


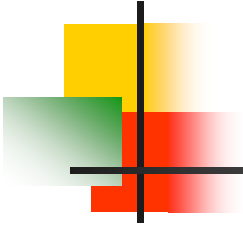


# 2012 Membership Report

## **ANNUAL MEETING SUMMARY**

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- Update of Membership Statistics
  - 2012 Membership Plan Update
  - 2013 Membership Plan

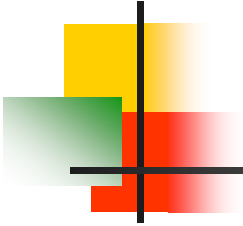
October 10-12, 2012



**Membership Pursuit is a Full Time Job!**

**Membership is Everyone's Job!**

**Membership is a Selling Process!**



**How Do We Maintain  
100 Plus Members?**

**Staying Relevant Through A Constantly  
Changing Political and Regulatory  
Landscape**



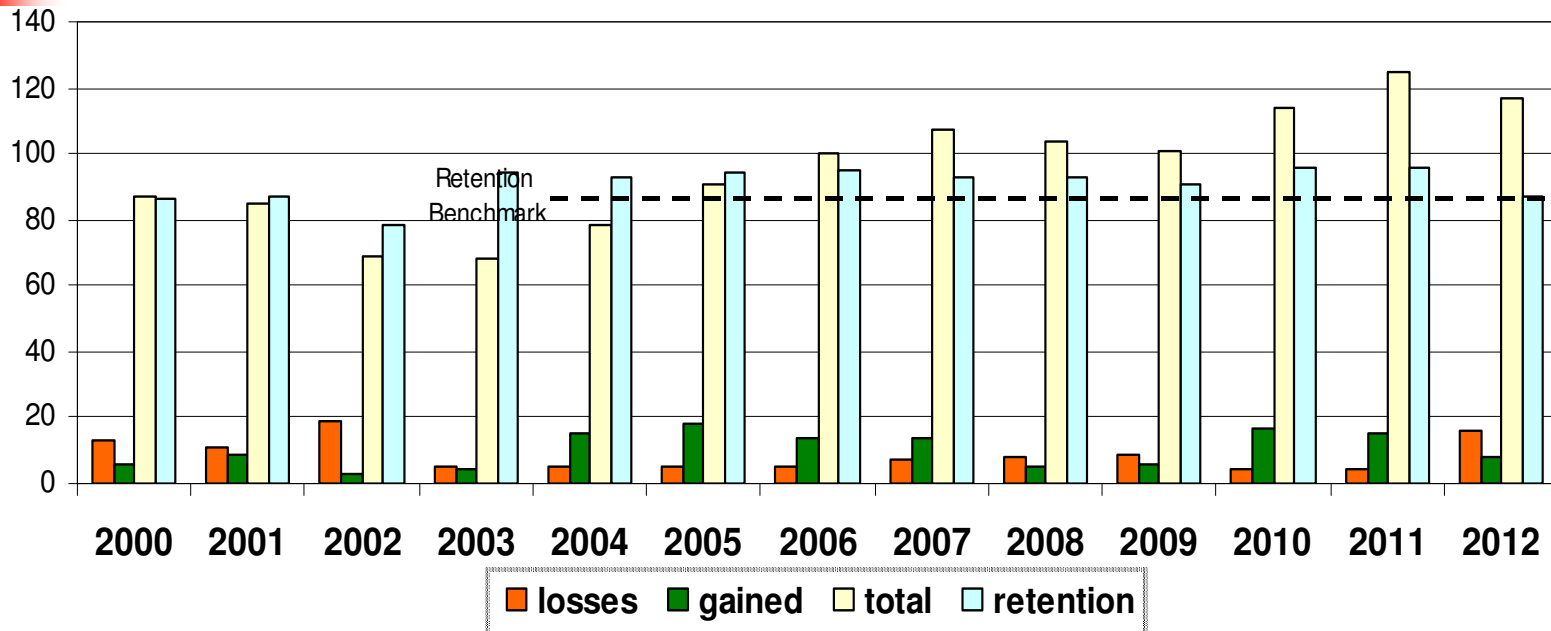
# Membership Statistics

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- Members (117), Owners (61), Services & Equipment Suppliers (56)  
Active: (43), Small Entity Active (2), Associate: (56), University: (16)
- Members Gained (8)
  - **ADA Carbon Solutions**
  - **BabcockPower**
  - **Darling International**
  - **McGough**
  - **National Filter Media**
  - **Novinda**
  - **Recycled Energy Development**
  - **WorleyParsons**
- Members Merged/Acquired, Cancelled
  - Active (0), Small Entity Active (0), Associate (16), University (0)
  - Albemarle, **Alliance Source Testing**, Amerex, Auburn Systems, CECO Environmental, Church & Dwight, **COEN**, GE Environmental, Golder Associates, **Hamworthy Peabody**, Imerys, McBurney, NALCO Mobotec, Nooter/Eriksen, Peerless, Stanley Consultants



