

clean & warm



ANNUAL REPORT YEAR 2003

NORA *2004*



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Second Vice Chairman



Jim Pierson
Consumer Education



Robert Boltz
Education & Training



John Huber
President



Bob Greenes
Immediate Past Chairman





The 2003 Annual Report marks the end of another successful year and the beginning of efforts to confront some of our most important challenges. Much of our success is due to the steady leadership of Mr. Robert Greenes, who served as Chairman from NORA's inception in 2001 until earlier this year. During his tenure, NORA has advanced from a platform for ideas to a series of significant accomplishments.

In 2003 NORA expanded and improved its message for the Oilheat consumer education campaign. We modified the description of our product to "99.9 percent clean and 100 percent warm," which better describes today's Oilheat. We also adjusted and redesigned our radio and television materials to better reflect the cleanliness and warmth message. These award winning efforts displayed our message very effectively and projected more dynamically the true values of the industry.

We assisted with the development of a major advance in furnace efficiency in 2003. This development allows Oilheat to have the most efficient furnace available to consumers. It is but one step among several projects that aim to improve furnace and boiler technology, as well as the next generation of burners and controls.

The education and training area continues to be the foundation on which the industry will grow. In 2003 we conducted our first "Train-the-Trainer" and management workshops, both of

which are being repeated in 2004. Our primary Oilheat technical manual is now in the hands of over 6,000 technicians and vocational schools. Additionally, we have produced several training videos including “Fuel Oil Delivery” and “Heating Oil and the Environment” which help improve the safety of Oilheat delivery.

We are concentrating our educational aims on two key areas. The first is a revamped version of the manual for Gold level technical certification. The new manual focuses on Oilheat efficiency, how to compare and evaluate the efficiencies of heating units, and how to improve the operating efficiency of systems already in place. The second area is the production of videos dealing with the electrical components of Oilheat systems.

As we move through 2004, NORA is ready to confront several of Oilheat’s more significant challenges. We want to ensure that Oilheat continues to make progress as a clean fuel. The industry has debated the sulfur level in fuels for several years, yet no clear consensus has emerged. It is evident that the states will likely target the sulfur level in heating oil during the next round of regulatory changes for the environment. While the industry does not desire a mandated sulfur level, the 500 ppm fuel has advantages for the technology that we use and will help us deliver a cleaner fuel. The stringent 15 ppm fuel which is being advocated by air quality and environmental policy-makers has not been tested in our equipment and is not widely available. It also poses a number of obstacles in its transportation and distribution as heating oil, which would make it difficult for the industry to move to that specific fuel. NORA is at work in 2004 to capture the scientific evidence needed to determine the best fuel for the industry.



On an equally vital front, the storage tank has long been considered one of our advantages, but many issues have turned this asset into a potential problem for the industry and consumers. NORA aims to confront and respond to that challenge in 2004 by undertaking the following measures:

- 1) Develop a model installation and maintenance guide for storage tanks, including an inspection protocol.
- 2) Review all state laws and relevant trust funds, and prepare a comprehensive report on everything that can be gleaned from those sources.
- 3) Continue to work with the tank manufacturers for improvements that will address contemporary and future storage needs of the consumer.
- 4) Investigate the potential for installing tanks outdoors as part of a model installation.
- 5) Establish a Tank Task Force to guide and review all efforts.

We trust that when 2004 has concluded we will again be in position to cite the many successful projects that will have accrued to the benefit of a clean, warm, and safe Oilheat product and a prosperous industry.

Don Allen, Chairman

John Huber, President

National Oilheat Research Alliance





research & results

The National Oilheat Research Institute (NORI) is an independent research affiliate, established and supported by NORA for the purpose of advancing knowledge of Oilheat technology and developments. This research is conducted with manufacturers, research laboratories and retailers. NORI also coordinates its research with regional and international organizations. Through the two years of its existence, utilizing funds from the Alliance, NORI has disbursed nearly \$1 million in research grants and has projects underway for another \$1.5 million.

Fuel Quality Study

This is the most significant study conducted by NORI to date. The research has been conducted at Brookhaven National Laboratory and includes several individual studies. They are comprised of:

- Tests of stability of low sulfur fuel vs. conventional heating oil;
- Stability of fuels in homeowner storage;
- The effect of copper piping on fuel stability;
- Effects of storage on stability;
- The impact of additives on fuel quality; and
- Sources of water that can impact fuel.

The results of the completed research are being assessed so that new approaches for the storage and maintenance of fuel may be integrated with current industry practices. The cumulative industry knowledge will be incorporated within a manual being prepared for the industry. This will serve as a primary reference tool for the industry to ensure that the fuel we market is of the highest quality.

Further information on the fuel quality study is contained within this annual report.

OWI

NORI has allocated funds to encourage an active dialogue among our own researchers and those in Europe and Asia on oil heating equipment and fuels. NORI has sponsored travel by scientists at the Brookhaven National Laboratory to attend technical conferences in Germany. This may be the most cost effective use of resources as it allows the Oilheat

industry to acquire valuable information and scientific resources at relatively little expense.

Consumer Energy Council of America

NORI and the Oilheat industry have worked closely with the Consumer Energy Council of America (CECA) for several years. CECA has completed work for NORI in a number of areas, including a major outreach effort and meeting on fuel quality and storage issues.

Additionally, CECA has reviewed the scientific literature on low sulfur fuels, conducted surveys of



This glowing view of the flame within the tube of Beckett's new NXLE low NOx burner embodies the clean and warm message conveyed by today's Oilheat product.

dealers and consumers and published a September 2003 white paper report on that subject. Refer to *Heating Oil Comes of Age: What Low Sulfur Heating Oil Means for the Consumer*, available via Pdf file download from CECA at www.cecarnf.org.

For the past 50 years, consumers of home heating oil have had very little to choose from in terms of fuel products; with the advent of low sulfur heating oil, that is about to change. This report demonstrates what the introduction of low sulfur heating oil will mean for consumers.

Improved Diagnostic Tools

The industry's move to a new generation of heating equipment is accompanied by a need to improve the instruments used to set the equipment to maximum efficiency and performance. The conventional "bicycle pump" smoke tester is reliable technology, but awkward to use by today's standards and may provide inconsistent results. NORI has established two grants with Insight and Bacharach to review and improve upon smoke testers.

Insight is seeking to use a laser and electronic system to measure smoke in the flue. The challenge of this approach is ensuring that the smoke reading measures smoke and not water vapor or dust in the system. Bacharach is working on a pump to remove a uniform sample which would then be applied to filter paper, and then be analyzed by an electronic meter.

Furnace Improvements

NORI has worked in three different areas to improve warm air furnace heating technology. The first area is the development of effective and efficient condensing technology.

Currently, the efficiency of an oil heated furnace reaches a maximum efficiency of approximately 86 percent for two reasons. First, a vent temperature of 50°F must be maintained to ensure that condensation does not occur in either the chimney or the heating unit. Second, this also means the energy used to turn the water to steam is lost.

The Adams Manufacturing condensing unit, tested and developed with NORI funds, allows the water to safely condense in the unit. This allows the exhaust gases to escape at less than 100°F — which means they can be vented through PVC. All of the energy which was previously vented is now captured which allows the unit to attain 95 percent efficiency. The introduction of the Adams unit is discussed later in this report.

Two Stage Furnace

Sizing units for homes and maintaining maximum comfort is difficult because each unit must perform for the coldest day as well as a moderate spring or fall day. Traditional Oilheat furnaces have responded to this change through cycling times of the unit.

NORI has provided a grant to Thermo Pride to establish a unit with a two stage burner and a modulating fan. Under this system, the furnace would deliver heat that more closely matches the demands of the home. This will improve efficiency as the unit's operating cycle extends, but at lower energy levels. It can improve comfort as the amount of air being pushed through the duct system is lower and more continuous. This will also reduce the overall sound level while operating the system.

ThermoPride has completed a configuration of such a unit, employing the Riello 40 G5IR burner. Current activity includes evaluation of the sample burner to ensure acceptable results against prior test performance. A final integrated electronic two-stage fan control has been received and has undergone preliminary evaluation.

A prototype furnace is being built including a specified burner, fan control and ECM blower motor configuration for initial agency testing. The approving agency is being contacted to establish certification test protocol for a two stage oil furnace.

Development of 4- and 5-ton Oil-Fired Package Furnace

The Oilheat industry was able to capture many new customers when the outside Oilpak™ was developed. This is a combination outside unit that delivers both oil-fired warm air and electric-powered conditioned air for cooling.

However, the unit's air conditioning capacity is too low for some applications. Thus, NORI has encouraged development of additional systems. With funding from NORI, field data has been evaluated and incorporated into a product design specification including product

footprint configuration. A package unit has undergone internal modifications to improve high-speed airflow performance by 20 percent while decreasing power consumption (watts) by 6.7 percent.

Work is now underway to create more efficient aerodynamic airflow through the unit to meet the increased demands required for higher cooling capacities and operating efficiencies. Activities include working with Heatcraft on a condenser and evaporator coil design to provide for minimal airside resistance while meeting design constraints of the product line.

