




2011 Membership Report

ANNUAL MEETING SUMMARY

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- Update of Membership Statistics
 - 2011 Membership Plan Update
 - 2012 Membership Plan

October 12-14, 2011



Membership Pursuit is a Full Time Job!

Membership is Everyone's Job!

Membership is a Selling Process!



Where Do We Go From Reaching
100 Plus Members?

Staying Relevant Through A Constantly
Changing Political and Regulatory
Landscape

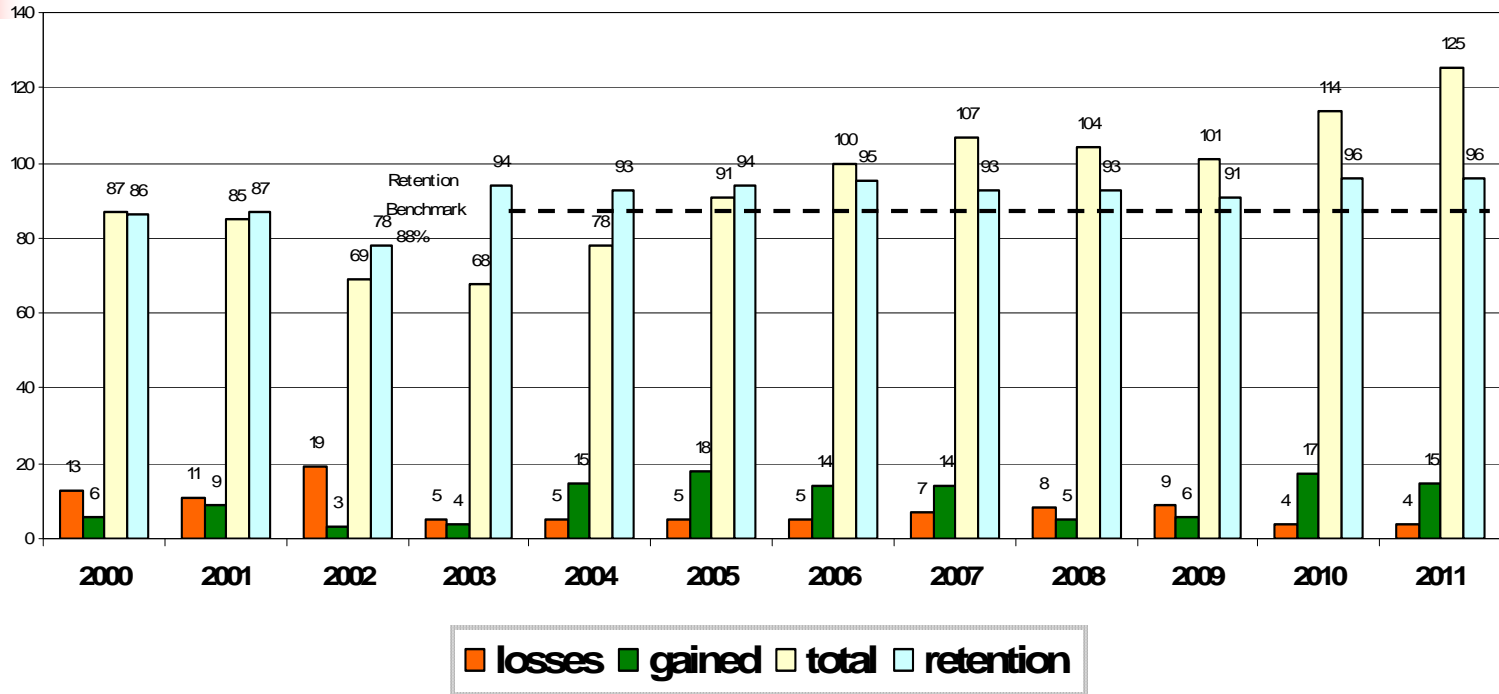


Membership Statistics

- Members (125), Owners (59), Services & Equipment Suppliers (66)
Active: (43), Associate: (66), University: (16)
- Members Gained (15)
 - Alliance Source Testing, LLC
 - Barr Engineering Company
 - CH2M Hill
 - City Utilities of Springfield, MO
 - FLSmith, Inc.
 - HDR Engineering, Inc.
 - ICL-IP Americas, Inc.
 - Imerys
 - Mississippi Lime Company
 - New Page Corporation
 - Nol-Tec Systems, Inc.
 - Nooter-Eriksen Environmental Tech.
 - Power Plant Management Services, LLC
 - Rayonier, Inc.
 - Tri-Mer Corporation
- Members Merged/Acquired, Cancelled
 - Active (1), Associate (3), University (0)
 - Bechtel, Global Corporate Consultancy, Nationwide Boiler, P.H.Glatfelter



