

Propane Industry Building Awareness Through Outreach

With new home construction and home renovations still at record highs, the propane industry is expanding efforts to reach home builders and owners with information about propane's exceptional efficiency and value.

At January's 2005 International Builders' Show in Orlando, the propane industry engaged in sponsorships and developed a new booth to ensure the 105,000 show attendees were exposed to the *PROPANE Exceptional Energy*® brand and the Energy Guys advertising campaign. The industry also launched the new Builder Education Kit at the show.

The propane industry also joined with the National Association of Homebuilders to participate in the New American Home, the official showcase house. Much of the home was propane powered, including four fireplaces, a cooktop, a hard-line grill, a back-up propane-powered generator, four outdoor heaters, and two underground storage tanks.

Both on the show floor and outside the model home, the propane industry



addressed image and landscaping misperceptions by showcasing innovative storage applications that deliver good value and have the potential to increase propane's footprint in the home. Many booth visitors were unaware of the benefits of underground tanks – they showed interest in offering gas amenities without the eyesore of a large tank.

The 2005 *PROPANE Exceptional Energy*® Builder Award winners were also announced at the show, recognizing builders who consistently use propane as a home energy source and have found innovative ways to use propane in their projects. The winner for homes

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New Organic Weed Control Option Makes U.S. Debut

Organic farmers raising vine and orchard crops now have a new option in weed control. The Atarus Stinger, a propane-powered thermal weed control machine was presented to farmers at the World Ag Expo in Tulare, Calif., on February 9. Australian company, D.J. Batchen Pty. Ltd., introduced the patented technology to the United States, in part through funding provided by the Propane Education & Research Council (PERC). Using steam-quenched combustion technology, the machine provides weed control without chemicals and can work under conditions where spraying may not be permitted.

"Through the strategies we have outlined in the Propane Agricultural Roadmap, PERC is dedicated to supporting the development of new technology, which has numerous benefits for the agricultural industry and propane marketers," said PERC Agriculture Programs Manager Mark Leitman. "This innovative technology offers organic and conventional producers a clean-burning and environmentally safe option to control weeds."

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2005 Energy Guys Campaign Revs Up at Daytona 500

The propane industry raced into the 2005 Energy Guys campaign, launching the spring advertising during the Daytona 500.

The February 20 advertising launch during the Fox TV broadcast of the Daytona 500 was just the beginning of the spring television campaign, which will also feature advertisements during both NEXTEL Cup and Busch Series races. The campaign will be running on networks such as HGTV, The Weather Channel, Country Music Television and DIY Network through May 15. A second television advertising time period is planned for September 5 through November 20.

Network radio, online text and banner ads, as well as print advertising in home-related special interest publications will round out the media plan aimed at

people in rural areas who are buying, renovating or building a home.

The three successful television ads from the fall campaign – “Cold Turkey” (water heating), “Now You’re Cooking” (cook top) and “Draft Dodger” (whole house heating) – will continue to run throughout the spring. Two new television ads are being developed for the fall.

Three new print advertisements communicating the key benefits of propane are in production. One of the ads highlights the benefits of propane in the laundry room. The

other two new ads focus specifically on planning propane use in a newly constructed home and will debut in home planning magazines in early spring. The new ads will be available in March on the Online Ad Kit.

In addition, three new “Ask Propane” radio spots will be available via the Online Ad Kit in March and will air nationally in April.



Safe Grilling Program Continues in 2005

It's not quite summertime, but it's never too early to start getting consumers ready for safe and satisfying backyard barbecues through the 2005 Safe Grilling program.

According to the Hearth, Patio & Barbecue Association, more than 60 percent of all American homeowners have a gas grill in the backyard, and more than 66 million



people say they grilled in the last year.

The 2005 Safe Grilling campaign builds on last year's effort, which reached nearly 100 million consumers through radio advertising as well as television, magazine and newspaper stories. Using the Energy Guys, the propane industry is again sharing safe grilling tips as well as the benefits of propane through a variety of printed materials, including bill stuffers, hang tags, and tabletop signs that are available for purchase through the online *Propane Industry Resource Catalog*, www.propanecatalog.com.

