clean energy to take the lead. We will expand our national public-relations program and outreach to influencers to challenge competing energy sources and support industry partners with research and data necessary to further the aims of the propane industry. The program will cultivate, use and share R&D data and analytics, including emissions R&D, along with new messaging and creative content, based on data, science, and research.

Engage in appropriate commercialization efforts to create market growth opportunities.

Our business development program in 2020 will continue to lead the way to growth by nurturing relationships with manufacturers, distributors, and dealers; promoting cross-selling opportunities; exploring the future of power generation; and engaging with trade allies in the development, promotion, and adoption of appliances, vehicles, and equipment that runs on propane. It will also pursue ways to help the propane industry take advantage of developments in renewable propane and DME.

In the residential market sector, we will promote existing outdoor living applications, strengthen sales channel relationships and marketing, and pursue opportunities to commercialize next-generation gas water heaters (formerly ventless-condensing). The focus in the commercial



sector will be market sales training, marketer resources, outreach, and product commercialization. We will also pursue new forklift and material handling offerings and new mobile agriculture applications.

We will help propane professionals leverage materials, messages, and sales training as they go after new business, and we'll work with industry leaders to identify operational efficiency and innovation through such opportunities as tank monitoring and the Internet of things.

Grow the autogas market through industry adoption, the development of applications, service networks, and commercialization support of applications in the market.

We will focus on technologies that the industry can use in their fleets, with crossover opportunities in other markets, such as medium-duty applications, aftermarket conversions, and so on.

The Proposed 2020 Budget assumes a draw upon reserves set aside for market opportunities of approximately \$773,000 to pay for the first-year incremental costs to purchase the CETP Certification Program from the National Propane Gas Association (NPGA). The purchase terms include three annual payments of \$500,000. The additional funds are required to pay for three headcount additions and incremental program development costs. The headcount additions will allow PERC to support and enhance the program using inhouse subject matter personnel and significantly reduce reliance on outside consultants. The budget only assumes revenue from the program during the first year of transition of \$610,000. We expect that in subsequent years, the program will generate historical revenue levels to cover the additional operating costs.

PERC anticipates a reserve balance in excess of \$11 million to begin the 2020 operating period. As discussed during the development of the 2019 budget, PERC would like to maintain a reserve that includes two components: an operating reserve of approximately 20% of operating expenses or about \$8 million, and an opportunity reserve of \$2 million to \$3 million to allow PERC to take advantage of unique market opportunities. We propose to draw down \$773,000 from the opportunity reserves to make the investment in CETP Certification.

PART I. ASSESSMENTS, INVESTMENT INCOME, AND OTHER RESOURCES

The federally authorized assessment on odorized propane is the principal source of funding for PERC. PERC collects late payment fees and interest on assessments that are paid after the due date. PERC receives income from the investment of assessment funds pending their disbursement. PERC also may receive grants and other funds from government agencies and private organizations, but such resources have not been planned in the 2020 budget.

Assessment Collections. Assessment revenues of \$41,854,183 are projected for 2020 based on an assessment rate of 0.5 cents per gallon.

Investment Income. Investment income in 2020 is estimated at \$200,000. Investment income is affected by market conditions as well as the timing of assessment collections and funds



disbursed for operating expenses, grants, projects, and state rebates. All funds are invested in accordance with PERA.

Deobligations. Unused funds from projects and specifically funded activities completed in 2020 to be returned to the general treasury are estimated at \$500,000.

Estimated Beginning Fund Balance. Funds available from 2019 are projected to be \$10,900,000.

PART II. GENERAL EXPENDITURES AND CAPITAL INVESTMENTS

Administrative Expenses. Administrative expenses in 2020 are budgeted at \$2,717,488. Under PERA, administrative expenses may not exceed 10 percent of funds collected during the year. The proposed administrative expenses are estimated at 6 percent of assessment funds the Council expects to collect for 2020. In accordance with PERA, no funds are used to compensate members of the Council, who all serve as unpaid volunteers. Of the 21 members of the Council, only the three public members may be reimbursed for travel expenses and only for attendance at Council meetings.