CIBO Membership



Recession & 9/11 |
 Membership Stabilized |
 Membership Growth: 57% |
 Recession |
 Growth: 23.8%
 Retention consistently above benchmark

Retention Benchmark Source: Association Management & Marketing Resources (AMMR)



2011 Membership Plan Update

1. Worked to Advance the CIBO Position in Energy and Technical Areas

- Promote CIBO's Leadership in: Energy Efficiency, Fuel Diversity, and Emission Reduction Technologies in Charting a Path Forward
- We are a Resource and Experts in What We Do
- Continue CIBO's Leadership in Defining the Boiler MACT & Climate Change Discussions Agenda
- One Stop Resource for current direction in Energy & Environmental Issues and Technology Development
- Work to Develop Bridges with Stakeholders, e.g. APPA, SBA, OTC



2011 Membership Plan Update

2. Continued Communication and Promotional Activities w/Emphasis on the Benefits of CIBO
 - Newsletter: Prospect Generator, Associate Profiles
 - Website: Associate Profiles Organized by Products/Services Provided
 - Brochure Updated

3. Continued Focus on Member Retention Utilizing Retention Process
 - Continued to Utilize Retention Process
 - Retention Rate: 96.5%
 - Owners: 98.2%, Associates: 94.8%
 - Retention Consistently Above Benchmark of 88% Past Nine Years



2011 Membership Plan Update

4. Continued Drive for New Members
 - Signed 15 New Members, Most from Target List
 - Sought out Defections from Trade and Industry Groups
 - Small Business Classification Pursuit
 - Continued to Utilize Recruiting Process

5. Executing Small Business Marketing Plan
 - Targeted Promotion & Recruiting



2011 Membership Plan Update

6. Continued Focus Group Meetings

- Developed Focus Group Meetings w/CEO Committee Based on Member Input
- Held Three Successful Focus Group Meetings Associated with Quarterly Committee Meetings

7. Continued to Solicit Input from Membership

- Validated CIBO Direction and Actions as we move forward
- Followed up on Prospect Leads from Members
- Heightened Member Participation in Conferences & Meetings Planning



2012 Membership Plan

We are approaching 130 Plus Members

The Ongoing Challenge:

Continue to meet and exceed the expectations (needs) of a growing and diverse membership base as the political and regulatory landscape continues to evolve



Market Environment/Trends/Drivers Energy & Environmental

- Economic Pressures
 - Sluggish Economy
 - Certain Sectors Still in a Slowdown
 - Many Companies in Retrenchment Mode
 - Lack of Confirmed Capital Projects Continue Stress on Associate Membership Commitments
 - Continued Cost & Headcount Reductions Emphasize Lost Knowledge Replacement



Market Environment/Trends/Drivers Energy & Environmental

- Increasing & Changing Environmental Regulations
 - BMACT Uncertainty
 - Area MACT
 - Continued Regulatory Pressure on Use of Any Solid Fuel
 - Cross State Air Pollution Rule (CSAPR)
 - OTC (CSAPR+)
 - Criteria Air Pollutants
 - H₂O: Cooling H₂O Intake Structure, NPDS Discharge
 - ASH
 - Utility MACT
 - Climate Change/Global Warming Legislation



Market Environment/Trends/Drivers

- Contractual, Cost and Technical Challenge in Meeting the New Rules
- Fuel Switching (Coal to NG) as Pressured by the Regulators' Continued Negative Position on Coal
- CHP Opportunities as a Result of Utility Coal-Fired Plants Being Retired in Near Future
- Summary
 - Marketplace is in a High State of Flux and Uncertainty



Market Environment/Trends/Drivers Energy & Environmental

- Potential CIBO Membership Growth Areas
 - Actives & Universities newly impacted by Boiler MACT recast
 - Small Business Membership Classification
 - Defections from Trade and Industry Groups