2005 PROPANE INDUSTRY RESOURCE CATALOG

Looking for the latest safety and training, consumer education, or promotional materials for the propane industry? Get the newly released *2005 Propane Industry Resource Catalog*, which includes detailed descriptions and photographs for nearly 200 industry-related items. A copy of the 2005 catalog is included with this newsletter. To order additional printed copies, contact customer service at (866) 840-1075. And be sure to visit the online *Propane Industry Resource Catalog* at www.propanecatalog.com for the latest product releases.

In addition, the propane industry will again provide print and broadcast news outlets information to produce safe grilling stories, especially around the popular barbecue holidays of Memorial Day and Independence Day. This year, the media outreach will utilize a popular spokesperson, original survey data and the propane industry's own safe grilling tips. In addition, as part of the outreach effort, state programs will each receive individualized press materials and instructions on how they can reach out to their local media. State packages will be delivered by mid-March.

Capital Awareness Program Unveils New Economic Study

The propane industry has 30 billion new reasons for the targets of the Capital Awareness Program to take notice –the \$30 billion the industry contributes to the U.S. economy.

According to an economic study conducted by Energy and Environmental Analysis, Inc., the propane industry is fueling the American economy with a more than \$30 billion contribution to the gross domestic product (GDP). The study also revealed the propane industry is responsible for more than 56,000 jobs throughout its five major sectors – production, transportation, storage, wholesaling, and retail – with 45,000 jobs in the retail sector.

The three states with the highest direct contribution to the GDP from the propane industry include Texas (\$1.5 billion), Louisiana (\$695 million), and California (\$535 million). Texas also tops the list with the most employees of the propane industry, 5,753. Additionally, the study breaks down each state's

propane industry and its contribution to the state economy. To see the entire study, visit www.propanecouncil.org.

Paid for through funding from the Propane Education & Research Council (PERC), this study is important because it quantifies for the first time the economic contribution of this dynamic industry.

“Having this information will help us educate policy makers about the important role propane plays in our nation's energy markets,” said PERC President Roy Willis. “We intend to use this information with federal agencies to help leverage our technology and research investments.”

The economic study is just one of the items that will be discussed during Propane Days, a May 10-11 educational event on Capitol Hill that will showcase propane's industrial and consumer applications for government leaders and decision makers. Propane Days is the highlight of the Capital Awareness Program, a year-long communications

initiative launched in 2004 by PERC and the National Propane Gas Association to make opinion leaders and decision makers in Washington, D.C. more aware of propane.

The Propane Days event will feature two evening receptions as well as meetings with members of

Congress and administration officials and their staff, breakfast briefings for industry members and related events. More than 300 propane industry representatives from across the country are expected to attend the two-day event in Washington.

For more information contact PERC's Brittany Hooten at (202) 452-8975 or brittany.hooten@propanecouncil.org, NPGA's Bob Baylor at (202) 466-7200 or rbaylor@npga.org, or visit www.npga.org.



E-Learning To Expand CETP

PERC is developing a new, computer-based CETP E-Learning program that will enable employers to train their employees in a time frame that best suits their schedules. Building upon the benefits of the recently revised CETP training program, this new training tool will cover Basic Principles and Practices, Propane Delivery Basics, Operating a Bobtail to Deliver Propane, and Operating a Cylinder Vehicle to Deliver Propane. Once available in 2006, this DVD-based program will serve as a companion to traditional classroom instruction.

Funded through a PERC grant, CETP E-Learning will greatly increase the flexibility of the CETP training program by expanding the availability of training outside traditional

classrooms and set schedules. The new e-learning program will allow companies to provide training and continuing education in-house, when needed, when employees are available, and at less cost.

“The new CETP E-learning program will provide the propane industry with freedom and flexibility to train employees,” says Roy Willis, president of the Propane Education & Research Council. “It will provide vital information with the added benefit of interactive graphics, animation, and video that demonstrate the important tasks that employees must do on a daily basis.”