New Projects

Part of NORI's aim is to establish meaningful projects that will provide consumers with efficient Oilheat products having rewarding performance features. Several new projects are under consideration.

Oil-Fired Fireplace

The Oilheat industry does not presently have an oil-fired fireplace that could be used for retrofit or in a traditional fireplace setting. Due to the cost of chimneys, and the inconvenience of wood, new home builders tend to use gas for fireplaces. NORI plans to support development and testing of an oil-fired fireplace insert for the U.S market. This will provide an additional use of Oilheat that can be competitive with other fuels.

Operating Controls

Improving primary controls and adding new features is very important to the industry. NORI is seeking technology that will enable diagnosis of the burner flame through either the existing cad cell or the

use of ultraviolet sensors. Controls can be enhanced through telephone relay and other devices to alert the company to problems with the burner and/or system. The control should also be able to monitor the amount of time the burner is on, which could assist in timing fuel deliveries.

Low and Ultra-low Sulfur Fuel

Low sulfur fuels (500 ppm) and ultra-low sulfur fuels (15 ppm) are currently under consideration in many regions of the country. NORI intends to evaluate these fuels for their potential impact on equipment, their worldwide availability, and the impact that low- and ultra-low sulfur fuels will have on air quality.

Low NOx Burners

NORI believes the industry must be positioned to have a low NOx burner available for use in American systems. In many European countries, low NOx burners are mandatory. At this point, they are not required in the U.S., but having a clean low NOx burner available would ensure the industry's ability to respond to regulatory challenges. Additionally, the low NOx burners tend to burn at lower temperatures—which may allow the use of heating systems that otherwise might not withstand the high heat generated by traditional burners.

Condensing Boiler

NORI favors development of a condensing boiler that would better enable the industry to respond to any forthcoming efficiency standards. The NORI Board is currently working with ECR International to commence a project that would lead to the development of a condensing boiler.



Low NOx Burners Come To The Forefront:

Designed for new OEM heating systems, the new Beckett NXLE burner provides ultra-clean, low NOx combustion with low particulates. Riello's low NOx residential LN45 burner (right) promises similar performance.





quality & fuel

Among the many projects undertaken by NORA and its affiliate, the National Oilheat Research Institute (NORI), the fuel quality progress initiative may ultimately have the greatest long term impact on the industry.

Thus far the project has studied the materials commonly used in the transport and storage of fuel and has shown how No. 2 fuel reacts to fuel handling and storage procedures. The results of these studies will be helpful in identifying procedures the industry may wish to adopt for the continued safe and environmentally friendly storage of product. The objective is to achieve benign storage while maintaining the integrity of the fuel itself as advances are made in low sulfur refining methods.

An important outcome of these collective efforts will be the publication of a fuel quality manual, scheduled to be released by NORA in August 2004. The manual will provide an overview of heating oil specifications, along with recommended procedures for purchasing, sampling, and testing, and what to do if the fuel is deficient.

Common fuel problems, how to diagnose them, and operability issues will also be addressed. Preventing fuel problems through proper storage, tank design and components, and use of chemistry (i.e., additives) will comprise a vital section to the manual.

A separate section will be provided on how to store and monitor fuel quality. Topics for both indoor and external storage include tank piping, filtration for both bulk storage and customer tanks. A special section will be devoted to inspection and water removal.

The manual will allow fuel marketers to better understand the inherent properties of heating fuel being distributed today and to assess the effectiveness of post-refinery treatments, transportation and storage methods for dealer bulk sites and customers' tanks.

The review of published literature in the field and how other parties (i.e., European heating industry and the US military) address fuel quality will be available in a compendium from Brookhaven National Laboratory (BNL), one of the research parties assigned by NORA.

We offer some highlights from ongoing fuel quality studies and tests conducted thus far.

Subject: Sampling from home tanks; concern with sludge in tank bottoms:

As shown by the sampling tube in the photograph, Infrared Analysis revealed:

- Most of the sludge consists of heavy hydrocarbons (degraded fuel products)
- A water layer is common where sludge exists
- Microbes found in some samples
- Rust, dirt, sediment may also be present



Subject: Clogging of copper fuel lines are a problem.

- Copper has been known to accelerate the fuel degradation process forming particulates.
- Deposits found in studies of copper tubing consisted of oxidized fuel
- Fuel in stainless steel tubing has shown itself to be more stable.
- Fuels exposed to steel pipes generated less sediment

Subject: Gum Formation in Fuel

- Copper ions can speed up reactions in the fuel that cause solid particles and gums to form. Initial results show that the amount of solid particles and gum

produced by fuel when exposed to copper is much higher than base fuel or other tested metals (steel and stainless steel)

- Ultra-low sulfur fuel contains negligible sulfur and nitrogen compounds, tends to produce less solid dark particles but will still form some gum.

Comments regarding sludge and gum formation:

- The solid particles produced are very fine (a few microns) and would not normally clog a filter.
- If water is present, sludge and gum can form large clumps and dramatically increase filter plugging.
- The dark colored deposits settle out of the fuel, forming sludge that can accumulate in slow moving streams; this can contribute to fuel line clogging.
- Lab tests are being performed to assess the benefit of additives in resolving these issues.

The results of the fuel quality initiative studies are due to be reported at the Oilheat Visions Conference, to be held August 23-25, 2004 in Providence, Rhode Island.

Evaluations of the effects of additives, testing for storage, thermal stability, effects of stabilizers in copper systems and a review of potential improvements in tank and piping schemes are among the items open for discussion by the industry.



efficiency & comfort

The advent of the National Oilheat Research Institute has enabled the Alliance to move forward with its aim of improving the Oilheat fuel itself and achieving greater economy, reliability, and overall satisfaction from the equipment sold to consumers.

While progress is still before us in several areas, two of NORI's initial grants to manufacturers of warm air systems have reached fruition. The new furnace designed by Adams Manufacturing establishes a new benchmark for oil-fired efficiency; the two stage burner model created by Thermo Pride should enable Oilheat companies to better compete in the warm air marketplace with a system that is highly responsive to changing modes of comfort within a home.

NORA Grant Supports “World’s Most Efficient” Furnace

The National Oilheat Research Alliance (NORA), through its National Oilheat Research Institute (NORI) affiliate, presented a grant to Adams Manufacturing Co., Cleveland, Ohio, to develop and market an oil-fired condensing furnace with combustion efficiencies (95 percent attained) that surpass most Energy Star-rated natural gas furnaces on the market.

According to NORA President John Huber, “The condensing furnace which was in development by Adams presented an opportunity to ensure that this technology reached American consumers, and also to allow Oilheat to have the most efficient furnace in the market.”

After reviewing Adams’ unit, NORA agreed to provide a technology grant to the company. The prototypes were introduced before a NORI review board in December of 2003 and are now being introduced to the industry and the public.

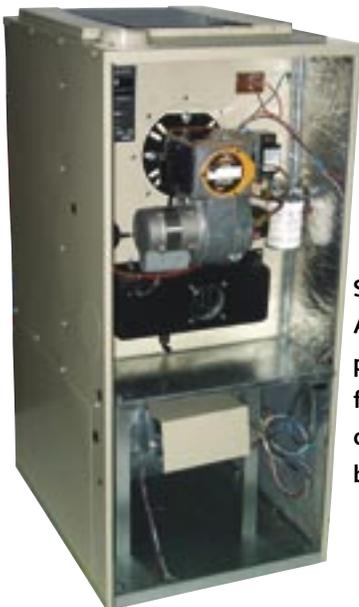
“The World’s Most Efficient Furnace” is available in residential and commercial BTU output ranges (50,000 through 250,000 BTUs).

The ultra high-performance, oil-fired condensing furnace is aided by a very low stack temperature, which allows the use of a PVC composite for exhaust piping.

The modern condensing furnace is well-suited for three distinct markets: retrofits, new construction and light commercial sites.

Adams’ furnace uses a relatively simple design, employing standard controls and a positive venting flue.

The Adams condensing furnace is one of several industry Research and Development projects sponsored by NORA. To find out more about other NORA-supported R&D initiatives, visit www.nora-oilheat.org.



Supported by a NORA grant, Adams Manufacturing Co. has produced an oil-fired condensing furnace featuring ultra-high combustion efficiency assisted by low stack temperature.

Thermo Pride Uses NORA Grant to Advance Oil-Fired Warm Air Technology

Thermo Pride, the North Judson, Indiana manufacturer of furnaces and air conditioners, applied for and received two research grants from the National Oilheat Research Alliance in 2003.

Over the past year, Thermo Pride used the grants from NORA to research the feasibility of a two-stage oil furnace with an ECM motor which has since moved up to the development stage for the warm air marketplace.

Thermo Pride will also incorporate the funds to expand their line of Thermo Paks™ to include four- and five-ton versions of their packaged outdoor oil furnace/air conditioning unit shown at right.



Everett James, Thermo Pride’s director of engineering said, “With the grants provided by NORA we have the opportunity to research and develop a couple of products that we foresee as having benefit to the marketplace with unique technological features and capacities for the oil heating consumer.”