Assessment and Collections. PERC estimates its assessment and collection expenses to be \$90,000 in 2020. These costs are primarily based on an allocation of a portion of the costs incurred under a contract with PERC's outsourced accounting service that manages assessment collections.

Depreciation Expenses. PERC has made and is planning to make capital expenditures. Depreciation on these expenditures is estimated to be \$60,500 in 2020.

Capital Investments. PERC is planning capital investments of \$40,000 in 2020. The 2020 Capital Budget primarily represents information technology (IT) program initiatives.

PART III. STATE REBATES

By operation of the law and the rules adopted by the Council, 20 percent of assessment collections are rebated to the states. If the budgeted assessment collections are realized, the total expenditure for the state rebate program in 2020 is budgeted at \$8,370,837.

PART IV. PROGRAM AND PROJECT EXPENDITURES

PERA requires PERC to *"develop programs and projects and enter into contracts or agreements for implementing this Act, including programs to enhance consumer and employee safety and training, to provide for research and development of clean and efficient propane*



utilization equipment, to inform and educate the public about safety and other issues associated with the use of propane. ..."

There is \$32.7 million budgeted in Program funding that includes \$27.4 planned for docketed projects and program activities, as well as \$5.3 million estimated for program salaries, benefit costs, and IT support costs.

The projects and initiatives described in the following sections are based on a recommendation from PERC's Budget and Finance Committee in collaboration with PERC's Executive Committee, the staff, and other sources. On July 17, 2019, the Council approved the distribution of the proposed budget for the limited purpose of soliciting public comment. While the descriptions to follow provide insight into the overall program plans of PERC, actual funding will be considered on a docket-by-docket basis for 2020.

Other requirements under PERA included in the program budget initiatives are as follows:

- Not less than 5 percent of the funds collected through assessments pursuant to the Act will be used for programs and projects intended to benefit the agriculture industry in the United States. The Council will coordinate its activities in this regard with agriculture industry trade associations and other organizations representing the agriculture industry.
- The Council shall coordinate its activities with industry trade associations and others as appropriate to provide efficient delivery of services and to avoid unnecessary duplication of activities.

PROPOSED 2020 PROGRAM NARRATIVE

WORKFORCE TRAINING & INDUSTRY RELATIONS

Developing a skilled workforce requires engagement with state entities, propane marketers and propane professionals to increase usage and execution of PERC's resources and programs. This will allow us to translate aspirations into tangible results.

We will maintain our presence and participation at state meetings, marketer events, industry conferences and trade shows, in order to promote and educate the industry on consumer education efforts, market development outreach, and safety and training programs.

We gained momentum in 2019 by conducting regional meetings and encouraging open dialogue with state executives and their leadership to discuss opportunities and needs in their regions across all core PERC functions. Eight region meetings are planned for 2020.

Other notable 2020 programs and events that will increase marketer, state and region engagement efforts include:

- Can-Do Marketing Training
- CSR Customer Service Training
- Marketer Sales Training
- Sales Summits
- State Marketing Campaigns/Plans



- Workforce Outreach

Investments will be made to these core training programs which are complementary in building a pathway to sustained growth. The programs will strengthen the foundational technical knowledge and the business acumen needed to go after new markets, service and maximize existing customers, and grow the propane industry. Throughout 2019, the focus for sales training was on creating and deploying new content through two prongs: the launch of the new learning management system, or LMS, and the piloting of sales summits. Both were met with positive reviews. In 2020, we will continue to promote these programs and integrate the availability of this training into state outreach efforts and with other industry members. We will host four sales summits and 10 CSR classes, while continually promoting and monitoring the online Sales Training Program.

Collaboration among PERC's industry relations, communications, and business development teams will ensure that programs and communications are relevant to the industry's current business environment, the specifics of the marketplace, and its customers and competition.

Workforce outreach and recruitment programs will be executed at the state level through the execution of the pilot grant programs. PERC's national efforts and program resources will continue to be promoted, and new programs can be created as needed to address changes in the workforce environment. In 2020, this program will transition to a fully available workforce recruitment grant program at the conclusion of the current pilot program. Additionally, PERC will host a conference to engage the propane industry and to partner with adjacent influencing organizations.