2012 Membership Plan

Musts for 2012/Our Challenge

1. Work to Advance the CIBO Position in Energy and Technical Areas

- Promote CIBO's Leadership in: Energy Efficiency, Fuel Diversity, and Emission Reduction Technologies in Charting a Path Forward
- Continue CIBO's Leadership in Defining the Boiler MACT & Climate Change Discussions Agenda
- As Boiler MACT reaches final definition and promulgation, provide a resource that defines a decision matrix and path forward for Active and University members
- One Stop Resource for current direction in Energy & Environmental Issues and Technology Development
- Work to Develop Bridges with Stakeholders, e.g. APPA, SBA, OTC



2012 Membership Plan

Musts for 2012/Our Challenge

2. Maintain Communication and Promotional Activities w/Emphasis on the Benefits of CIBO
3. Continued Focus on Member Retention Utilizing Retention Process
4. Drive for New Members
 - 50+ Top Prospects
 - Seek out Defections from Trade and Industry Groups
 - Small Business Classification Pursuit
5. Continue to Execute Small Business Marketing Plan



2012 Membership Plan

Musts for 2012/Our Challenge

6. Continue Focus Group Meetings

- Topics Based on Member Input

7. Continue to Solicit Input from Membership

- Validate CIBO Direction and Actions as we move forward.
- Heighten Member Participation in Conferences & Meetings



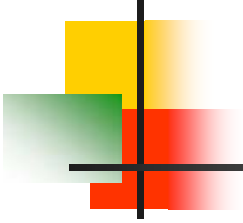
Membership.....

Pursuit is a

Full Time Job!

Membership is

Everyone's Job!



2011 Annual Survey Report

October 12-14, 2011



Agenda

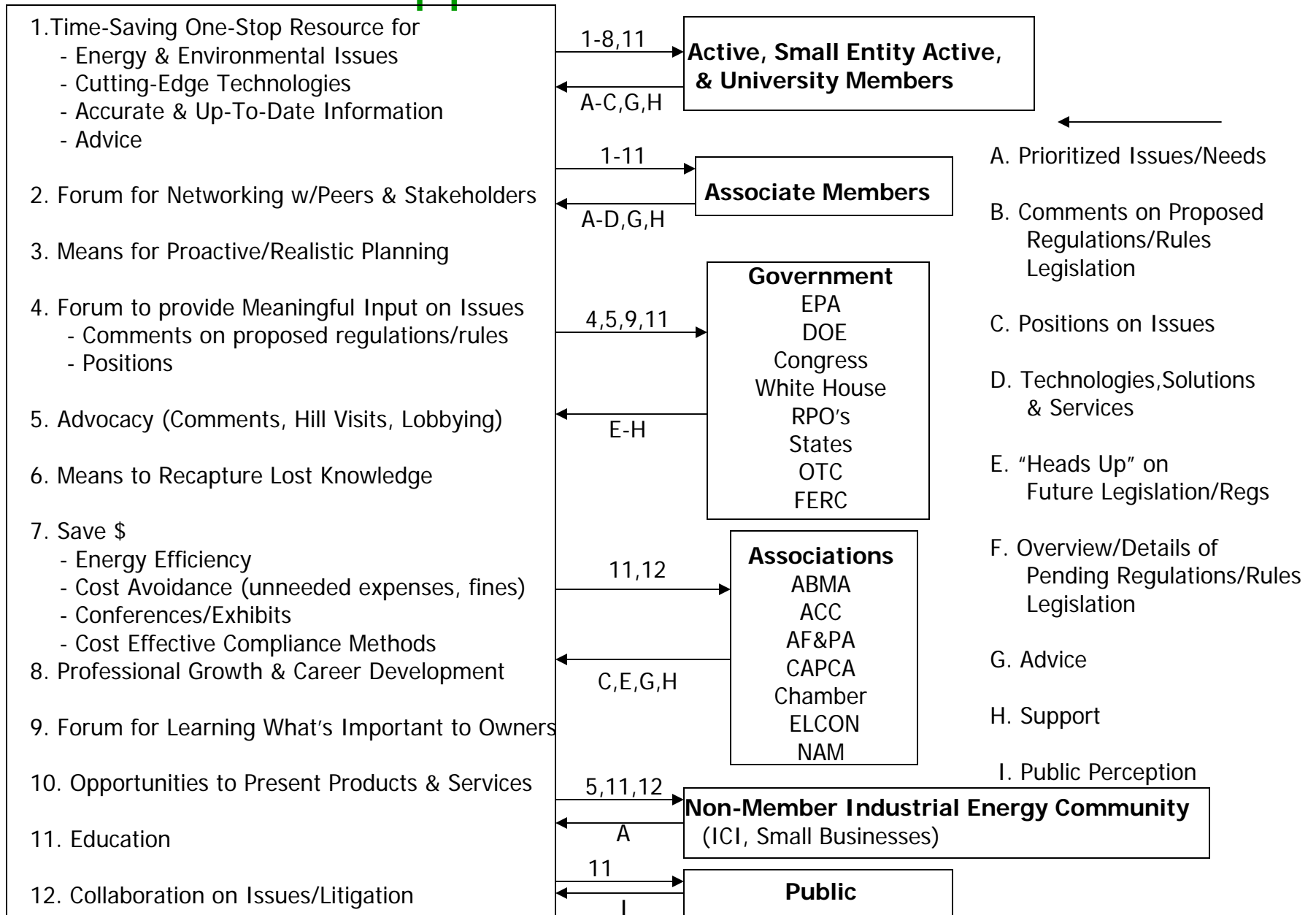
- Response
- Major Benefits of Membership
- Top Member Services
- Top Legislative, Environmental, Energy, and Technical Issues
- Areas That Need Improvement
- Things Would Like To See Added
- Other Things CIBO Could Do