James stated the R&D on these products would not have been possible without the help of NORA. “Products with select market potential, such as these two, would have remained on the drawing board while engineering time would have been invested on more conventional, mainstream developments.”

Providing funds for this type of research is critical to the success of the Oilheat industry. Improving the product for customers can only be accomplished via a strong partnership with manufacturers who understand how to bring efficient products to market.



Thermo Pride’s ECM oil-fired furnace will soon feature a two-stage burner for high- and low-firing sequences to better service home comfort cycles, thanks to development funding from NORA.



education & training

NORA Education and Training followed a broad agenda in 2003. The programs, services and products provided to Oilheat companies and the heating contracting marketplace are growing in reach, magnitude and value.

Over twelve hundred NORA technical exams were taken in 2003, with successful certification achieved by over 80 percent of those applying. As of early 2004, over 7,000 Oilheat technicians across the USA were qualified to be recognized as NORA certified technicians at the respective Bronze apprentice, field-proven Silver, or more experienced Gold levels. NORA has approved 187 continuing education Oilheat courses.

We started the year by introducing the new NORA Silver Technician Certification Program. It includes the training textbook, *The NORA Oilheat Technician's Manual*, an Instructor's Guide in book form and CD, and a new Silver Technician Certification exam.

The NORA Education and Training Committee met in early March 2003 in Baltimore. The meeting was held in conjunction with NORA's "Train the Trainer Workshop" attended by seventy of the industry's top educators who received a day's coaching from veteran HVAC instructor and author Dan Holohan.

Bronze Apprentice

NORA created a new "Bronze" Technician Certification level in 2003 to give apprentices recognition and further incentive to continue their education. To receive Bronze Certification an apprentice must have at least 80 hours of formal classroom training in a NORA approved program and pass the Bronze Exam. After three years experience in the field and another 24 hours of NORA approved Continuing Education Credits (CEUs) they automatically qualify for Silver Certification.

NORA Gold Technician Certification Manual

A new book, *Efficient Oilheat, An Energy Conservation Guide* was drafted in 2003 and will replace an earlier publication as the reference and training manual to use to achieve NORA's Gold level certification.

Efficiency and fuel conservation go hand in hand to achieve customer satisfaction. This manual covers the installation and servicing of components responsible for the safety, reliability, and comfort features of Oilheat. Special attention is given to recognizing when older equipment needs upgrading, as well as marketing and sales advice on describing to customers the fuel savings attainable with newer systems.

The book serves a dual purpose. First, it will instruct technicians beyond basic oil burner installation and servicing. Second, it may help a smaller firm's sales efforts where a technician is often the first and most prominent representative to visit a customer's home. It will also prove valuable to salespeople who want to gain a better understanding of the modern aspects of Oilheat.

Additionally, this manual covers environmental and fuel quality topics that have moved to the forefront of regulatory attention, i.e., NO_x and emissions standards and the advent of low sulfur heating oil.

A new Gold level certification exam and a Trainer's Guide will also be made available.

NORA Training Videos

In 2003 we released the "Fuel Oil Delivery" and "Oilheat and the Environment" videos to go along with our popular "Benefits of Oilheat," "How to do a Tune Up," and "How to Respond to a No Heat Call" videos. The latest video will cover older primary controls. We are also working on videos about cad cell primaries and the new microprocessor primary controls. When the current videos are finished, NORA plans to produce a video on warm air limit and operating controls and one on steam and hydronic limit controls. We also plan to do a video on oil tanks and fuel performance.

NORA's Oilheat Management Workshops

In October 2003 NORA presented its first intensive Oilheat Management Workshop over four days in Simsbury, CT, modeled after successful university-level management programs. The faculty is made up of prominent Oilheat educators and consultants who use a real-life case study of an Oilheat company as the centerpiece of their instruction. The program is designed for anyone in a management position in an Oilheat company or those with management aspirations. The workshop covers issues that are vital to running a profitable Oilheat business and features a very low tuition due to a NORA subsidy. Based on the success of the first effort, a second workshop is scheduled to be held in late June 2004 in Annapolis, Maryland.

Advanced Technician Training and Recognition

The NORA Bronze and Silver Technician Certification programs are primarily about oil burners. The Gold program focuses on energy conservation and equipment sales. The industry needs programs aimed at specific heating systems.

Since there are so many different types of systems, it would be difficult to package this kind of training in one certification program. Accordingly, NORA is planning to recognize advanced skills in various specialties.

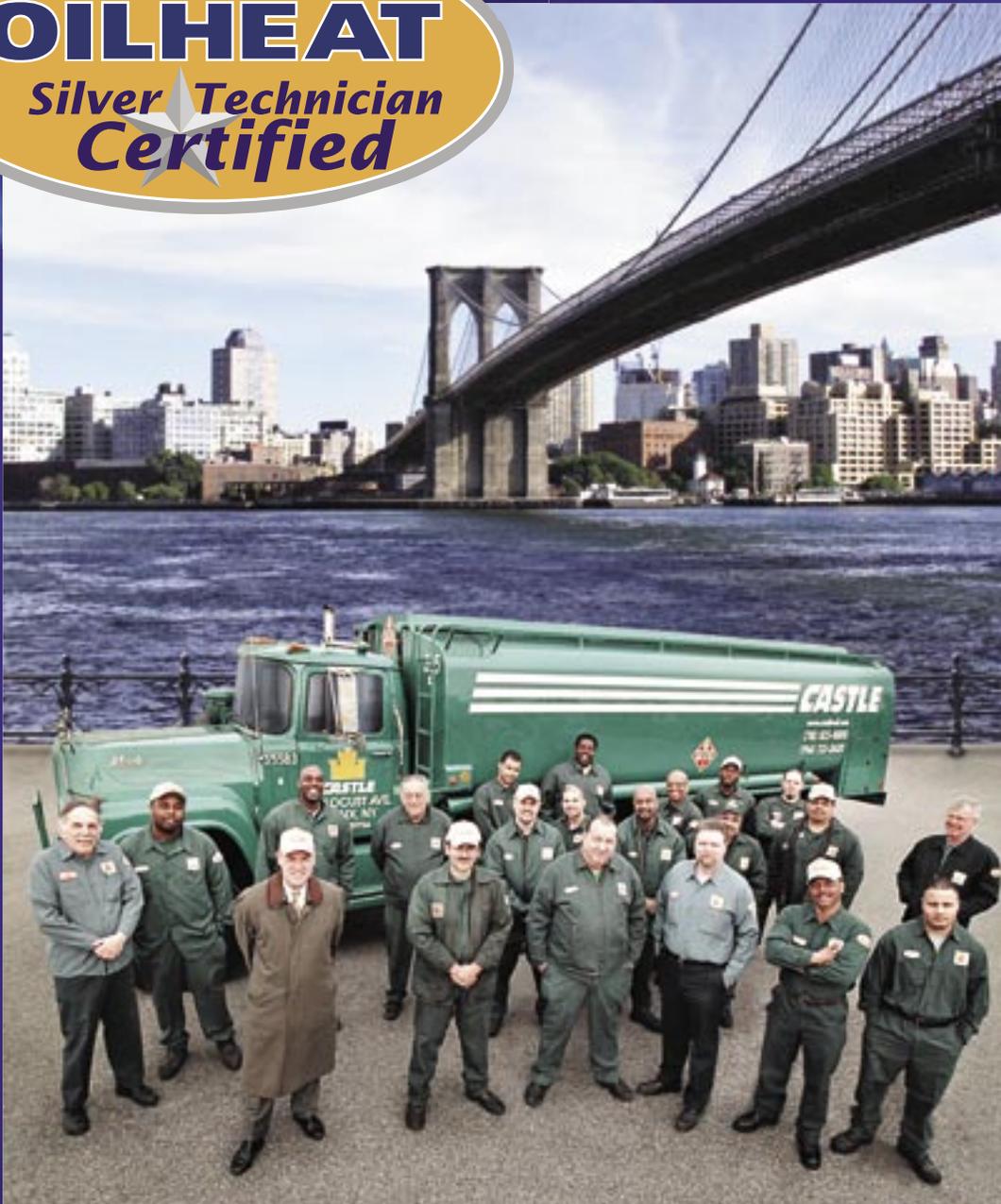
We are looking to partner with other organizations such as the Hydronics Institute and others for hydronic certification; National Comfort Institute for warm air systems and duct design and installation certification. We plan to work with the Technical Standards and Safety Authority (TSSA) and the Canadian Oilheat Association (COHA) about a commercial Oilheat manual that could serve the Oilheat industry. And, we continue to investigate specialty training programs that NORA could participate in for air conditioning and water heating instruction.

NORA eventually plans to make a study of Fuel Quality Performance and Oil Tanks into an advanced certification.

CASTLE “GREEN” ADVOCATES THE SILVER AND GOLD.

Eighteen service technicians and supervisors from Castle Oil Corporation, New York City, presently qualify for NORA Silver and Gold recognition patches. This certification is part of Castle’s emphasis on training and continuing education for all Castle Oil service employees.