The Certified Employee Training Program will be redesigned and see increased investment in 2020, as we develop task-based training modules and pursue methods to make critical material accessible across many platforms, and more engaging for the learner. We will use an LMS that will grow with the industry and the needs of an evolving workforce.

INTEGRATED COMMUNICATIONS WITH ALL AUDIENCES: PROPANE CAN DO THAT™

A strategic priority for 2019 has been realized: PERC outreach to all markets now has consistent messaging, a unified look and feel, a common theme (Propane Can Do That®), and the same home, propane.com.

Homeowners, business owners, on-road and off-road fleet managers, growers, construction professionals, propane professionals, and energy influencers all see and hear strategically integrated messages that are designed to promote safety, drive adoption of propane equipment, secure propane's place in the energy conversation, and position the propane industry as a good place to work.

Given the campaign success, we plan to continue making a significant investment in the Propane Can Do That® outreach to help drive market growth and we will increase investment in thought leadership outreach to energy influencers.



National Energy Conversation

As part of the integrated campaign, thought leadership is an initiative to make propane part of the national energy conversation, and to counteract claims made by competing fuels to thought leaders that influence all markets. The thought leadership program will position PERC as the go-to resource for information on clean American energy, including renewable fuels. Items produced for this initiative will echo and reinforce the content and messaging being used in the markets and provide additional resources to be leveraged back to the consumer and business audiences, as well.

Residential

In 2020, we will continue using geographic targeted messaging focused across climate zones while using more data-driven and provocative messaging versus competing energy sources. Outreach to the commercial and residential markets will be integrated with the Propane Can Do That campaign, which will be digitally dominant with value propositions tailored to the target audience. There will be increased investments to engage the commercial market sales channel and influencers, and we have identified a budget for that increased commercial effort.

The redesigned propane.com will allow for tailoring of content to the visitor based on their geographic location. This will allow for the most relevant messages to be delivered to the relevant audience, which supports the digitally dominant outreach we'll use to reach target audiences.

The residential and commercial markets will continue to see modest overall growth as the economy stabilizes and buyer confidence increases. It is expected that housing demand will continue to exceed supply through 2022, which will lead to higher remodeling activity. Additional factors that will positively impact this segment include availability of land for development outside of natural gas distribution lines, a normalization of mortgage rates, decreased unemployment rates, and increased consumer confidence. As one of the largest consumer segments, millennials will dominate renovation activity, while being generally priced out of the new construction market, they will be heavily engaged in the re-sale and remodeling market. So, targeting these influencers is critical.

Propane space heated households are beginning to rebound from the declines experienced from 2006 to 2012, where propane space heated homes slipped from 6.46 mm to 5.54 mm. The Northeast has the highest market share of propane space heating due to the large number of isolated rural communities and extreme winter weather. Both New England and Middle Atlantic regions are seeing growth in propane heated homes due to fuel oil conversions and new construction. While total propane space heating households have increased slowly since 2012, propane heated homes have not kept pace with new construction growth, where electric has been dominant.



Propane lost market share of the overall new housing construction market due to increased construction in the South Atlantic, which represented 30.2 percent of all US housing starts. Propane's share in the South Atlantic declined from 2.7 percent to 0.65 percent. Electricity is dominant in new construction in the South Atlantic where its market share increased. East North Central, West North Central, Mountain and Pacific have experienced stable or rising market share since 2012. However, in the South Atlantic, East South Central, and West South Central, the downward trend started in 2006 has continued.

Propane water heating increased from 4.2 mm to 4.6 mm households, a market share increase from 3.6 percent in 2005 to 3.9 percent in 2015. However, this growth is largely confined to two regions, the Northeast and the Midwest. The Northeast has experienced the largest growth, increasing from 300,000 to 1 mm households, and the Midwest, where propane water heated households number 1.5 mm and represent the highest market share of any region, with 5.7 percent of households in 2015 (up from 5 percent in 2009). The development of a next-generation water heater, with applicants in the residential and commercial markets, is a strategic priority and will drive engagement priorities to identify potential partners.