As currently designed, the e-learning training product will include quizzes throughout the courses. Additionally, users will have

the option of taking an end of course comprehensive “pre-certification review” or go straight to NPGA certification. The pre-certification reviews will prepare students for formal certification tests and satisfy marketers that their employees have grasped the e-learning material and have retained it. The official certification process is managed by NPGA. Instructions for certification will be included throughout the e-learning program.

This new e-learning tool represents the propane industry's largest safety and training undertaking to date. For more information, contact Stuart Flatow at (202) 452-8975 or stuart.flatow@propanecouncil.org. Stay tuned for more information as this exciting program is developed!

Awareness Through Outreach *continued from page 1*

under \$250,000 was Ed Nikles of Ed Nikles Custom Builder, Inc., who was nominated by Wendi Nicholson of Eastern Propane Energy Corporation in Hawley, PA. The winner for homes over \$250,000 was Yates Hussey of Yates Hussey Construction, LLC, who was nominated by Harold Van Derveer, Jr., of Van Derveer's LP Gas Service Inc. in Biscoe, NC.

Builder Education Kit Now Available

Get the facts about propane into the hands of builders and remodelers with the new Builder Education Kit. The kit provides facts and technical information to help home-builders make informed energy source decisions. Each kit includes six full-color, eight panel brochures highlighting propane water heaters, home heating systems, propane appliances, outdoor living areas, tank aesthetics, and fireplaces.

A pack of 10 builder kits, item PRC008215, can be ordered for \$32.50. The kit's individual brochures can also be ordered in packs of 25 for \$7.50. Order through the Propane Industry Resource Catalog at www.propanecatalog.com or by calling customer service at (866) 840-1075.



Option Makes U.S. Debut *continued from page 1*

The Atarus Stinger uses patented steam-quenched combustion technology. When the heat is applied to the weed, the temperature of the moisture in the plant cells quickly rises, causing the cell structure to rupture. This prevents nutrients and water from entering the weed's stalks and leaves. Depending on size and soil moisture content, the Stinger has the ability to kill numerous species of weeds.

In addition to being a recognized organic practice, thermal weed control has other advantages over chemical weed control

systems. Thermal weed control with propane cannot be reversed or compromised due to an immediate rainfall, and weeds are not able to develop resistance to the extreme heat generated by propane. Also, growers can reenter the field immediately following treatment, and there is no waiting for harvest.

The new thermal weed control prototype machine was designed specifically for vineyards and orchards. It is trailer mounted and designed for towing by a tractor or four-wheel drive vehicle.

For more information on the Atarus



Stinger, contact D.J. Batchen Pty. Ltd. at 61 413 756 886, visit <http://www.batchen.com.au/>, or contact PERC's Mark Leitman at mark.leitman@propanecouncil.org.

Calendar

March 31-April 1, 2005 – Atlanta, GA
Council Meeting

June 2-3, 2005 – Rancho Mirage, CA
Council Meeting

July 21-22, 2005 – Washington, DC
Council Meeting

October 6-7, 2005 – St. Louis, MO
Council Meeting

December 8-9, 2005 – Houston, TX
Council Meeting

Propane Education & Research Council

1140 Connecticut Avenue, NW, Suite 1075
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1140 Connecticut Avenue, NW, Suite 1075
Washington, DC 20036
Tel 202-452-8975 • Fax 202-452-9054
www.propanecouncil.org

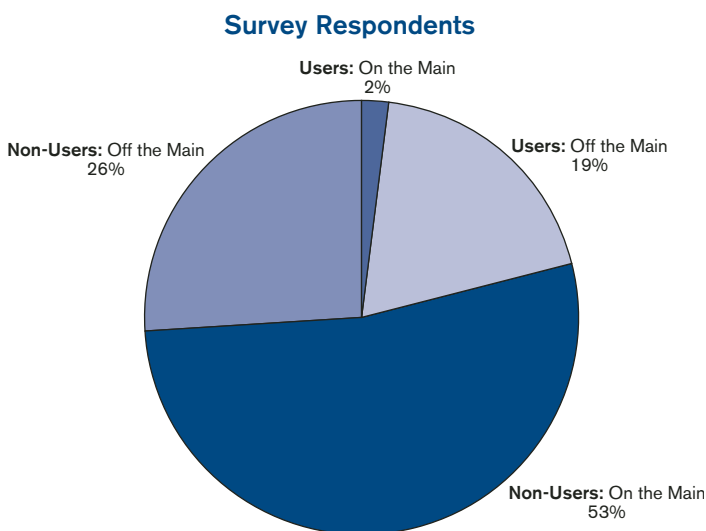
Propane Market Intelligence: Featured Research from the Market Metrics Initiative