Response

- 47 Respondents (38% of Members)
- Response Breakdown
 - 17 Actives (40%)
 - 23 Associates (35%)
 - 7 Universities (44%)

How Supports It's Stakeholders' Needs





Major Benefits of Membership

- Keeping Up-To-Date on Ever Changing Regulatory, Legislative, and Policy Issues; Environmental Regulations Watchdog
 - Access To:
 - Current Information on Key Environmental, Energy and Technical Issues
 - Technical Information and Expertise (conferences, focus groups/forums, meetings)
- Networking/Interacting w/Counterparts/Customers/Vendors
- Leveraged Advocacy – Both Legislative and Regulatory
- Involvement & Access to Influence Environmental Regulations
- Access to EPA, DOE, Congressional and Administration Staff



Top Member Services

- Networking with Other Members
- Email Notices & Reports Distribution
- Industry Issues Identification & Information
- Internet Site – Members Only
- Issue Information Availability



Top Legislative Issues

- Boiler MACT
- Clean Air Act Review & Amendments
- New Source Review Reform
- Environmental Regulatory Advocacy
- Multi-emissions (3P-4P)



Top Environmental Issues

- Boiler MACT
- NAAQS
- Cross State Air Pollution Rule (CSAPR)
- New Source Review Reform
- Environmental Litigation



Top Energy Issues

- Regulatory Activity Relating to Fuels
- Alternative (Opportunity) Fuels
- National Energy Strategy
- Energy Efficiency
- Carbon Management



Top Technical Issues

- Emission Control Systems
- Energy Efficiency & Optimization
- Boiler Design (Package, Stoker, FBC, etc)
- Ash Handling & Disposal
- Advanced Technologies (Monitoring & Development)



Areas That Need Improvement

- Conferences:
 - FBC: more info on stoker boilers (retrofitting, co-firing alternate fuels) , more representation from stoker boiler owners
 - IECT: more case histories
 - Increased coverage of non-solid fuel emissions technology
 - Provide sessions on bio-fuels
- Energy Committee needs to be more active on position development and advocacy
- Although attendance up, be more aggressive on a committee basis in contacting members about attendance at conferences and meetings
- Water Issues: Intake, Cooling
- Increased contributions by more members to Special Projects/Litigation Fund



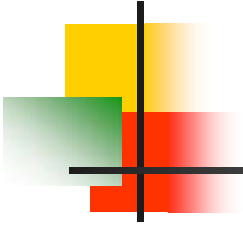
Things Would Like To See Added

- Co-gen Conference, perhaps combined w/FBC
- Presentations:
 - Reciprocating engine based electricity, steam/hot water generation
 - Benchmarking and Environmental Management Systems
 - ORC technologies
- Task groups: Global Climate Change/GHG, GR/Regulatory Special/Litigation
- Any value in having additional surveys that are shorter, but more focused on one particular area (stokers, scrubbers, mercury control)?
- Air emission databases through internet site
- Listing of owner/operators subject to Area Source GACT
- Quarterly update of current issues with situation and progress



Other Survey Comments

- Focus Groups have been helpful
- BoilerBlast newsletter is helpful
- Current activities and forums doing good job keeping us informed on the issues
- Meetings and conferences have been well formatted and presented
- Good survey



Other Things CIBO Can Do?