In the residential market, we will put a strategic focus on outdoor living opportunities, which provides a growth opportunity with consumers who are not homeowners, and growth in the manufactured/modular housing markets. While this may not demonstrate immediate results, it is an entry point that allows us to develop relationships with younger generations.

Commercial

The commercial market sector represents about 20 percent of all propane demand on an annual basis. Commercial demand is less affected by weather than residential sector, which helps explain why market share has remained somewhat stable during warm and cold winters alike.

There were over 9.6 million commercial buildings in the U.S. in 2012, which is a 14 percent increase from 2003. Overall commercial fuel consumption increased 7 percent from 2003 to 2012. Over that period, buildings using electricity saw a total fuel usage increase of 19 percent, where buildings using propane saw their total fuel usage decline by 12 percent over the same period. However, the number of commercial businesses that use propane increased by 17 percent in that same time frame.

The commercial market, with varying types of infrastructure and associated needs, tends to be more diverse in customer type and decision maker. An increased effort to identify the explicit needs of each building type and addressing the decision maker audiences, along with combatting the competing energy sources in commercial buildings will be an increased focus in 2020.

Given the overarching market trends in the residential and commercial markets, it is more important than ever to continue to target those individuals and organizations that are critical to the specification of propane and propane applications in homes, commercial facilities, and on jobsites. These individuals and organizations include builders, general contractors, architects, engineers, plumbers, and HVAC contractors, among others. The program plans to include targeted outreach regarding zero net energy (ZNE) and propane's value in green building, national builder engagement and the use of propane in the major appliance areas in new construction specific to developments and communities, regional and custom builders outreach,



electric water heater replacement especially when there is already propane in the home, outdoor amenities in regions where extending the outdoor living season is reasonable, and regaining market share in manufactured and modular housing, along with other high-level priorities.

Autogas

In the school bus market, propane autogas continues to maintain consistent annual growth as more fleets become repeat buyers, which helps to make our fuel and technology a more acceptable choice for other fleets interested in propane. Today, there are over 17,000 propane school buses transporting approximately 1 million students to 900-plus school districts in 48 states. Continued low prices for diesel and gasoline, the accelerated move to replace diesel engines with gasoline engines (especially class 5-7 vehicles), and the rapid adoption of so-called clean diesel and electric vehicles are significant market forces that can hurt propane sales. To counter these trends, we will execute a more sustained, year-round outreach initiative that will focus on increasing engagement with OEM's, dealers, private contractors, and school district fleet managers. Other influencers include school boards and parents, who have a vested interest in seeing that their children are safely transported to school in environmentally friendly, reliable buses, and the school business officials who can most directly see the value that propane brings to their school district.

In 2020, school transportation will continue to be our highest priority for propane autogas marketing, outreach, and communications efforts. Our primary objective is to continue capitalizing on the substantial opportunity for growth in this market. We plan to leverage opportunities to demonstrate that investments in propane provide the best return on that investment for emissions reduction, savings benefits for the end user/community, and continue to further market growth. Tactics will include exhibiting, speaking, and sponsoring events where school transportation managers and decision makers are present both nationally and on a state level. Activities will include earned media, paid media, and bus dealer training, education, and support activities.

We will continue to focus on key autogas vertical market segments, including transit and paratransit, beverage, bakery, pickup and delivery, police, towing and recovery. The propane industry will be supported through continued education, training and engagement of the sales channels to increase awareness of the advantages propane autogas provides to public and private fleets. We will do this through earned and paid media, conferences, tradeshow and events, dealer engagement, training, including technician training through our affiliation with NAFTC, and targeted outreach to key associations and stakeholders.

In 2020 we will be engaging and communicating the autogas market opportunity to the propane industry. We will provide the propane industry with the tools, resources and materials needed to successfully incorporate autogas customers into their business strategy and to successfully execute their plan. We will promote the benefits of adopting propane autogas-powered vehicles as compared to the costs associated with maintaining a diesel-powered fleet.