The *Market Metrics Initiative (MMI)*, funded by the propane industry through PERC, represents the most comprehensive and consistent analytic effort ever undertaken by the retail propane industry. Key objectives include (1) measuring market-by-market performance, including both the number of propane gallons sold and how those gallons are used; and (2) developing an analytic framework—a model—that can be used to evaluate market trends, specific market opportunities and liabilities, and the impact of PERC programs on consumer behavior.

The purpose of this document and future Propane Market Intelligence reports is to share market research findings and learnings with the propane industry that can guide your company's marketing and business planning efforts.

Preliminary Results

Defining the Market. According to a survey of rural homeowners throughout the United States, about one-fifth (21%) are propane users. But if we consider only homeowners living "off the natural gas main," approximately two-fifths (42%) of rural homeowners are propane users.



A 2004 telephone survey of 943 Homeowners, age 25-54, residing in C and D counties as defined by the U.S. Census.

Specific Findings

The Appliance Opportunity. With almost two-fifths (38%) of propane users currently limiting consumption to only one application – and less than half of those with propane heat also using propane for their hot water and cooking – **the replacement of non-propane appliances offers a substantial market opportunity.** And propane marketers should note that among these current *users*, water heaters are the appliance most likely switched to propane (22%). However, *non-users* living off the main are most likely to enter the propane market by switching their stove or range (26%), furnace (21%), water heaters (12%), or fireplaces (10%).

Propane Marketers Have Built Strong Customer Relationships. Customers are generally highly satisfied with their propane suppliers and research shows there is a direct correlation between supplier rating and favorability toward propane. Not only will the majority of our existing customers recommend their supplier to their neighbors, but the industry has established individual relationships with customers that don't exist with "faceless electricity utilities." This is an important differentiator that we can use to our advantage.

20-Pound Cylinders Provide Product Exposure. More than two-thirds (69%) of non-users use 20-pound tanks for some application, primarily outdoor grilling (64%). In relative terms, the fastest growing element of the cylinder refill market is for mosquito control. The popularity of these tanks represent an important opportunity to build additional customer relationships and create new major appliance customers.

Challenges

Barriers to the Sale. Unfortunately, the research indicates that some people still have serious reservations about switching to propane. If they haven't tried it, they may not be quite ready to like it. Overall, the issues of greatest concern to consumers are cost (41%), dependability (35%), and safety (17%).

Men tend to be more concerned about cost and dependability than are women (45% vs. 35% and 43% vs.

28%, respectively). Dependability-related issues most frequently mentioned include “availability,” “having a tank,” and “refilling a tank.” These same concerns also tend to be more prevalent among higher income homeowners who don’t want a tank in their yard and need to be sold on propane’s advantages.

On the positive side, non-users are much less likely than current propane users (35% vs. 57%) to be concerned about cost, meaning that the perceived cost of fuel is not necessarily a barrier to new propane conversions.

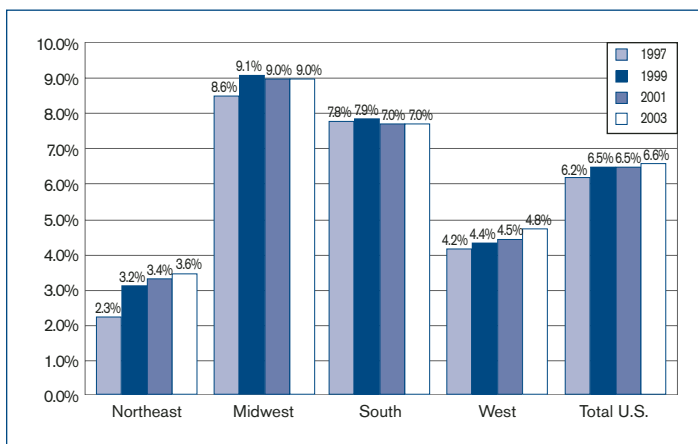
Although propane users rarely cite safety concerns (only 2%), **safety is still an important issue for non-users**, particularly women (20%) and new homeowners (23%). It’s also a more frequent concern in the Northeast, where propane is generally less prevalent, as well as among suburban residents (versus rural), who may not be familiar with propane as an energy source.

