




# 2016 Membership Report

## **ANNUAL MEETING SUMMARY**

October 19-21, 2016



# Agenda

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- Update of Membership Statistics
  - 2016 Membership Review
  - 2016 Annual Survey Review
  - 2017 Membership Focus



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

**Membership is Everyone's Job!**

**Membership is a Recruiting Process!**

**Membership is CIBO's Lifeblood**



## CIBO's Vision

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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.



# CIBO's Mission

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- CIBO represents the interests of America's non-utility energy producers and users. It is the organization of choice for accurate information and advocacy to achieve safe and cost-effective solutions for industrial energy, technology and environmental issues.
- CIBO activities are designed to:
  - Provide for the focused exchange of accurate technical information among organizational members, government and the public concerning policies, laws and regulations that impact industrial energy systems
  - Provide a forum for the continued education of organizational members, and the broader industrial energy community on advances in technology and operations to improve the reliability, cost-effectiveness and environmentally safe production and use of energy.



## Our Challenge

Provide Relevant Direction and Answers  
to Energy, Technical and Environmental  
Issues in the Ever-changing Political,  
Regulatory and Economic Landscape

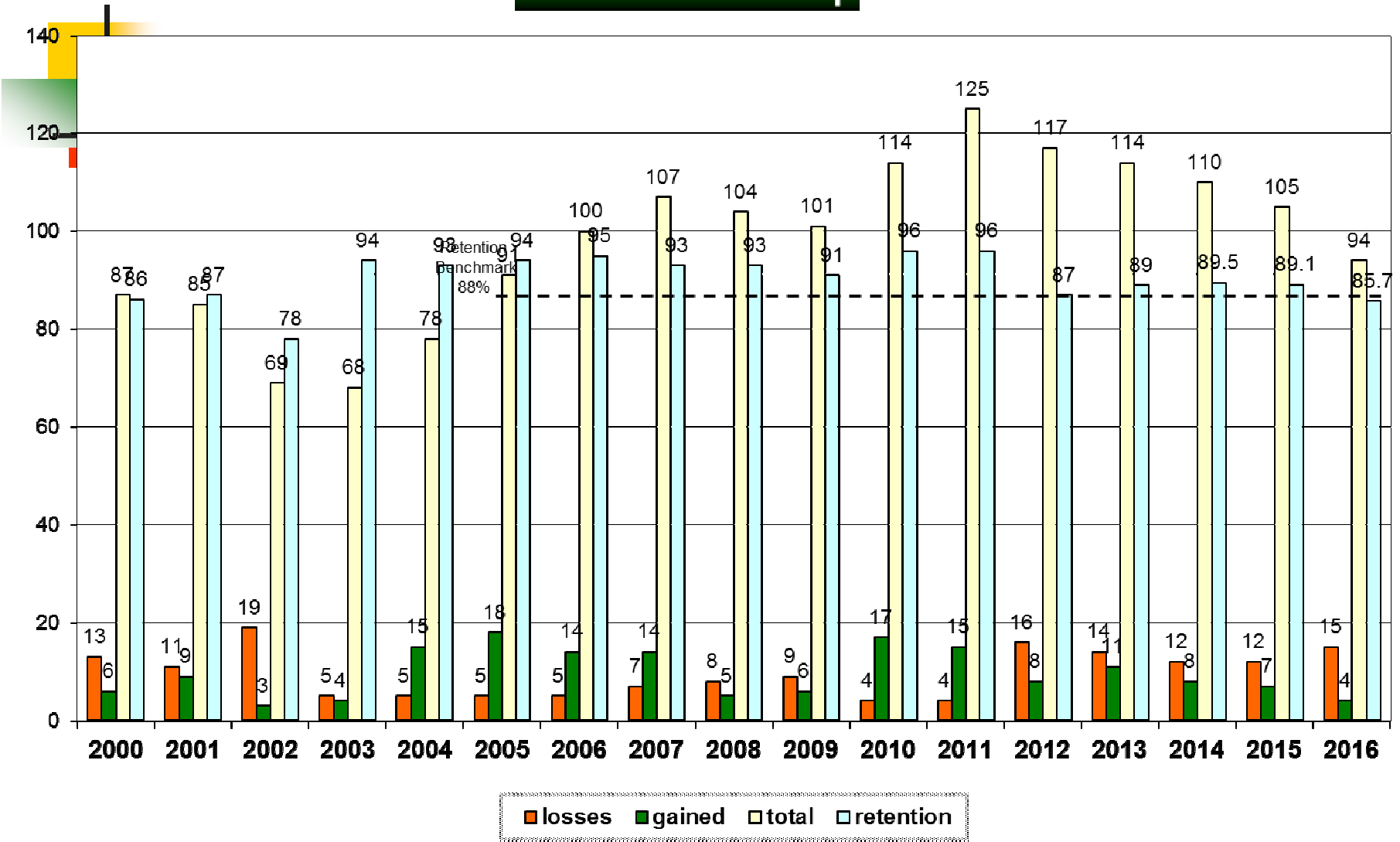


# Membership Statistics

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- Members (94), Owners (48), Services & Equipment Suppliers (46)  
Active: (32), Small Entity Active (1), Associate: (46), University: (15)
- Members Merged/Acquired, Cancelled
  - Active (2), Small Entity Active (1), Associate (12), University (0)
- Members Gained (4)
  - **English Boiler & Tube**
  - **Environmental Consulting & Technology**
  - **Kinetrix Energy**
  - **Preferred Utilities**

# CIBO Membership



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





# 2016 Membership Focus Review

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- BMACT Implementation Experience Networking
- Fuel Switching (Natural Gas) Issues & Challenges
- Alternate Fuels are Critical to Survival of Many Plants
- Water use the Next Big Environmental Issue
- Climate Change rule making is here
- Energy Efficiency is a Major Focus Going Forward
- Combined Heat and Power (CHP)
- Environmental Groups and their State and Local focus



# 2016 Membership Focus Review

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## Steady Voice of Reason in Energy and Technology