In the fleet markets, the competition is equally aggressive, but the effect of the favorable pricing environment increases the benefits of adopting existing propane technology. In this market we will be promoting the existing technologies and prime the audience for products under development such as the high-efficiency, heavy duty engine. We will also promote a future



vision by funding initial investments in aftermarket EPA certifications, type D school buses and hybrid autogas technology. These technologies will be critical to remain relevant in these markets.

Material Handling

Propane's market share within the North American factory-order forklift market, where propane competes (classes 4 and 5), have increased each year: from 71 percent in 2013 to 73 percent in 2018, while gasoline and diesel market share have seen declines over the same period. Class 1 electric forklift market share, which directly competes against class 4 and 5, has remained stable at 17-18 percent.

To build on this positive momentum, core activities in the material handling market will focus on aggressively marketing propane and propane-powered forklifts, engaging equipment dealers and distributors, and connecting marketers with equipment dealers. Marketing campaigns will increase the reach of propane messaging.

Ports and heavy-duty forklifts will see an elevated level of attention and effort in 2020. Targeted toward traditionally diesel-dominant forklift and port applications, outreach efforts will focus on building brand awareness and equity through strategic marketing campaigns focused on telling the propane story, dispelling inaccurate perceptions, and directly comparing true emissions, operational costs, and the total cost of ownership.

To complement the outreach campaigns, we will undertake direct equipment dealer engagement efforts, including direct communications with equipment dealers via PERC's dealer lists, as well as targeted engagement of key forklift manufacturers for co-marketing, technology development, and product launch activities.

The threats to continued growth in the material handling space are driven by the new and continuously improving battery technology, corporate-based carbon reduction goals, state regulations, and legislation supporting electric-only operation indoors spreading to other regions. Additionally, most new forklift sales are occurring in segments where internal combustion engines and, more specifically, propane have no products or technology answers at present (namely, class 2 and 3). Therefore, we will continue to work with equipment manufacturers to design and develop efficient, clean and affordable propane solutions for tomorrow, and continue the development and commercialization support for the exhaust emissions controls and hybrid technology projects underway.

Straightforward engagement with the propane industry will be critical to success in this market. We will focus on communicating and supporting those activities that marketers can undertake to engage decision-makers and to allow propane marketers to be more proactive to changes in the market.

SAFETY & TECHNICAL TRAINING

PERC will be refocusing and investing in safety, education, and technical training in the 2020 budget. A significant change will be the addition of internal staff to support safety, compliance, curriculum development, and the delivery of educationally related programs. The addition of a



PERC-managed learning management system will provide a variety of opportunities for PERC in the delivery of programs, not just for safety and technical training but across all of PERC's mission areas. As part of the 2020 budget, these new resources will support safety and the safe use of propane products as core messaging platforms for each market.

A strategic shift in the way existing educational, safety, and compliance programs are delivered and consumed will be part of the 2020 budget. Moving programs to a shorter, task-based methodology will improve the effectiveness of programs while offering users the ability to customize training and educational programs to fit the specific needs of employees and organizations. A significant portion of the CETP program is not available in an e-learning format; part of the 2020 budget will focus on moving all the PERC programs to an e-learning format to support the new modular delivery structure. Additionally, consumer safety and safety messaging will continue to be leveraged and will be disseminated through our existing channels, at no additional cost.

In 2020, safety and technical training programs will be leveraged to support workforce development efforts and to support educational outreach to industries that support the propane industry. This support will occur through interaction with post-secondary schools, driving schools, and workforce development organizations. PERC will use both newly developed and repurposed existing assets to customize programs to specifically support these efforts. Another area safety and technical training will support in 2020 is our autogas initiatives. Autogas technician training, safety programs, and other autogas safety-related programs will be part of the ongoing effort of safety and technical training.

Lastly, safety and technical training will continue to enhance and produce consumer safety messaging and end-user safety programs. In 2020, we intend to use digital outreach and messaging tied to both the residential and commercial consumer audience. Traditional safety messaging, such as preparation for winter and adverse weather occurrences, will continue to be sent to customers by way of PERC state and regional propane organizations and by propane marketers. The messaging is still fresh and relevant for today's consumers.