Issues and Trends

The following are highlights from the latest *PERC Issues and Trends* report, a summary of secondary research sources that provides the industry with valuable information for effective planning in the complex energy market environment.

Trends in the Residential Market. Data from the U.S. Census’ American Housing Survey indicate that propane’s share of the residential home heating market differs by region. As the graph indicates, growth has been strongest in the Northeast and West, while propane’s market share in the Midwest and South has remained relatively unchanged for the last several years.

Propane Market Share in Primary Home Heating



Customers preferring gas will generally select natural gas over propane if it is available. The natural gas share of residential households increased slightly between 1999 and 2003, from 51.3% to 52.0%. **When natural gas**

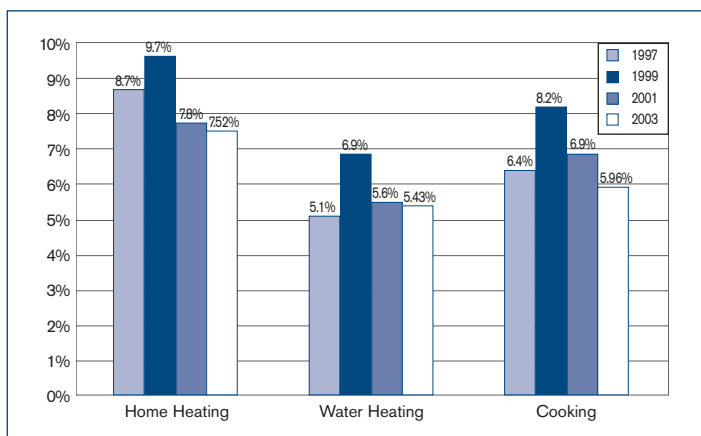
households are excluded, propane’s share of the remaining home heating market increased significantly in all regions except the South.

It should be noted that the market share for propane water heating (3.8%) and cooking (4.8%) are somewhat lower than that for space heating (6.6%). There are, however, significant regional differences in the market shares of these three propane end-uses. Relative to home heating, water heating is strong in the Northeast and especially weak in the South; cooking is exceptionally strong in the Northeast as well, where its market share (7.0%) is almost double that of home heating, but weak in the West (2.5%).

Trends in Manufactured Homes. Propane’s market share in manufactured homes is higher than that for site-built housing, but has slowly declined in recent years.

In addition, the overall market for manufactured housing has declined dramatically in recent years, from a high of over 350,000 units in 1998 to less than 150,000 in 2003. There are signs, however, that the market is starting to recover, including a shift towards larger, more expensive units that resemble site-built homes and are often located on private lots.

Propane Market Share in New Construction



Trends in New Residential Construction. Propane’s share of the new construction market is still larger than its share of existing housing (7.5% vs. 6.6%). But according to the American Housing Survey data, propane has been losing share in new construction market among all major end uses. Much of the decline is due to an increase in the market share of natural gas (from 43.4% to 46% between 1999 and 2003). However, as long as the new construction share remains stable or increases, propane’s total market share should continue to rise.

To see the complete Issues and Trends report, visit www.propanecouncil.org.

PROPANE MARKETER COMPLIANCE

NEW S L E T T E R

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Transportation Security Administration Imposes CDL Hazmat Endorsement Fees

In the January 13 issue of the *Federal Register*, the Transportation Security Administration (TSA) published a new rule establishing fees for security threat assessments that TSA is required to perform on individuals who apply for or renew a hazardous materials endorsement (HME) for a commercial driver license. The rule was effective January 31, 2005.