## CIBO Membership



Recession & 9/11 | Membership Stabilized | Membership Growth: 57% | Recession | Growth: 15.8%  
Retention consistently above/near benchmark

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



# 2012 Membership Plan Update

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## 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
- Continued CIBO's Leadership in Defining the Boiler MACT & Climate Change Discussions Agenda in Energy & Economic Terms
- 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 Update

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## 2. Continued Communication and Promotional Activities w/Emphasis on the Benefits to Members

- Newsletter: Prospect Generator, Associate Profiles
- Website: Associate Profiles Organized by Products/Services Provided
- Targeted Communications to Potential Members

## 3. Continued Focus on Member Retention Utilizing Retention Process

- Continued to Utilize Retention Process
- Retention Rate: 87.2%
  - Owners: 100%
    - Consistently above Benchmark of 88%
  - Associates: 75.8%
    - Concern of Recent Erosion



# 2012 Membership Plan Update

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## 4. Continued Drive for New Members

- Signed 8 New Members, Most from Target List
- Solicited Active/Small Entity Active Leads from Members
- Sought out Defections from Trade and Industry Groups
- Small Entity Active Classification Pursuit
- Continued to Utilize Recruiting Process

## 5. Continued Execution of Small Entity Active Marketing Plan

- Targeted Promotion & Recruiting





# 2012 Membership Plan Update

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## 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



# 2013 Membership Plan

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## **CIBO Vision**

**CIBO is dedicated to ensuring that non-utility industrial, commercial and institutional energy producers can continue to provide safe, cost effective and reliable energy to sustain a strong and globally competitive economy.**



# 2013 Membership Plan

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## **Association Future Trends and Issues Forecast**

- **Retention Will Continue to Require More Capacity**
- **Advocacy Will Heat Up**
- **Association Value Equation Will Play a Key Role in Retention Efforts**
- **Strategic Planning, the No. 1 Trend Among Associations, is Now Front and Center**
- **Peer Communication and Networking Among Younger Members is Becoming a Major Concern**

**Source: Association Management & Marketing Resources**



## Market Environment/Trends/Drivers Energy & Environmental

- Economic Pressures
  - Weak Economy/Delayed Economic Recovery
  - Many Companies in Retrenchment/Survival Mode
  - Mergers/Acquisitions/Joint Ventures
  - Capital Availability
  - Hesitation to Pursue Projects
  - Lack of Confirmed Capital Projects Continue Stress on Associate Membership Commitments
  - Continued Cost & Headcount Reductions Emphasize Lost Knowledge Replacement
  - Low Cost Natural Gas Availability



## Market Environment/Trends/Drivers Energy & Environmental

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



# 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
  - Recent Executive Order for Increased Application of CHP
- Summary
  - Marketplace is in a High State of Flux/Uncertainty/Confusion/Fear



## Market Environment/Trends/Drivers Energy & Environmental

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- Potential CIBO Membership Growth Areas
  - Actives & Universities to be Impacted by Boiler MACT Recast
  - Small Business Membership Classification
  - Defections from Trade and Industry Groups
  - Associates: Potential Schedule for BMACT Compliance



# 2013 Membership Plan

## Musts for 2013/Our Challenge

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### 1. Broaden CIBO Message

- Switching to Natural Gas is Not a “No Brainer”
- Burning Natural Gas Does Not Solve All of the Environmental Issues
- Energy Efficiency Will Become a Major Issue Going Forward
- Alternate Fuels are Critical to Survival of Many Plants
- Water Use is Becoming the Next Big Environmental Issue
- CO<sub>2</sub> Issue is Not Going Away
- Environmental Groups Are Not Going Away





# 2013 Membership Plan

## Musts for 2013/Our Challenge

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### 2. 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 Practical Compliance Implementation
- One Stop Resource for current direction in Energy & Environmental Issues and Technology Development
- Work to Develop Bridges with Stakeholders, e.g. APPA, SBA, OTC