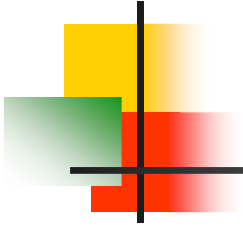
- Promote CIBO's Leadership in: Energy Efficiency, Fuel Diversity, and Rule Making Support in Charting a Path Forward to Meet Ongoing Regulatory and Economic Challenges
- Promote CIBO's Leadership in Defining the Climate Change Discussions Agenda
- Act as a Resource to Provide Member's Experience for Comparative BMACT 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



# 2016 Membership Focus Review

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- Increase Communication and Promotional Activities w/Emphasis on the Benefits to Members
- Continued Focus on Member Retention Utilizing Member Retention Process
  - Retention Rate: 85.7%
  - Owners: 94.1%, Associates: 77.8%
- Greater Focus on Group Meetings
  - Leverage Topics Based on Member Input
    - Held Two Timely and Well Attended Meetings Associated with Quarterly Meetings
  - Increase the Use of Webinars
    - Held Two Timely and Well Attended Webinars with Good Number of Attendees from Inactive members
- Continue to Solicit Input from Membership
  - Validate CIBO Direction and Actions as we move forward
  - Heighten Member Participation in Conferences & Meetings



# 2016 Annual Survey

## Members Feedback

October 19-21, 2016



# Feedback Items

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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



## Response

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- 25 Respondents (27% of Members)
- Response Breakdown
  - 10 Actives (31%)
  - 11 Associates (24%)
  - 4 Universities (27%)



## 2016 Annual Survey Results Legislative Issues

Clean Air Act Review & Amendments	4.83
Environmental Issues Support	4.52
Energy & Environmental Regulatory Oversight	4.33
Regulatory Overreach Reform & Streamlining	3.86
Industrial Energy Policy	3.60
Energy Efficiency	3.58
Clean Water Act Amendments	3.50
Fuel Supply (OCS)/Flexibility	3.50
Energy and Environmental Taxes	3.08
Global Climate Change	3.08





## 2016 Annual Survey Results Environmental Regulatory Issues

NAAQS	4.50	
Boiler MACT	4.16	↑
Environmental Litigation	4.16	
New Source Review Reform	4.08	↑
Title V Permitting	4.08	↑
Ozone Transport SIPs (State SIPs, EGU/non EGU)	3.83	↑
GHG Regulations	3.75	↓
Cross States Air Pollution Rule (CAIR+, CATR)	3.66	↓
Water Issues	3.50	↓
Emissions Monitoring	3.43	↑



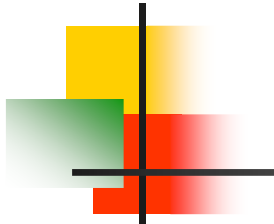


## 2016 Annual Survey Results Energy Regulatory Issues

Combined Heat & Power Cogeneration Opportunities	4.16	↑
Energy Efficiency	4.00	↑
Natural Gas Supply	4.00	↓
National Energy Strategy	3.83	
Fuels	3.58	↑
Clean Power Plan	3.50	↓
Energy Project Evaluation	3.43	↑
Alternative (Opportunity) Fuels	3.08	
Carbon management	3.08	↓
Corporate Sustainability Support	3.00	New