PART V. 2020 BUDGET SUMMARY

SOURCES OF FUNDS

REVENUES

Assessment Collections	\$41,854,183
CETP Certification/LMS User Fees	\$610,000
Investment Income	\$200,000
TOTAL REVENUES	\$42,664,183

DEOBLIGATIONS

\$500,000

BEGINNING BALANCE

\$10,900,000

Total Sources of Funds

\$54,064,183

DISTRIBUTION OF FUNDS

ADMINISTRATIVE EXPENSES

\$2,567,488

OTHER EXPENSES

Assessment and Collections	\$90,000
Depreciation Expenses	\$60,000

Total Other Expenses

\$150,000

STATE REBATES (20 Percent of Assessment Collections)

\$8,370,837

PROGRAMS:

Program Labor	\$4,567,213
Program Staff Benefits	\$750,240
IT Support	697,766
Operating Program Funding	\$27,420,500

Total Program Funding

\$33,435,719

Total Distribution of Funds

\$44,524,044

FUND RESERVE FROM 2019

\$9,540,139

2020 CAPITAL EXPENDITURE BUDGET

\$40,000



2020 Proposed Program Budget Detail

Market	Activity Type	2019	2020	Variance
		Budget	Budget	
			Total	
Agriculture		(\$758,216)	\$0	(\$758,216)
	Consumer Outreach	\$398,000	\$475,000	(\$77,000)
	Incentive Programs	\$400,000	\$0	\$400,000
	Industry Outreach	\$40,000	\$90,000	(\$50,000)
	Influencer Outreach	\$450,000	\$475,000	(\$25,000)
	Product Development	\$701,832	\$1,103,000	(\$401,168)
	Total	\$ 1,293,616	\$2,143,000	(\$849,384)
Autogas	Consumer Outreach	\$750,000	\$750,000	\$0
	Industry Outreach	\$50,000	\$50,000	\$0
	Influencer Outreach	\$725,000	\$725,000	\$0
	Market Research	\$75,000	\$75,000	\$0
	Product Development	\$1,820,942	\$1,821,000	(\$58)
	Safety & Technical Training	\$100,000	\$300,000	(\$200,000)
	Strategic Partnerships	\$100,000	\$100,000	\$0
Total	\$ 3,620,942	\$3,821,000	(\$200,058)	
Business Development	Program Support	\$400,000	\$575,000	(\$175,000)
	Strategic Partnerships	\$50,000	\$75,000	(\$25,000)
	Technical Research	\$500,000	\$630,000	(\$130,000)
	Total	\$ 950,000	\$1,280,000	(\$330,000)
Commercial	Consumer Outreach	\$0	\$230,000	(\$230,000)
	Industry Outreach	\$0	\$25,000	(\$25,000)
	Influencer Outreach	\$197,000	\$590,000	(\$393,000)
	Product Development	\$200,000	\$250,000	(\$50,000)
	Program Support	\$12,500	\$0	\$12,500
	Safety & Technical Training	\$17,500	\$50,000	(\$32,500)
	Strategic Partnerships	\$0	\$10,000	(\$10,000)
	Total	\$427,000	\$1,155,000	(\$728,000)
Corporate Communications	Digital Strategy & Analytics	\$0	\$400,000	(\$400,000)
	Industry Outreach	\$309,500	\$350,000	(\$40,500)
	Program Support	\$400,000	\$400,000	\$0
	Thought Leadership	\$0	\$900,000	(\$900,000)
	Total	\$709,500	\$2,050,000	(\$1,340,500)
Material Handling/Industrial	Consumer Outreach	\$350,000	\$300,000	\$50,000
	Industry Outreach	\$50,000	\$50,000	\$0
	Influencer Outreach	\$600,000	\$550,000	\$50,000
	Market Research	\$30,000	\$50,000	(\$20,000)
	Product Development	\$370,000	\$550,000	(\$180,000)
	Safety & Technical Training	\$50,000	\$50,000	\$0
	Strategic Partnerships	\$30,000	\$70,000	(\$40,000)
	Total	\$ 1,555,000	\$1,620,000	(\$65,000)
Outdoor Power Equipment	Consumer Outreach	\$175,000	\$200,000	(\$25,000)
	Incentive Programs	\$300,000	\$300,000	\$0
	Industry Outreach	\$50,000	\$100,000	(\$50,000)
	Influencer Outreach	\$875,000	\$500,000	\$375,000
	Market Research	\$30,000	\$30,000	\$0
	Product Development	\$50,000	\$150,000	(\$100,000)
	Safety & Technical Training	\$50,000	\$50,000	\$0
	Strategic Partnerships	\$70,000	\$70,000	\$0
	Total	\$ 1,600,000	\$1,400,000	\$200,000
Presidential Discretionary	Presidential TBD	\$500,000	\$300,000	\$200,000
	Total	\$500,000	\$300,000	\$200,000
Propane Industry	Industry Outreach	\$1,721,000	\$929,000	\$792,000
	Market Research	\$670,000	\$570,000	\$100,000
	Program Support	\$490,000	\$490,000	\$0
	Safety & Technical Training	\$1,850,000	\$2,953,000	(\$1,103,000)
	Strategic Partnerships	\$1,719,500	\$719,500	\$1,000,000
	Technical Research	\$0	\$600,000	(\$600,000)
	Workforce Outreach	\$800,000	\$800,000	\$0