# 2013 Membership Plan

## Musts for 2013/Our Challenge

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3. Maintain Communication and Promotional Activities w/Emphasis on the Benefits to Members
4. Continued Focus on Member Retention with Specific Associate Member Impacts
5. Drive for New Members
  - 50+ Top Prospects
  - Seek out Defections from Trade and Industry Groups
  - Small Business Classification Pursuit
  - Owner Non-Members Affected by BMACT
6. Continue to Execute Small Business Marketing Plan



# 2013 Membership Plan

## Musts for 2013/Our Challenge

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### 7. Continue Focus Group Meetings

- Topics Based on Member Input

### 8. Continue to Solicit Input from Membership

- Validate CIBO Direction and Actions as we move forward.
- Heighten Member Participation in Conferences & Meetings
- Prospect Referrals From Members
  - Email Prospect's Contact Info to Candy Marriott
  - Direct Prospect to CIBO Website (Becoming a Member/Request Info)



# 2013 Membership Plan

Musts for 2013/Our Challenge

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As Political & Economic Conditions Outside of Our Control Continue to Evolve, It's Important for CIBO to Take a Step Back to Assess Our Strategy Into the Future



Membership.....

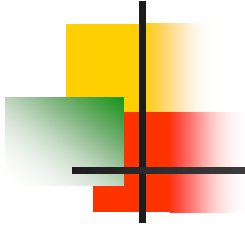
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Pursuit is a

Full Time Job!

Membership is

Everyone's Job!