## 2016 Annual Survey Results Technical Interests & Concerns



Emission Control Systems	4.33	
Energy Efficiency (condensing economizers, Ideas)	4.21	↑
Emissions Monitoring and Reporting	3.95	↑
Combined Heat & Power	3.91	↓
CEMS (state-of-the art, upgrades)	3.81	New
Safety	3.75	
Boiler Operations and Performance Optimization	3.58	↓
Alternative Fuels	3.50	↑
Burners	3.41	
Steam/Electric Balance, Thermal Energy vs Electric	3.40	New



# 2016 Annual Survey Results

## How Technical Interests Impact Policy

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### ■ Energy Policy

- Energy Efficiency, Combined Heat and Power, Controls/Instrumentation, Advanced Technologies, Boiler Fundamentals Education, Fuels and Fuels Handling, Water, Risk Management, Small Boilers

### ■ Environmental Policy

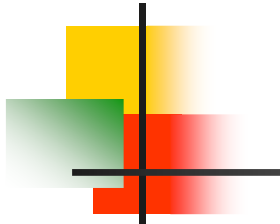
- Emission Control Systems, Emissions Monitoring and Reporting, CEMS, Alternative Fuels, Steam/Electric Balance, Thermal Energy Systems Education, Boiler Design, Controls/Instrumentation, Advanced Technologies, Water, Risk management, Small Boilers, Ash Handling and Disposal

### ■ Operations & Performance

- Safety, Boiler Operations & Performance Optimization, Alternative Fuels, Burners, Steam/Electric Balance, Burner Management System/Safety System, Boiler Design, Controls/Instrumentation, Natural Gas Combined Cycle, Turbine Generators, Advanced Technologies, Boiler Fundamentals Education, Fuels & Fuel Handling, Maintenance & Inspection, Performance Benchmarking, Natural Gas Conversions in Solid Fuel Boilers, Water, Operator Training and Controls Interface, Byproduct Reuse, Risk Management, Analytics/Data Mining, Small Boilers, Codes & Standards, Electric Generation Systems, Ash Handling and Disposal, Biomass Boiler Fouling and Slagging, Operator Licensing and Certification, Refractory



## 2016 Annual Survey Results Member Services



Networking with Other Members	8.29	
Industry Issue Identification	7.91	↑
Technical Conferences	7.82	↓
Email Notices and Reports Distribution	7.66	
Conferences and Meetings	7.52	New
Committee Meeting Minutes & Summaries	7.50	New
Issue Information Availability	7.50	↑
Annual Meeting	7.43	↓
Newsletter (BoilerBlast)	7.41	
Responses to Requests for Information	7.27	↓



# Major Benefits of Membership

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- Staying Current on Ever Changing Regulatory, Legislative, and Policy Issues; Environmental Regulations Watchdog
  - Access To:
    - Inner Circle Current Information and Intelligence
    - In-Depth Analysis on Key Environmental, Energy and Technical Issues
    - Technical Information and Expertise (conferences, focus groups/forums, meetings)
- Networking/Interacting w/Peers/Customers/Vendors/Consultants
- Involvement & Access to Influence Environmental Regulations; Forum for Making Regulatory Comments
- Having an Organized, Technically Based Voice Addressing Issues of Concern to Our Industry



# Areas That Need Improvement

- Conferences:
  - More Relevance to New All Natural Gas Combustion Plant
  - Need More Technical Case Histories
- Committees
  - Energy Committee Needs to Focus on Current Issues With Natural Gas as Sole Source of Production
  - Membership Committee Needs to Appeal to Other Non Power Producing Entities That Would Benefit From CIBO Experience
- Alternative Fuel and Ash in Light of Regulations and Future Billions of Dollars Spent on Ash Pond Closures
- Show Relevance in Post BMACT Period by Focusing More on Natural Gas
- Issue Information Availability- Searchable on-line database of policy and guidance
- Hill Visits – Advance Notice on Whom Meeting With, Topics Covered and Talking Points So Can Coordinate with Internal Lobbying Teams



# Things Would Like To See Added

- Broader Focus on Environmental Topics Impacting Turbines, IC Engines, and Other Combustion Equipment Located at Owners Site
- Committees/Task Groups/Forums
  - Climate Change
  - Online Information Sharing Forum
  - Technical Forum for Actives to Discuss Their latest Challenges
  - Beneficial Use of Byproducts
- Natural Gas combustion oriented regulations, controls, efficiency, monitoring, operation
- Benchmarking and Environmental Management Systems
- AE & EPC Lead Discussion Aimed to Help Owners/Operators Understand How to Request Technical Proposals Including Kind of Data Necessary
- More Direct Access to Resources That Can Affect the Laws to Improve Our Ability to See CAA and CWA Modifications That Are Industry Focused