The amount of the fee depends upon whether the CDL-issuing state collects and transmits driver fingerprints or the state relies on a TSA agent to collect and transmit the fingerprints. TSA established the following fees for HME applicants who submit fingerprints and applicant information to a TSA agent:

- (1) Information Collection and Transmission Fee: \$38
- (2) Threat Assessment Fee: \$34
- (3) FBI Fee: \$22

The total fees for applicants are \$94.

Under the final rule, in states that have opted to collect and transmit fingerprints and applicant information on their own, HME applicants will be required to pay the \$34 Threat Assessment Fee and the FBI Fee of \$22 or \$24, depending on the amount charged by the state. TSA assumes that such applicants also will be required under state user fee authority to pay the state a fee to cover the state's costs of collecting and transmitting fingerprints and applicant information. That fee may vary from state to state.



2004 Federal Regulatory Changes

A snapshot of new or changed Federal regulations published in calendar year 2004 affecting propane operations is provided in the following table.

2004 Federal Regulatory Changes Related to the Propane Industry

To read the referenced documents in the Federal Register, visit http://www.access.gpo.gov/su_docs/fedreg/frcont05.html

Federal Register Date

Federal Register/Vol. 69, No. 3/Tuesday, January 6, 2004/
Rules and Regulations, pp 537-550

Department/Agency

DOT/RSPA/OPS

Regulatory or Compliance Procedure Change

[Most retail propane marketers are not subject to this regulation.] Operators of pipeline systems subject to RSPA's hazardous liquid pipeline safety regulations are required to prepare and file annual reports containing information about those systems. The changes to the regulation specified new data that must be reported.

Effective Date: February 5, 2004

Federal Register Date

Federal Register/Vol. 69, No. 61/Tuesday, March 30, 2004/
Rules and Regulations, pp 16684-16722

Department/Agency

DOT/FMCSA

Regulatory or Compliance Procedure Change

The Federal Motor Carrier Safety Administration amended the Federal Motor Carrier Safety Regulations (FMCSRs) to specify: the minimum driver safety performance history data that new or prospective employers are required to seek for applicants under consideration for employment as a commercial motor vehicle (CMV) driver; where, and from whom, that information must be sought; and that previous employers must provide the minimum driver safety performance history information.

Effective Date: April 29, 2004

Federal Register Date

Federal Register/Vol. 69, No. 61/Tuesday, March 30, 2004/
Rules and Regulations, pp 16722-16738

Department/Agency

DOT/FMCSA

Regulatory or Compliance Procedure Change

The Federal Motor Carrier Safety Administration (FMCSA) established standards for minimum training requirements for the operators of longer combination vehicles (LCVs, defined as, "any combination of a truck tractor and 2 or more trailers or semi-trailers" that has a gross vehicle weight (GVW) greater than 80,000 pounds (36,288 kilograms) and is operated on the Interstate Highway System") and requirements for the instructors who train these operators.

Effective Date: June 1, 2004

Federal Register Date

Federal Register/Vol. 69, No. 69/Friday, April 9, 2004/
Rules and Regulations, pp 18819-18832

Department/Agency

EPA

Regulatory or Compliance Procedure Change

[Most retail propane marketers are not subject to this regulation.] The Environmental Protection Agency (EPA) made changes to the reporting requirements of its chemical accident prevention regulations under section 112(r) of the Clean Air Act. Beginning June 21, 2004, chemical facilities subject to the accident prevention regulations must submit information on any significant chemical accidents and any changes to emergency contact information on a more timely basis than previously required. The rule also immediately removes the regulatory requirement for covered facilities to include in the executive summaries of their risk management plans (RMPs) a brief description of the off-site consequence analysis (OCA) for their facilities. In addition, the final rule also requires that covered facilities include three new pieces of information in their RMPs: the e-mail address for the facility emergency contact; the name, address and telephone number

of the contractor who prepared the RMP; and the purpose of any RMP submission that changes or otherwise affects an earlier RMP submission.