# 2012 Annual Survey Report

October 10-12, 2012



# Agenda

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



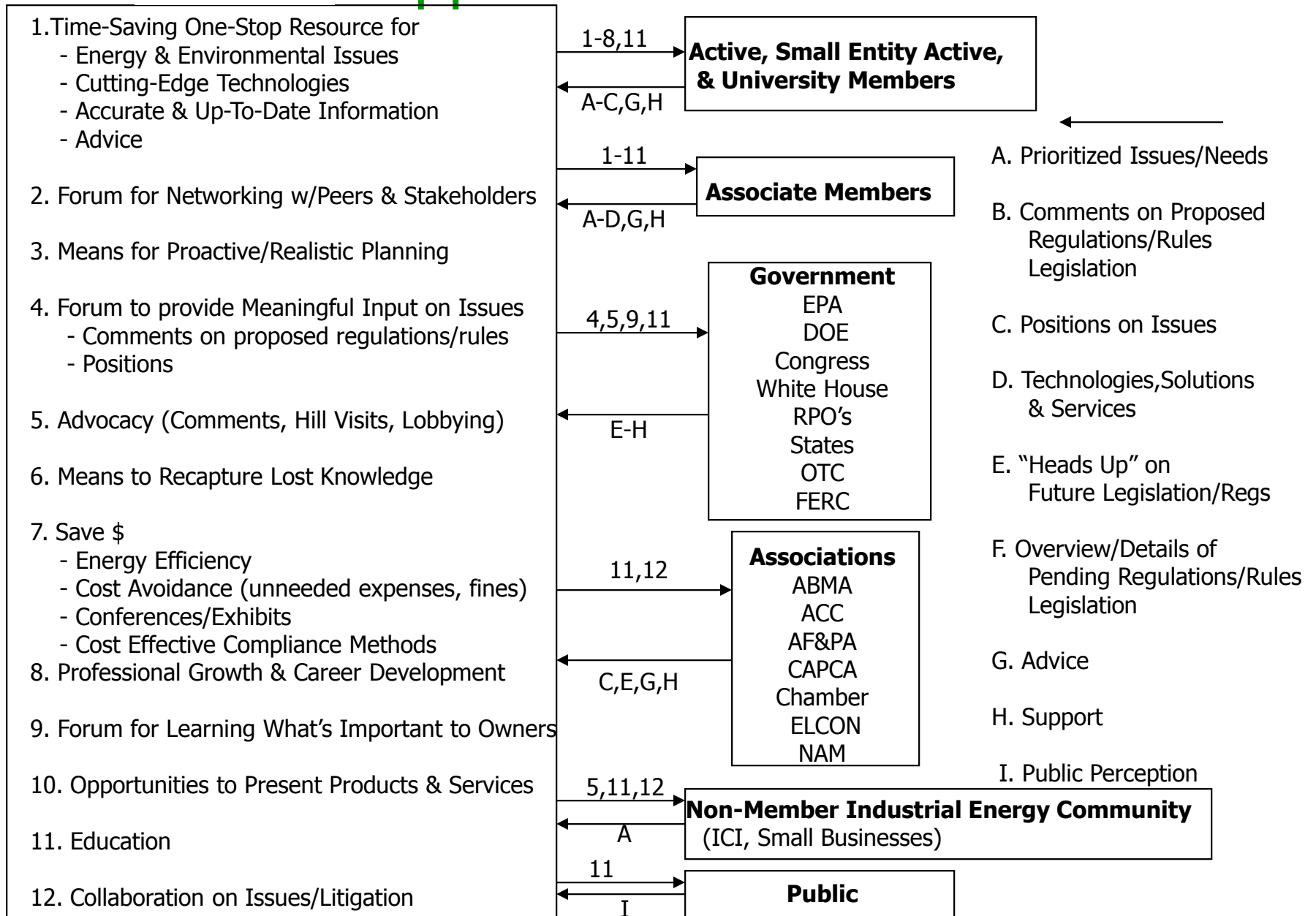
## Response

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- 41 Respondents (35% of Members)
- Response Breakdown
  - 19 Actives (44%)
  - 17 Associates (30%)
  - 5 Universities (31%)



# How Supports It's Stakeholders' Needs





## 2012 Annual Survey Results

Legislative  
Issues

Environmental  
Issues

Energy  
Issues

Technical  
Issues

Member  
Services

Committees &  
Task Groups

Meeting  
s etc.

Marketing & Public  
Relations

<b>Legislative Issues</b>	<b>Total Act (19)</b>	<b>Total Assoc (17)</b>	<b>Total Univ (5)</b>	<b>TOTAL</b>
<b>Boiler MACT</b>	5	4	5	4.66
<b>Clean Air Act Review &amp; Amendments</b>	4	5	5	4.51
<b>New Source Review Reform</b>	4	4	3	3.88
<b>Environmental Regulatory Advocacy (Utility MACT, CATR, etc.)</b>	4	3	4	3.78
<b>Multi-emissions (3P-4P)</b>	2	4	3	3.15
<b>Global Climate Change</b>	3	2	4	2.90
<b>Fuel Supply (OCS)</b>	3	3	3	2.80
<b>EGU, Non-EGU Definition</b>	2	3	4	2.56
<b>Energy &amp; Environmental Taxes</b>	3	2	2	2.41
<b>Clean Coal/Carbon Capture &amp; Sequestration</b>	2	2	3	2.41
<b>Electricity Transmission Access (grid)</b>	2	1	2	1.63



## 2012 Annual Survey Results

Legislative  
Issues

Environmental  
Issues

Energy  
Issues

Technical  
Issues

Member  
Services

Committees &  
Task Groups

Meeting  
s etc.

Marketing & Public  
Relations

<b>Environmental Issues</b>	<b>Total Act (19)</b>	<b>Total Assoc (17)</b>	<b>Total Univ (5)</b>	<b>TOTAL</b>
<b>Boiler MACT</b>	5	5	5	4.90
<b>NAAQS</b>	5	4	5	4.32
<b>Cross States Air Pollution Rule (CAIR, CATR)</b>	4	4	5	3.98
<b>Environmental Litigation</b>	4	3	4	3.68
<b>New Source Review Reform</b>	4	3	3	3.54
<b>RCRA Non-Utility Fossil Fuel Ash Classification</b>	4	3	5	3.44
<b>Ozone Transport SIPs (State SIPs, EGU/nonEGU)</b>	3	3	3	3.00
<b>Title V</b>	3	2	5	2.85
<b>GHG Regulations and Permitting</b>	3	2	5	2.85
<b>Water Issues</b>	4	2	3	2.73
<b>TRI Reporting</b>	2	1	2	1.78
<b>Waste Energy Registration</b>	2	2	2	1.83



## 2012 Annual Survey Results

Legislative  
Issues

Environmental  
Issues

Energy  
Issues

Technical  
Issues

Member  
Services

Committees &  
Task Groups

Meeting  
s etc.

Marketing & Public  
Relations

<b>Energy Issues</b>	<b>Total Act (19)</b>	<b>Total Assoc (17)</b>	<b>Total Univ (5)</b>	<b>TOTAL</b>
<b>Natural Gas Supply</b>	4	3	4	3.73
<b>Regulatory Activity Relating to Fuels</b>	3	4	5	3.54
<b>National Energy Strategy</b>	4	3	5	3.44
<b>Alternative (Opportunity) Fuels</b>	3	3	5	3.34
<b>Energy Efficiency</b>	3	3	4	3.15
<b>Carbon Management</b>	3	2	4	2.90
<b>Utility Regulation</b>	3	2	2	2.51
<b>Energy Project Evaluation</b>	3	2	3	2.32
<b>Electricity Supply</b>	2	2	3	2.22
<b>Operator Training &amp; Certification</b>	2	1	4	1.93
<b>Ownership &amp; Operations Options</b>	2	2	2	1.63

Legislative  
Issues

Environmental  
Issues

Energy  
Issues

Technical  
Issues

Member  
Services

Committees &  
Task Groups

Meeting  
s etc.