OILHEAT
*Silver Technician
Certified*



“Having NORA certification is a great accomplishment. It brings our service personnel to the level of high standards that our customers deserve.” — Robert Dolan, Quality Manager, Castle Oil Operations, New York City

NORA Technical Certification

We have over 7,100 technicians involved in the certification program with over one thousand technicians having qualified for entry in 2003. The program is gaining momentum nationwide.

Technicians can look up their certification status on NORA's education website www.noraed.org.

Course offerings from manufacturers, schools, and other Oilheat training programs that award NORA continuing education credits have increased from fifteen at the start of NORA's certification program to over two hundred at the end of 2003.

A profile of courses and related information can be accessed at the education website. A number of Internet courses as well as NORA-issued videos now make home study a viable alternative. Over 80 proctors are now eligible to supervise the certification exams.



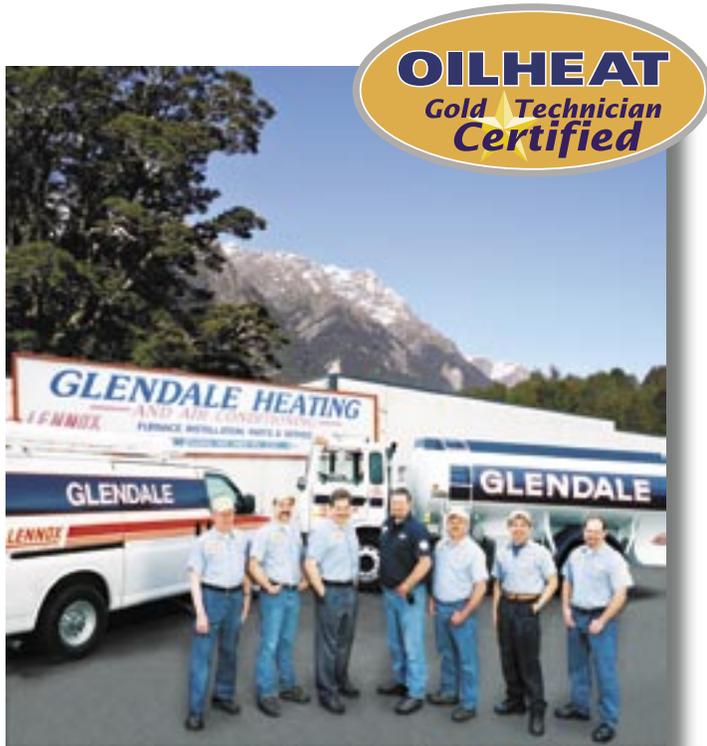
Oilheat Gains Prominence in the Classroom

There isn't an area of the country where there are enough technicians to support the heating and cooling needs of consumers. Recognizing the growing need for technicians, the president of the National Association of Oil Heating Service Managers (NAOHSM), Scott Hinkley (Hinkley Fuels, Claremont, New Hampshire) made it his personal goal to get the thirty chapters of NAOHSM involved with technical schools in their respective communities. Thus, NAOHSM's "Adopt a Tech School" program was born in 2001.

Many of the association's chapters have responded to this challenge by working with local schools to advise and help shape curriculum with NORA's *Basic Oilheat Technician's Manual*. Many of their companies have "tested" a future employee through internship programs and assisted with the design of heating labs that include new oil-fired units. Chapters do their part by bringing students to NAOHSM's annual trade show so students can get a firsthand view of our industry.

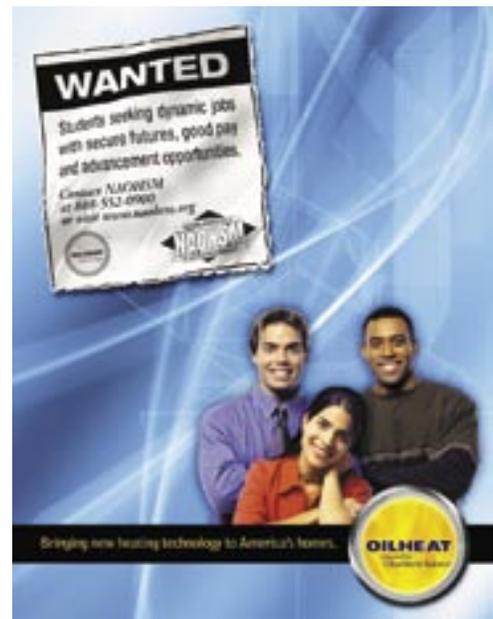
NORA has assisted NAOHSM by funding several marketing efforts to support this program. To effectively tell our industry's story to future technicians, there needs to be a consistent message. NAOHSM recognized the value of support materials to encourage instructors, guidance counselors, students and parents to have a serious look at Oilheat for a promising technical career.

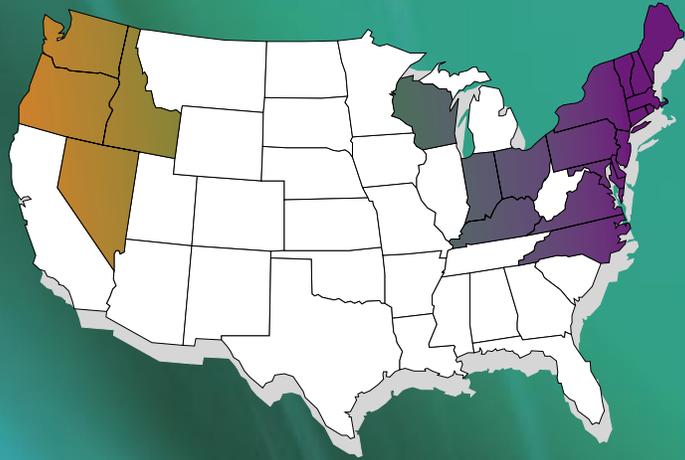
With the aid of NORA funds, NAOHSM developed the CD "An Introduction to Oilheat," banner display stands that are useful when participating in career days, and brochures — including one specifically targeted towards students, parents and guidance counselors.



"We've used NORA certified technicians in our advertising to promote professional service. Our people take pride in our organization and, with a higher level of expertise, our performance and customer satisfaction have improved."

David Fulton, Manager
Glendale Heating and Air Conditioning
Seattle, Washington





states & statements

This section of our annual report provides the opportunity for the state/regional organizations that undertake and oversee NORA's multitude of grass roots activities to issue their individual briefings.

While the activities vary in size and scope in relation to each state's NORA budget, all are substantial in terms of their contribution to Oilheat's consumer education activities, technical training, and advancement of Oilheat's message of warmth and cleanliness.

The following pages present the state summations, and the respective ideas, information, and opportunities that all Oilheat groups and marketers are encouraged to put to use and expand on.

CONNECTICUT

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In addition to participating in NORA's national "clean and warm" campaign, 2003 saw the creation of ICPA's "Operation Market Share." We expanded participation in NORA programs by enlarging our Marketing Committee and holding nine regional Oilheat dealer meetings. We created focus groups among builders, HVAC contractors, plumbers and architects and started an aggressive outreach program using the national "Build With Oil" program as well as other Realtor programs for Oilheat.

Technically speaking, NORA funding helps support the ICPA Technical Education Center (TEC) which follows a state curriculum and has become a primary source for training Oilheat technicians. TEC has received accreditation by Connecticut's Dept. of Higher Education, enabling veterans to attend our school under the GI Bill.

R&D: ICPA demonstrated to the Governor's Task Force on Greenhouse Gas Emissions that new fuels coming to market and the energy efficiency of Oilheat equipment add up to considerable reductions in greenhouse gas emissions.

Thanks to NORA funding, ICPA's Technical Education Center is involved in an extensive recruiting program, including a student awareness program involving all the Vo-Tech Schools in the state. Over 200 students and teachers visited our training facilities during 2003.



IDAHO

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Idaho continued its support of Consumer Education utilizing "Clearburn Science" materials. IPMA also undertook an Oilheat training initiative by arranging for distribution of NORA technical training videos to the industry in the state.

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Indiana ensured Oilheat's presence at major consumer and builder exhibitions, including the Indianapolis Home Show, the Midwest Builders Convention, the Indiana PHCC Convention & Expo, plus the extensive Flower & Patio Show at the state fairgrounds in Indianapolis.

KENTUCKY

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The majority of Kentucky's 2003 NORA funds were used to inform consumers about Oilheat via media in markets across the state and a portion of our efforts was devoted to improving industry contacts.

We developed a "Find A Distributor" section on our website that lists all industry contacts. In keeping with the scope of NORA, all of those involved in the Oilheat industry in Kentucky are included. Being on the southern edge of the Oilheat section of our country, our database continues to grow as more companies involved in Oilheat in Kentucky are identified.

MAINE

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MODA has produced "Smart Energy" consumer information and has published the information throughout weekly media in Maine. The "smart energy" information informs homeowners on ways to conserve, update equipment, and enhance comfort while saving money.

MODA has also initiated the construction of a state-of-the-art education facility that will provide the people of Maine access to education opportunities in order to assist them in getting jobs in the heating field. By providing top-level training, this facility and faculty also enhance the existing technician's ability to help homeowners have properly installed and efficiently running equipment.

We have also provided the regional community colleges with funds to help them update their facilities in order to better educate and train Oilheat students.