	Total	\$7,250,500	\$7,061,500	\$189,000
Residential	Consumer Outreach	\$3,000,000	\$4,000,000	(\$1,000,000)
	Incentive Programs	\$1,500,000	\$500,000	\$1,000,000
	Industry Outreach	\$0	\$25,000	(\$25,000)
	Influencer Outreach	\$1,773,000	\$1,230,000	\$543,000
	Market Research	\$225,000	\$235,000	(\$10,000)
	Product Development	\$200,000	\$150,000	\$50,000
	Program Support	\$112,500	\$0	\$112,500
	Safety & Technical Training	\$157,500	\$425,000	(\$267,500)
	Strategic Partnerships	\$25,000	\$25,000	\$0
	Total	\$6,993,000	\$6,590,000	\$403,000
Grand Total		\$ 24,899,558	\$27,420,500	(\$2,520,942)

Activity Type

Market	Consumer Outreach	Digital Strategy & Analytics	Incentive Programs	Industry Outreach	Influencer Outreach	Market Research	Presidential Discretionary	Product Development	Program Support	Safety & Technical Training	Strategic Partnerships	Technical Research	Thought Leadership	Workforce Outreach	
Agriculture	\$475,000			\$40,000	\$475,000			\$1,103,000		\$50,000					\$2,143,000
Autogas	\$750,000			\$50,000	\$725,000	\$75,000		\$1,821,000		\$300,000	\$100,000				\$3,821,000
Business Development									\$575,000		\$75,000	\$630,000			\$1,280,000
Commercial	\$230,000			\$25,000	\$590,000			\$250,000		\$50,000	\$10,000				\$1,155,000
Corporate Communications		\$400,000		\$350,000					\$400,000				\$900,000		\$2,050,000
Material Handling/Industrial	\$300,000			\$50,000	\$550,000	\$50,000		\$550,000		\$50,000	\$70,000				\$1,620,000
Outdoor Power Equipment	\$200,000		\$300,000	\$100,000	\$500,000	\$30,000		\$150,000		\$50,000	\$70,000				\$1,400,000
Presidential Discretionary							\$300,000								\$300,000
Propane Industry				\$929,000		\$570,000			\$490,000	\$2,953,000	\$719,500	\$600,000		\$800,000	\$7,061,500
Residential	\$4,000,000		\$500,000	\$25,000	\$1,230,000	\$235,000		\$150,000		\$425,000	\$25,000				\$6,590,000
Total	\$5,955,000	\$400,000	\$800,000	\$1,569,000	\$4,070,000	\$960,000	\$300,000	\$4,024,000	\$1,465,000	\$3,878,000	\$1,069,500	\$1,230,000	\$900,000	\$800,000	\$27,420,500