Marketing & Public  
Relations

<b>Technical Issues</b>	<b>Total Act (19)</b>	<b>Total Assoc (17)</b>	<b>Total Univ (5)</b>	<b>TOTAL</b>
<b>Emission Control Systems</b>	4	5	5	4.41
<b>Energy Efficiency &amp; Optimization</b>	4	3	4	3.73
<b>Boiler Life Extension &amp; Upgrades</b>	3	3	4	3.34
<b>Advanced Technologies (Monitoring &amp; Development)</b>	3	4	4	3.24
<b>Burners</b>	3	3	3	3.24
<b>Boiler Design (Package, Stoker, FBC, PC, etc.)</b>	3	3	3	3.10
<b>Burner Management System/Safety System</b>	3	3	3	3.00
<b>Ash Handling &amp; Disposal</b>	3	3	4	2.95
<b>Fuels &amp; Fuel Handling</b>	3	3	4	2.90
<b>Performance Benchmarking</b>	3	2	3	2.66
<b>Water Treatment</b>	3	2	4	2.61
<b>Safety</b>	3	2	3	2.61
<b>Controls &amp; Instrumentation</b>	3	2	3	2.46
<b>Maintenance &amp; Inspection</b>	2	2	3	2.37
<b>Codes &amp; Standards</b>	2	2	3	2.37
<b>Turbine Generators</b>	2	2	4	2.32
<b>Operator Training &amp; Controls Interface</b>	3	2	3	2.27
<b>Risk Management</b>	2	2	2	2.17
<b>Electric Generation Systems</b>	2	2	3	2.17
<b>Small Boilers</b>	2	2	2	2.00
<b>Refractorv</b>	1	1	3	1.59

<b>Member Services</b>	<b>Total Act (19)</b>	<b>Total Assoc (17)</b>	<b>Total Univ (5)</b>	<b>TOTAL</b>
<b>Networking with Other Members</b>	8	8	8	7.98
<b>Email Notices &amp; Reports Distribution</b>	7	7	9	7.10
<b>Issue Information Availability</b>	7	6	9	6.90
<b>Industry Issue Identification</b>	7	7	7	6.83
<b>Internet Site - Members Only</b>	6	7	6	6.59
<b>Newsletter (BoilerBlast)</b>	6	7	7	6.46
<b>Online Membership Directory</b>	6	7	7	6.44
<b>Technical Conferences</b>	5	7	8	6.24
<b>Quarterly Committee Meetings</b>	7	6	5	6.20
<b>Response to Request for Information</b>	7	6	5	6.20
<b>Quarterly Committee Mtg. Minutes</b>	6	6	5	5.90
<b>Proceedings and Publications</b>	5	6	7	5.85
<b>Problem/Issue Contact Referral</b>	6	4	7	5.32
<b>Technical Conference Exhibit Booths</b>	4	5	7	4.95
<b>Internet Site - Public Side</b>	5	5	3	4.51
<b>Quarterly Focus Group Meetings</b>	5	4	4	4.27



# Major Benefits of Membership

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- Keeping Up-To-Date on Ever Changing Regulatory, Legislative, and Policy Issues; Environmental Regulations Watchdog
  - Access To:
    - Current Information and Intelligence 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; Forum for Making Regulatory Comments
- Access to EPA, DOE, Congressional and Administration Staff



# Areas That Need Improvement

- Conferences:
  - FBC: Expand scope to include stoker boilers
  - IECT: more case histories
  - Increased coverage of non-solid fuel emissions technology
- 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, Discharge
- Advanced Information prior to Hill Visits to be better prepared and coordinate w/internal lobbying teams: whom meeting with, topics to be covered, talking points





# Things Would Like To See Added

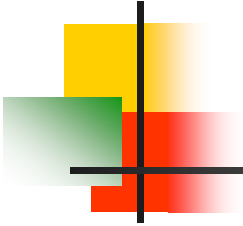
- Workshops/Meetings/Conferences
  - Once finalized, practical BMACT Compliance Implementation, path of least resistance
  - Energy Assessment/Optimization/Efficiency
  - How to Vet & Execute Large Energy/Environmental Projects
- Presentations:
- Task groups: Global Climate Change/GHG, GR/Regulatory Special/Litigation
- Focus on Issues beyond BMACT
- Quarterly update of current issues with situation and progress



## Other Survey Comments

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- 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



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Other Things CIBO Can Do?