MODA has created an outreach program which includes a video and brochures to encourage people to become professional heating technicians and drivers. This followed eight seminars throughout the state that were attended by hundreds of prospective employees. The State of Maine also participated and supported the outreach program.

MODA has provided various stand-alone education courses for Maine Oilheat business owners, technicians, administrative staff, and the public.

MODA has used the NORA-produced radio, print and television media as well as locally produced media to further the advancement of Oilheat.

MID-ATLANTIC REGION

DELAWARE, MARYLAND, WASHINGTON DC

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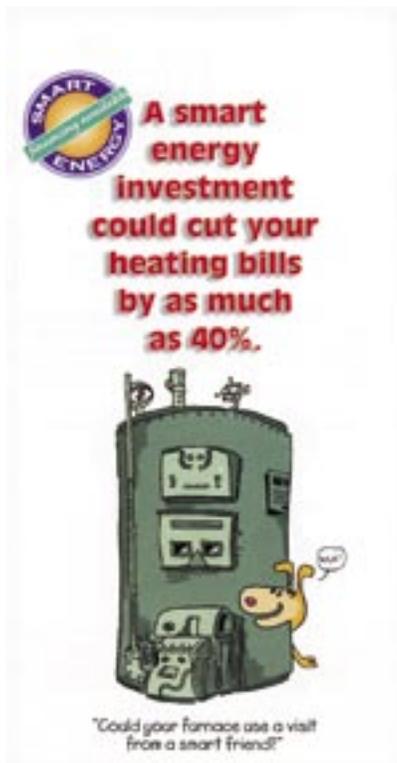
The activities of the Mid-Atlantic NORA group have focused on Consumer Education, Education and Training of industry personnel and the development of a program designed to reach out to VoTech High Schools, Real Estate Agents and Home Inspectors.

The Consumer Education efforts were accomplished by participation in the joint effort of NORA National as we elected to follow the National Program. We provided input to The Martin Agency regarding the media purchases in our markets.

During 2003 we held a number of training programs ranging from basic technician training to, and including, Silver Certifications. In addition we conducted a number of supplier sponsored training courses such as Honeywell's Control Pro and technician training programs offered by the R.E. Michel Company. A total of over 100 technicians were exposed to some form of advanced training. We also conducted eight Pro Oil seminars designed to instruct office personnel, drivers and technicians on the benefits of heating with oil. Over 200 people attended these programs.

We are designing a program to encourage high school students to become interested in our industry. We have made two grants to VoTech High Schools on the Eastern Shore totaling \$20,000 to help the schools upgrade their demonstration equipment and classroom training aids. Through the efforts of the DELMARVA Oilheat Association, member companies have agreed to hire and provide on-the-job training to students that participate in the VoTech Programs. While this program is still in its infancy we believe reaching down to the VoTech level will provide the industry with well-trained technicians in the near future. This effort also includes working closely with VoTech High Schools, identifying their needs, providing assistance where possible and the development of a local apprenticeship program.

We are also developing a program to educate real estate agents and home inspectors to the benefits of Oilheat.



MASSACHUSETTS

Michael Ferrante

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In 2003, the Massachusetts Oilheat Council (MOC) supported NORA's strategic plan to build consumer awareness of Oilheat's attributes by using the television and radio campaign developed by The Martin Agency. The TV campaign ran on major Boston and Springfield stations; radio spots ran in Boston, Springfield, Pittsfield and Cape Cod.

In addition, MOC created and placed another NORA commercial in the Boston and Springfield TV markets. Like The Martin Agency's message, the one minute spot carried the "clean and modern" message, with a warm family feel and utilized the Kenny Loggins' song "Peace of Mind."

With respect to industry training, Massachusetts awarded 25 full scholarships to the New England Fuel Institute's oil burner technician certification class, and awarded over 20 matching grants to Oilheat retailers seeking to provide training for their employees.

MOC initiated work on an industry handbook. The publication will summarize all pertinent industry laws and regulations and provide retailers with a complete employee handbook. Publication is anticipated in 2004.

MOC also completed work on one of the first studies of the combustion characteristics of a blend of low sulfur heating oil and soy-based biofuel. The study was performed at the New England Fuel Institute Technical Training Center on an array of modern Oilheat equipment and provided important data for the industry in its efforts to utilize clean burning fuels and technology. The study received prominent industry and trade media attention.

NEVADA

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Three major activities highlighted the advancement of Oilheat in Nevada. With the help of grants from NORA, the Nevada Council established a website and began a real estate and builder outreach initiative.

The website is already serving consumers, real estate and building professionals and was responsible for creating a bridge with the real estate industry by highlighting Nevada's program dealing with underground storage that has special benefits for heating oil customers. The website allows buyers and sellers to understand how the tank program benefits them. Also as a result of the website, building and real estate trade associations have begun working with the Council to educate and inform their members of the advantages of staying with and building with Oilheat.

Capping 2003 was the airing of NORA-produced radio messages in northern Nevada. Oilheat firms are looking forward to continuing updates on the website to keep it fresh and additional radio commercials in the fall. The Council will also conduct industry education and training as well as participation in a major home show.

The Massachusetts Oilheat Council had this impressive one-piece display measuring 18 ft. wide x 8 ft. tall created for use at the Boston 2004 Home Show and other venues.



NEW HAMPSHIRE

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www.nhoilheat.com

On the consumer education front, the Council ran television messages featuring NH Oilheat spokesperson, Fritz Wetherbee from December 2002 through March 2003. Radio messages ran statewide in conjunction with TV spots during that period.

We distributed 70,000 Oilheat features brochures to dealers statewide; displayed the "Build With Oil" booth at the NH Homebuilders Home Show in Manchester, NH; and participated in the national "99.9% clean, 100% warm" campaign via TV and radio broadcasts.

We also coordinated a program with the state chapter of the National Homebuilders Association to get the message to homebuilders to install Oilheat. Distribution of Oilheat information via our website, brochures, and news releases to the public, consumers, dealers, and potential Oilheat technicians remains an ongoing process.

To boost technical training, the Council conducted five Silver Certification training programs, with 95 graduates, and held one Gold Certification Training Program with 16 graduates. Ten full scholarships were awarded for attendance at the 160-Hour Basic Technician Training Course at various schools.

We assisted Al Little, Instructor, NH Community Technical College, with the High School orientation program so students could become familiar with HVAC programs and established new heating technician programs at respective schools in Laconia, Berlin, and Claremont, New Hampshire.

The Council adopted a proactive business model by conducting Business Management Seminars for dealers, owners, and managers at the New England Center at the University of New Hampshire, and distributed the NORA Model Insurance and Risk Management Policy Manual to all oil dealers in the state. We also sponsored various training seminars for dealers and their employees including a special "high technology" seminar for low technology personnel, concurrent with management training.

Important to our agenda, we arranged for an industry conference in cooperation with the NH Dept. of Environmental Services to review USTs, ASTs, SafeTank, emergency response issues, remediation, reimbursement funding, and the attempt to streamline respective state programs.

NEW JERSEY

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www.fmanj.org

Among the projects undertaken in 2003 was collaboration with NORA and the Empire State Petroleum Association and the Independent Connecticut Petroleum Association on consumer education projects in the northern part of the state. We partnered with NORA and the Pennsylvania Petroleum Association on projects in the southern part of the state.

FMA continues its successful industry technician training program for novices with our "Oil Burner 101" month-long course offered at three locations throughout the state in the summer. We also conduct targeted six week training courses for more advanced technicians one night a week in the spring and fall.

Oil companies again benefited via our statewide distribution of NORA Technical Training Manuals and education videos. We also participated extensively in the "PRO\$" realtor program.

OILHEAT IS 99.9% CLEAN.
THE JOKES YOUR UNCLE
TELLS AT THANKSGIVING,
2% CLEAN.

TODAY'S OILHEAT 99.9% CLEAN 100% WARM



In addition to using broadcast media for a significant portion of consumer information activities, New Jersey supported outdoor displays for use in the tri-state metropolitan markets and use of PRO\$ realtor material.



NEW YORK STATE ASSOCIATIONS

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(ESPA forwards the majority of NORA funding it receives to the localized and regional Oilheat associations in the state. The summary reports for NYC and Long Island follow.)

NEW YORK - LONG ISLAND

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www.ohili.org

As a direct result of new funding from NORA, Oilheat technical training on Long Island, N.Y. took major steps forward in 2003. After months of negotiation, a Memorandum of Understanding was signed between representatives of the non-profit Oilheat Comfort Corp. (OHCC) and Suffolk County Community College (SCCC) to establish the first and only, fully accredited, 2 year degree program in HVAC-R in the State of New York. Upon successful completion of the program, students will be awarded an Associates Degree in the Applied Sciences.

As part of the Agreement, OHCC committed to equip and install a fully operational, state-of-the-art, heating and air-conditioning laboratory, provide \$25,000 annually for operational expenses, and an additional \$25,000 annually for student tuitions, grants-in-aid, and scholarships. The program began in September with 24 full-time students (with an equal number on a waiting list) and the laboratory was completed and dedicated this January in time for the spring semester.