## Market Environment/Trends/Drivers

- Economic

- Slow Economic Growth Worldwide
- Strong Dollar Attributing to Domestic Slowdown
- Many Companies in Retrenchment/Survival Mode
- Mergers/Acquisitions/Joint Ventures/Divestitures
- BMACT Compliance Strategy of Fuel Switching to Natural Gas Continuing Stress on Associate Membership Commitments (especially Back End Controls)
- Shift to Asset Management Business Model
- Capital Availability & Allocation
- Natural Gas Price Volatility





# Market Environment/Trends/Drivers

- Environmental Laws & Regulations
  - Changing (Round 3) BMACT and Associated Rules
  - Criteria Air Pollutants/NAAQS
  - Water
    - Cooling Intake
    - NPDS Discharge
    - Quality Standards
    - Shortages
    - Thermal Discharge
    - WOTUS
  - Coal Ash
  - Utility MATS
  - Climate Change/Global Warming Legislation/111d regulation/Carbon Tax?
  - Clean Power Plan
  - Fossil Fuel Restrictions
  - Increasing Regulations on Fracking
  - Multiplicity of BMACT Solutions with Differing Risks
  - Ambient Air Assessments (Modeling/Monitoring)
  - Citizens Enforcement (ENGO Involvement)



## Market Environment/Trends/Drivers

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- Energy
  - Fuel Switching
  - Gas Infrastructure
  - CHP Opportunities
  - Renewables
  - Electrification
  - Short Term Availability of Gas

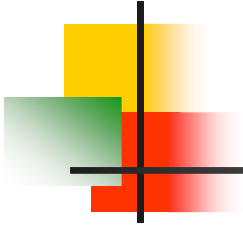


# Market Environment/Trends/Drivers

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- Sustainability

- Workforce Training and Availability
- Continued Cost & Headcount Reductions Emphasize Lost Knowledge Replacement with Pressure to Utilize Outside Sources for Engineering & Maintenance
- Craft Labor Availability Putting Pressure On Projects
- Safety
- Social Consciousness
- Technology Disruption
- Regulatory Understanding and Compliance



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# **MEMBERSHIP PLAN**

October 19-21, 2016



## Our Challenge

Provide Relevant Direction and Answers  
to Energy, Technical and Environmental  
Issues in the Ever-changing Political,  
Regulatory and Economic Landscape



# 2017 Membership Focus

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## Key Focus Issues

- Diversify Membership Outreach
- Fuel Switching (Natural Gas) Issues & Challenges
- Alternate Fuels are Critical to Survival of Many Plants
- Energy Efficiency is a Major Focus Going Forward
- Water use the Next Big Environmental Issue
- Climate Change rule making is here
- Combined Heat and Power (CHP)
- Environmental Groups and their State and Local focus
- Corporate Sustainability Support
- BMACT Implementation Experience Networking



# 2017 Membership Focus

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## To Be Steady Voice of Reason in Energy and Technology

- Promote CIBO's Leadership in: Energy Efficiency, Fuel Diversity, and Rule Making Support in Charting a Path Forward to Meet Ongoing Regulatory, Energy and Technology Challenges
- Promote CIBO's Leadership in Defining the Climate Change Discussions Agenda
- Act as a Resource to Provide Member's Experience for Comparative BMACT Implementation
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- Work to Develop Bridges with Stakeholders, e.g. APPA, SBA, OTC



# 2017 Membership Focus

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## Strengthen Membership Focused Activities

- Increase Communication and Promotional Activities w/Emphasis on the Benefits to Members
- Continued Focus on Member Retention
- Greater Focus on Group Meetings
  - Leverage Topics Based on Member Input
  - Increase the Use of Webinars
- Continue to Solicit Input from Membership
  - Validate CIBO Direction and Actions as we move forward
  - Grow Member Participation in Conferences & Meetings





# 2017 Membership Committee Focus

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## New Member Development

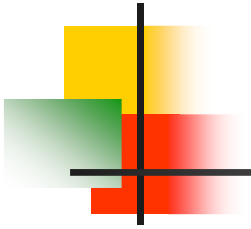
- Our Target is a Gain of 10 New Members
- Expand Owner Prospects Through the Opportunities Created by Selective Vacatures and EPA Remands/ Biomass Hybrid Units
- Diversify Outreach to Alternative Fuels Energy Sector
- Seek Alternate Membership Categories
- Small Business Classification Pursuit
- Encourage Prospect Referrals from Members
  - Email Prospect's Contact Info to:
    - Candy Marriott ([cmarriott@cibo.org](mailto:cmarriott@cibo.org))
    - Bob Corbin ([corbinbob@aol.com](mailto:corbinbob@aol.com))



# Membership.....

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**A strong diverse CIBO  
is sustained by a  
robust & growing  
membership**



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

**Membership is Everyone's Job!**

**Membership is a Recruiting Process!**

**Membership is CIBO's Lifeblood**