Effective Date: June 21, 2004

Federal Register Date

Federal Register/Vol. 69, No. 99/Friday, May 21, 2004/
Rules and Regulations, pp 29384-29405

Department/Agency

DOT/FMCSA

Regulatory or Compliance Procedure Change

The Federal Motor Carrier Safety Administration (FMCSA) established standards for mandatory training requirements on four specific topics for entry-level operators of commercial motor vehicles (CMVs), who are required to hold or obtain a commercial driver's license (CDL).

Effective Date: July 20, 2004

Federal Register Date

Federal Register/Vol. 69, No. 102/Wednesday, May 26, 2004/
Rules and Regulations, pp 30114-30132

Department/Agency

DOT/RSPA

Regulatory or Compliance Procedure Change

RSPA published a final rule under Docket No. RSPA-99-5013 (HM-229) to update and clarify requirements in the Hazardous Materials Regulations applicable to incident reporting requirements and the Hazardous Materials Incident Report (HMIR) DOT Form F 5800.1. Only the revised DOT Form F 5800.1 (01-2004) specified in this final rule will be accepted for incidents occurring on or after January 1, 2005. Specifically, the final rule:

- Revised the hazardous materials incident report form;
- Provided for electronic filing of incident reports;
- Established one-call reporting of hazardous materials incidents;
- Expanded reporting requirements to persons other than carriers;
- Expanded reporting exceptions;
- Provided criteria for telephonic notification;

- Provided criteria for updates to incident reports;
- Required reporting of undeclared shipments of hazardous materials;
- Required reporting of non-release incidents involving cargo tanks;
- Provided definitions of "Undeclared Hazardous Material" and "Unintentional Release".

Effective Date: January 1, 2005

Federal Register Date

Federal Register/Vol. 69, No. 213/Thursday, November 4, 2004/
Rules and Regulations, pp 64462-64473

Department/Agency

DOT/RSPA

Regulatory or Compliance Procedure Change

Revisions adopted in this final rule include: permitting the use of the Pantone Formula, an industry guide for colors, for hazard warning labels and placards; expanding the use of labels specified in the Compressed Gas Association Pamphlet C-7 on cylinders used to transport Division 2.1, 2.2, or 2.3 gases to all modes of transportation; requiring a NON-ODORIZED marking on certain cylinders, portable tanks, cargo tanks, and tank cars and multi unit tank car tanks containing unodorized liquefied petroleum gas.

Effective Date: October 1, 2005. RSPA authorized voluntary compliance with the amendments adopted in this final rule beginning December 6, 2004.

Federal Register Date

Federal Register/Vol. 69, No. 221/Wednesday, November 17, 2004/
Notices page 67384

Department/Agency

DOT/RSPA

Regulatory or Compliance Procedure Change

In conjunction with implementation of the revised Hazardous Materials Incident Report on January 1, 2005, RSPA made available a programming tool for companies or individuals to use to electronically file hazardous materials incident reports. This new electronic format may only be used for reporting incidents that occur on or after January 1, 2005. The XML

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Federal Regulatory Changes *continued from page 3*

schema format and documentation detailing the layout of the schema and field definitions are available on the RSPA website at: <http://hazmat.dot.gov>. For those companies or individuals who wish to design and utilize their own XML data format, RSPA has developed a

schema validating tool, which is also available on the website. Using this tool, you can assure that your XML format conforms to the DOT's standard for data integrity.

Effective Date: January 1, 2005

Regulatory Reminders

- OSHA form 300A (summary of occupational illnesses and injuries for 2004) must be posted at each company facility beginning February 1, 2005, through April 30, 2005.
- The summary of driver alcohol and controlled substance testing for calendar year 2004 should be completed by the company, its consortium or contractor, and in a secure file for examination by a DOT agent if needed.
- EPCRA Tier II forms ("Community Right-to-Know") for each company facility must be filed with state and local emergency planning committees or agencies, and local emergency response agencies on or before March 1.

Do you have compliance issues or concerns that are of particular interest to you and that would be helpful to others in the propane industry if covered in this newsletter?

Send your feedback to Gordon Frey via fax at 270-753-9807 or by email to g.frey@its-training.com.