The college facility is now being used two evenings a week by OHCC to run the first ever, NORA-certified, Introduction to Oilheat Comprehensive Service Technician Course. Some 20 students are actively engaged in taking this program which will qualify them as beginning Oilheat technicians with NORA Bronze Certification.

OHCC also plans to utilize the College facility this spring and summer to conduct its technical training and NORA certified continuing education programs which last year were run in various locations throughout Long Island.

NEW YORK - NEW YORK CITY

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In addition to supporting broadcast messages from NORA during 2003, NYOHA finalized an initiative entitled the New York City Oilheat Realtor Partnership Program. This pro-oil initiative included a demographic research program with database, a direct mail campaign targeted to Realtors including an oversized "tickler postcard," pro-Oilheat brochures, homeowner "Welcome Home Brochures," letter templates, and a newsletter for Realtors.

To support education, NYOHA has embraced three local technical high schools in anticipation of enticing HVAC graduates to consider Oilheat as a field of gainful employment. In addition to several \$10,000 grants to each of the adopted high schools to modernize their live-fire laboratories and improve their Oilheat-related training programs, NYOHA made the opportunistic decision to introduce NORA's Bronze Certification to the New York City Public School System.

Working in concert with Michael Markarian at the NORA Education Center (NEC), NYOHA and NEC paved the way for the nation's first technical high school to be approved to conduct Bronze Certification training for NORA.

The Saunders Trades and Technical High School located in Yonkers, NY, is the first high school in the nation to qualify for NORA Bronze status for graduating seniors. Not far behind Saunders' approval, which occurred in November of 2003, came the approval of the William E. Grady Technical High School located in Brooklyn, NY in February of this year. Next on the list for approval is NYOHA's third adopted school, the William E. Smith Career and Technical High School located in the Bronx.

NYOHA distributed to all known NYC heating oil companies:

- A copy of the Oilheat Technician's Manual
- No Heat Call Video
- Tune-Up Video
- Fuel Oil Delivery Video
- Heating Oil & Our Environment Video
- Consumer-friendly newsletter entitled "Hot Ideas!"

TALK ABOUT WIDE SCREEN TV!

The New York Oil Heating Association (NYOHA) is educating the commuting public about the positive attributes of Oilheat with the use of full-motion graphic video billboards that display NORA's "99.9% clean, 100% warm" information spot. Outdoor Digital Video Billboards (DVB) represent the newest rage in outdoor education, gaining the attention of consumers by delivering images and messages that are cost-effective, impressionable and recallable.

The use of DVBs are innovative and offer an enhanced solution to "outdoor clutter." NYOHA's sites include Times Square, New York on West 42nd Street which targets out-of-Manhattan visitors, and the dual-screened Macy's Vision Board, strategically positioned on the facade of Macy's at the busy corner of West 34th Street and 7th Avenue — second only to Times Square as one of the busiest intersections in New York.



OILHEAT LAB DEDICATED AT GRADY HIGH SCHOOL, BROOKLYN, NY

The New York Oil Heating Association (NYOHA) joined faculty and students from the William E. Grady Career and Technical Education High School, elected officials and education leaders, to dedicate the "New York Oil Heating Education Lab" at the urban vocational school.

NYOHA and the National Oilheat Research Alliance (NORA) donated new heating equipment to the school and helped to secure additional equipment from manufacturers. With this donation, NYOHA has also pledged a long-term commitment to the students of Grady High School and is currently working closely with Grady administrators to create ways that students can benefit from the Oilheat industry both before and after graduation. The National Association of Oil Heating Service Managers (NAOHSM), another voice in the industry, has opened its chapter meetings to Grady faculty members so they can learn about trends in the industry and pass them on to students in the classroom.



NORTH CAROLINA

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North Carolina undertook a variety of activities in 2003, including donation of 39 Thermo Pride Oil Paks to community colleges in the state and sponsorship of one-day Oilheat training classes during the year.

An ambitious home, builder, and trade show exhibit schedule was organized with appearances ranging from the Southern Farm Show in Raleigh, to the HVAC & Plumbing Expo in Charlotte, and the North Carolina Home Builders Association Show among others.

Consumer education utilized both network and cable television messages appearing in markets rated by the strength of oil heated homes, supplemented by radio coverage. Print advertising appeared in the publication of the North Carolina Association of Realtors with an Oilheat link on their website.

A color brochure that provides Realtors, Home Inspectors, Home Builders, homeowners, consumers and others with detailed information on non-commercial underground heating oil storage tanks was also prepared.

The Association continues to make investments at its training center, with the acquisition of combustion analyzers, test equipment and new burners.



Outdoor messaging was also a component of North Carolina's program this past year.

"Hot Stuff" inserts created for Ohio Petroleum Marketers were a big part of that state's aggressive Oilheat support and communications program in 2003.

OHIO

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NORA's third year of operation witnessed major progress in areas that affect Oilheat's future in Ohio. OPMCA used one of the leading Oilheat communications firms to manage an integrated program that focused on existing Oilheat homes, property transfers, and our employees. Our first year results were extremely encouraging.

For the first time, more than 120,000 Oilheat customers in Ohio are consistently hearing the good news about our fuel through "Hot Stuff!" inserts. Companies were also encouraged to use NORA's "Homeowners Guide to Oilheat" in a welcome pack for their new customers. We also put together a program that incorporated brochures and training to promote automatic delivery programs.

We also conducted a series of "Oilheat Story" workshops which earned very positive ratings from drivers, technicians and customer service representatives.

Property transfers are a major source of vulnerability for our industry. Ohio attacked it by building bridges to the Realtor community in hopes that they will say more positive things about our fuel and get positive Oilheat information into the hands of homebuyers.

Under the PRO\$ banner (Partnership for Realty and Oilheat Success) OPMCA members made presentations to 400 Realtors in more than 20 offices. More than 12,000 Realtor and Homeowner guides were distributed to Realtors who requested them via a special hotline and a web site. We also surveyed hundreds of Realtors to

identify key areas we needed to focus on, and used that data to construct messages for the Ohio Association of Realtors Magazine. OPMCA had a booth at the Realtors annual show that proved most encouraging.

OPMCA and the Ohio NORA group used pro-Oilheat broadcast messages as a sponsorship vehicle for the Ohio State Buckeyes football and basketball teams.

We plan to continue these growth activities for 2004 and are looking at expanding into technician training options.



OREGON

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OPMA used its NORA resources for television messages to demonstrate the benefits of Oilheat to consumers in the Portland, Eugene and Medford marketplaces. We initiated an outreach program to Realtors and also conducted an Oilheat seminar at the OPMA 2003 convention.

PENNSYLVANIA

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www.ppmcsa.org

In 2003, PPMCSA devoted its NORA funds to consumer education and industry education and training statewide.

The consumer education grant was used to air NORA radio and television messages extensively throughout the state. The market allocations were based on the number of Oilheat households in each area, but also brought Oilheat's message to homes unfamiliar with our product.

Education and training funds were used to complete the PPMCSA Technician Training Center and support training conducted by the Better Home Heat Council of Lehigh Valley. Equipment donations from manufacturers have filled the new center with burners, furnaces and boilers, giving the students the opportunity to work on virtually any heating equipment they may encounter in customers' homes

A realtor program for the Delaware Valley Fuel Dealers Association, a realtor/builder program for the Oilheat Council of Lancaster County and an employees' seminar held jointly by the Berks-Schuylkill Oilheat Association and the Better Home Heat Council of the Lehigh Valley were also supported by NORA funds.

A new training facility and other education support projects were a focal point of 2003 Pennsylvania activities.

RHODE ISLAND

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The Oil Heat Institute, Inc. of Rhode Island continues to hold Basic Oilheat Technician training at the New England Institute of Technology (NEIT) in Warwick, RI in conjunction with New England Fuel Institute. We also developed a new curriculum with NEIT for an advanced course that meets Rhode Island state licensing requirements. A meeting was scheduled with Oilheat dealers to explain the licensing procedures for our state apprenticeship program

We further utilized our NORA professional education monies by conducting a Combustion Air/Power Venting Seminar and two Honeywell seminars.

The OHI ran NORA television messages on local cable last fall to supplement the national information campaign on network television and radio.

VERMONT

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In 2003, Vermont used NORA funds on a wide range of education and training seminars and NORA technical certification programs for technicians. NORA manuals and videos received extensive distribution throughout the state. This was in addition to use of NORA's "clean and warm" material on statewide media for consumer information.



VIRGINIA

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VPCGA has been in the forefront of providing educational opportunities for Virginia's Oilheat industry which serves more than 400,000 homes in the Commonwealth.

In 2003, VPCGA hosted Gold and Silver technician certification classes. We also conducted a two week/80 hour basic burner technician class as well as a sold-out one week advanced burner class for experienced technicians.

In the fall, we held a series of seminars across the state on customer service and tank issues.

We look to expand upon this progress with the opening of a training facility which has been graciously donated by Quarles Petroleum. This state-of-the-art, centrally located facility will enable us to train up to 25 technicians at a time.

Virginia continues to participate in the national public education campaign, which provides the greatest exposure for promotion of today's Oilheat.



WASHINGTON STATE

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In 2003/04, using NORA messages, we assumed a yearly weather sponsorship with the local Seattle CBS affiliate and have received high consumer recognition over this two year program. We also used a weather sponsorship and Internet component in Spokane, WA, along with weather cable news sponsorship that has a three-state broadcast area.

We are expanding our efforts with a program to educate real estate agents about the many virtues of Oilheat.

WISCONSIN

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We introduced a NORA Wisconsin Newsletter at our 2003 Convention and subsequently mail each quarter to all NORA dealers in Wisconsin.

We have established relationships with several Wisconsin vocational colleges which offer instruction on oil-fired furnaces and supplied new student manuals to the Western Wisconsin Technical College in LaCrosse. In 2003, we held our own series of Oilheat seminars for managers and technicians.

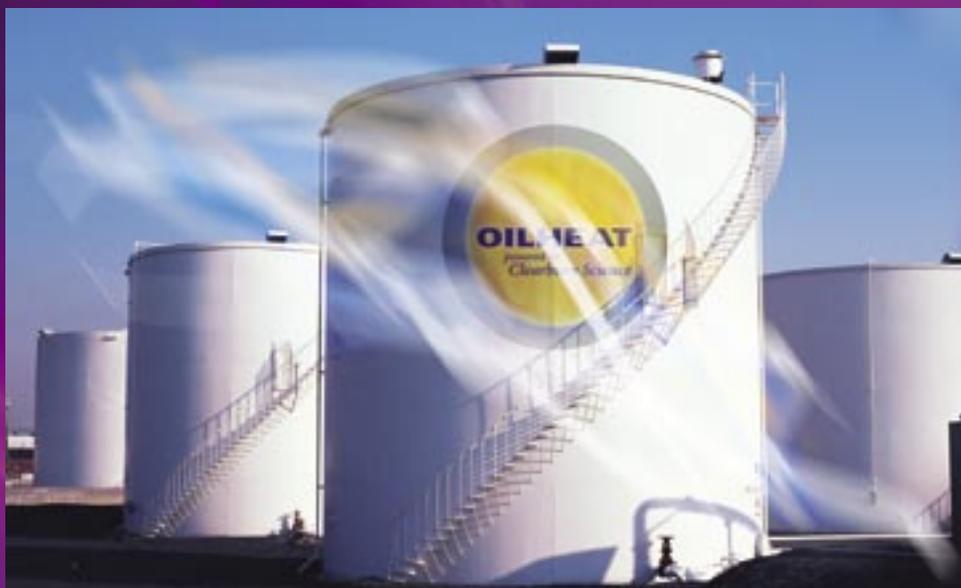
PMAW/WACS exhibits at the Wisconsin Realtor's show. We inform realtors about the benefits of Oilheat and how to list and sell with oil heated properties — our fifth year of what has proven to be a highly successful activity.



A Rutland, Vermont site provided by an equipment wholesaler is the setting for Steve Goodrich, Vermont Fuel Dealer Association instructor, as he explains the principles of Oilheat combustion.



One of several 2003 Wisconsin Oilheat student training groups.



new & Improved

If you were to compare the operating hours consumed by a residential oil burner during a normal winter, it would be analogous to driving your automobile over 32,000 miles in a year. That's a lot of durable performance achieved by a single device.

In similar fashion, the National Oilheat Research Alliance has provided the Oilheat industry with "value added" mileage during the course of its first three years of activity.

As we move ahead during 2004, it's appropriate to summarize the many tangible achievements realized by Oilheat and the consuming public since the Alliance's inception in February of 2001.

The National Oilheat Research Alliance (NORA)

Who we are and what we do.

The National Oilheat Research Alliance (NORA) is a collaborative effort among Oilheat companies in 22 states and regions in the USA. NORA's activities support consumer education, technical training of Oilheat personnel, and research and development projects.

Over ten million homeowners in several colder climate regions of the United States presently heat their homes with oil. NORA's creation provides a means whereby the industry can devote resources to creating better products and services on behalf of the consuming public, provide continuing education to the industry, and advance the development of improved fuels and heating engineering.

NORA's first official meeting took place in February 2001 in Washington, DC, and the organization has made significant impact in the heating field since that time. Headquartered in Alexandria, VA, NORA has established a number of programs to achieve its research, training and education objectives.

Consumer Education Component

A vital part of NORA's mission is keeping consumers informed regarding the latest advances in heating comfort and technology provided by Oilheat fuels and systems.

NORA has developed materials that highlight the benefits of Clearburn Science™— the designation applied to technology that enables today's Oilheat equipment to burn fuel much cleaner and be more environmentally friendly than previously attainable.

NORA's public access website, www.oilheatamerica.com provides an important media presence by which much of the tangible benefits of Oilheat can be explained to consumers. The site also contains reference materials that

explain how heating and hot water systems work, along with related topics of value to homeowners.

A series of pamphlets has also been produced to aid in the home buying and home maintenance processes. These materials were designed to establish more accurate and credible impressions about the merits of Oilheat within the minds of homeowners, realtors and home inspectors.

Publications available from NORA include:

- Open the Door to a More Energy Efficient Home, which gives the homeowner suggestions for saving money as well as energy.
- The Homeowners' Guide diagrams the way most Oilheat systems work today and emphasizes

cleanliness and efficiency as well as alleviating concerns about on-site fuel storage.

- The Real Estate Agent's Guide to Oilheat details the advances of Clearburn Science™, compares hydronic (baseboard and radiant heat systems) to warm air heating systems and also references the fuel efficiency and safety of Oilheat.

Several radio and television information commercials have been produced to convey the message that today's Oilheat is different in content, performance and comfort than many consumers may have realized. These messages are periodically broadcast in designated markets under the joint sponsorship of NORA and participating state and regional Oilheat associations who represent the companies

that form NORA's collaborative operating structure.

The most recent creative effort has evolved as the "99.9% clean, 100% warm" theme that today's Oilheat embodies.



The Technical Training Initiatives of NORA

NORA is dedicated to training heating personnel with both basic and advanced instruction, as well as training the instructors who provide this education.

For that purpose, NORA has developed several materials that are proving invaluable to the industry:

- The Basic Oilheat Technician's Manual was rewritten and redesigned to become a user friendly, up-to-date, precise reference tool for technicians in the field. Since its introduction in late 2002, over 6,500 copies of this 400-page training manual have been purchased by individuals, plus schools and regional Oilheat associations who distribute the manuals to entry-level trainees and students at technical schools. An accompanying teacher's manual serves as the basis for a "Train the Trainer" program.
- Several training videos supplement the written materials. The videos show how to respond to a no heat call and how to perform a proper system tune-up. A library of video technical reference materials is being created that will eventually contain a dozen or more titles.

All technical training materials and other relevant products can be purchased at www.norastore.org, the Alliance's on-line shopping site for the industry.

In addition to the training materials, NORA has established a certification program as a way of recognizing the respective advanced skills and service capabilities of technicians working in the industry.

A complete reference guide to the certification program, plus access to the nearly 200 manufacturers and educators who participate in the certification program can be found on NORA's education website, www.noraed.org.

To meet the continuing demand for technicians in the field, NORA is also involved in a recruitment partnership with the National Association of Oil Heating Service Managers (NAOHSM). This combined effort has brought new personnel into the field and has provided encouragement for those who wish to study Oilheat technology. A CD and accompanying brochure that focus on careers in oil heating are available upon e-mail request to info@naohsm.org or info@nora-oilheat.org.



NORI, The Research Arm of NORA

Most of the research activity initiated by NORA has been assumed and is overseen by the National Oilheat Research Institute (NORI), the R&D affiliate of NORA. Long-term studies are underway in a variety of areas, including fuel performance factors, mechanical features of Oilheat systems and fuel storage and maintenance. NORA was instrumental in establishing the Institute to conduct these programs.

The following projects are active or to be scheduled:

- A fuel performance study conducted by Brookhaven National Laboratory and evaluation of after market additive performance
- An analysis of the best practices for fuel storage, piping, filtration and nozzles
- Fuel quality and measures to adopt to maintain consistently clean Btu output
- Development of an electronic smoke tester
- A comprehensive report of the advantages of Oilheat product with low sulfur content

NORI has also joined OWI, the German counterpart to the research arm of NORA.

Representatives from Brookhaven National Laboratory and NORA have attended OWI conferences to study the low burn firing rates and ultra low sulfur fuels that are now the norm in much of western Europe.

NORA has provided funds to aid US manufacturers in the advancement of practical technologies that have led to:

- A new, ultra high efficiency warm air furnace system (condensing-combustion type, allowing for direct vent applications; i.e., no chimney required). The prototype furnace has displayed the highest combustion efficiency readings of any warm air furnace available.
- An efficient two-stage oil fired warm air furnace system using a modulating (ECM Motor type) circulating air blower that allows for Oilheat and AC to be provided with increased energy efficiency and improved comfort.

NORA publishes periodic newsletters and annual reports that summarize the industry's progress and achievements. Pdf files for years 2001 and 2002 are available at www.nora-oilheat.org.

Printed versions are available upon request from the National Oilheat Research Alliance office at 211 North Union Street, Suite 100, Alexandria, VA 22314.

REMARKS FROM NORA'S TREASURER:

The Finance Committee of the National Oilheat Research Alliance (NORA) is comprised of Chairman Carini (NY), and Messrs. Glick (CT), Greenes (NY), Keyser (VT), Maniscalco (NY), Sullivan (NEFI), Townsend (MA), and Allen (VA) as Ex-Officio.

The Committee's responsibilities include oversight with respect to: the quality and integrity of NORA's financial statements, the accounts of the National Oilheat Research Institute (NORI), a 501 (c)(3) organization which is a wholly-owned subsidiary of NORA established for the purposes of conducting selected research and development projects, the independent auditor's qualifications, the performance of NORA's internal accounting function, and the compliance with all accounting and regulatory requirements.

Also included within the purview of the Finance Committee is the preparation of all reports required to be included in NORA's Annual Report as stipulated in the National Oilheat Research Alliance Act of 2000, Public Law 106-469.

In reference to Program Services: in 2003 NORA committed \$707,679 of net assessment revenue to grants concerning industry Education and Training as compared to \$554,271 in 2002. The grants committed to NORI's Research and Development amounted to \$1,207,679 as compared to \$554,271 in 2002. NORA's total commitment to State Grants for 2003, which this year included a Consumer Education Production Program, totaled \$14,281,597 of net assessment revenue in comparison to \$11,772,201 in 2002. NORA's federally mandated administrative expense cap of 7% of gross revenue came in at 5.1%, amounting to \$910,435 as compared to the 2003 budgeted amount of \$998,000.

Administration expenses which were below budget, due in large part to the prudent management of President John Huber, combined with an increase in collection revenue has resulted in an increase in net assets of \$238,680 for the fiscal year ending December 31, 2003. It must be duly noted that the increase in net assets of \$238,680 is in addition to the funding of the newly instituted Consumer Education Production Program, which amounted to \$2,254,292.

The audited financial report for 2003 follows.

Respectfully submitted,
John D. Maniscalco
Treasurer

NATIONAL OILHEAT RESEARCH ALLIANCE, INC.

EXHIBIT A: CONSOLIDATED STATEMENTS OF FINANCIAL POSITION FOR THE YEARS ENDED DECEMBER 31, 2003 AND DECEMBER 31, 2002

ASSETS	2003	2002
CURRENT ASSETS		
Cash and cash equivalents	\$ 1,792,902	\$1,296,077
Assessments receivable	4,610,772	4,580,438
Prepays and other current assets	26,496	41,257
Total current assets	6,430,170	5,917,772
PROPERTY AND EQUIPMENT		
Office equipment	3,784	1,440
Computer equipment	4,035	3,936
	7,819	5,376
Less accumulated depreciation	(3,598)	(2,588)
Total property and equipment	4,221	2,788
OTHER ASSETS		
	83,184	147,116
TOTAL ASSETS	\$ 6,517,575	\$ 6,067,676
LIABILITIES AND UNRESTRICTED NET ASSETS		
CURRENT LIABILITIES		
Accounts payable	\$ 28,341	\$ 13,979
Accrued expenses	376,863	382,386
Grants payable	1,046,854	446,745
State grant obligations	2,826,774	3,224,503
TOTAL LIABILITIES	4,278,832	4,067,613
NET ASSETS		
Unrestricted net assets	609,447	544,508
Board designated net assets	1,629,296	1,455,555
Total net assets	2,238,743	2,000,063
TOTAL LIABILITIES AND NET ASSETS	\$ 6,517,575	\$ 6,067,676

EXHIBIT B: CONSOLIDATED STATEMENTS OF ACTIVITIES FOR THE YEARS ENDED DECEMBER 31, 2003 AND DECEMBER 31, 2002

	2003	2002
REVENUE AND SUPPORT		
Assessment revenue	\$ 17,477,342	\$ 14,637,440
Interest income	43,120	86,662
Other income	337,051	19,271
Total revenue and support	17,857,513	14,743,373
EXPENSES		
Programs		
Consumer education production	2,254,292	—
Research and development	1,207,679	554,271
Education and training	707,679	554,271
State grants	12,027,305	11,772,201
Total program expenses	16,196,955	12,880,743
GENERAL AND ADMINISTRATIVE		
Administrative costs	910,435	802,449
Collection costs	187,108	242,059
Publication costs	321,596	—
Depreciation	2,739	1,601
Total general and administrative expenses	1,421,878	1,046,109
Total expenses	17,618,833	13,926,852
CHANGE IN UNRESTRICTED NET ASSETS	238,680	816,521
NET ASSETS AT BEGINNING OF YEAR	2,000,063	1,183,542
NET ASSETS AT END OF YEAR	\$ 2,238,743	\$ 2,000,063

EXHIBIT C: CONSOLIDATED STATEMENTS OF CASH FLOWS FOR THE YEARS ENDED DECEMBER 31, 2003 AND DECEMBER 31, 2002

	2003	2002
INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS		
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in unrestricted net assets	\$ 238,680	\$ 816,521
Adjustments to reconcile change in unrestricted net assets to net cash provided by (used in) operating activities		
Depreciation	2,739	1,601
Changes in assets and liabilities:		
(Increase) decrease in assessments receivable	(30,334)	(499,896)
(Increase) decrease in prepaids/deposits	14,761	(22,254)
(Increase) decrease in other assets	63,932	(120,957)
Increase (decrease) in accounts payable and accrued expenses	8,839	185,110
Increase (decrease) in grants payable and state grant obligations	202,380	(3,815,399)
Total adjustments	262,317	(4,271,795)
Net cash provided by (used in) operating activities	500,997	(3,455,274)
CASH FLOWS FROM INVESTING ACTIVITIES		
Purchase of property and equipment	(4,172)	—
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	496,825	(3,455,274)
CASH AND CASH EQUIVALENTS - BEGINNING OF THE YEAR	1,296,077	4,751,351
CASH AND CASH EQUIVALENTS - END OF THE YEAR	\$ 1,792,902	\$ 1,296,077

See independent auditor's report. The accompanying notes are an integral part of these financial statements.

NATIONAL OILHEAT RESEARCH ALLIANCE, INC.
CONSOLIDATED NOTES TO FINANCIAL STATEMENTS

See independent auditor's report. The accompanying notes are an integral part of these financial statements.

NOTE 1 - THE ORGANIZATION

The National Oilheat Research Alliance, Inc. (the Alliance) is a non-profit trade organization developed under the National Oilheat Research Alliance Act of 2000 (NORA), Public Law 106-469, legislation passed by the U.S. Congress and signed into law in November 2000. The Alliance was created to educate consumers about the benefits of Oilheat, to perform research and development, and technical training to provide better customer service. The Alliance's Board consists of members from the Oilheat industry, retail markets, wholesale distributors, public members, and representatives from the states with the highest Oilheat sales. The Alliance was incorporated on January 31, 2001.

NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of Accounting and Consolidation

The financial statements are prepared on the accrual basis of accounting, in accordance with U.S. generally accepted accounting principles. The consolidated financial statements include the accounts of the Alliance and National Oilheat Research Institute (NORI), its wholly-owned subsidiary, after the elimination of all material inter-company transactions and balances.

Accounting Estimates

The preparation of financial statements in accordance with U.S. generally accepted accounting principles requires management to make estimates and assumptions which affect the reported amount of assets, liabilities, revenue and the disclosure of contingencies, if any at the date of the financial statements.

Assessment Revenue

The NORA law requires wholesale distributors of No. 1 distillate and No. 2 dyed distillate to remit an assessment of two-tenths of one cent per gallon at the point of sale. If the No. 1 distillate or No. 2 dyed distillate is imported after the point of sale, the assessment is to be made when the product enters the United States. The assessments are to be remitted to the Alliance quarterly.

Assessments Receivable

An estimate of assessments to be received, but not remitted to the Alliance at the end of the reporting period, are made based on industry statistics.

Property and Equipment

Property and equipment purchased in excess of \$1,000 are recorded at cost. Depreciation of furniture, office and computer equipment is computed by using the straight-line method over the estimated useful lives of the assets. Estimated useful lives by category are:

- Office equipment 5 years
- Computer equipment 3 years

Cash and Cash Equivalents

The Alliance considers all investments with original maturities of three months or less to be cash equivalents.

Consumer Education

Consumer Education costs are expensed as incurred. Consumer Education activities include direct communications with consumers through broadcast media (television and radio) and direct mail. Total costs for the years ended December 31, 2003 and 2002 were \$9,000,000 and \$8,471,000, respectively.

Concentrations of Credit Risk

The Alliance maintains cash deposits with Merrill Lynch in excess of federally insured limits of \$100,000. However, the Securities Investor Protection Corporation (SIPC) protects securities and cash in Merrill Lynch accounts for up to \$500,000 per client for securities (including up to \$100,000 for cash). Merrill Lynch has also obtained coverage in excess of the SIPC limits.

Interest Income

Interest income earned on the Alliance's cash deposits is not allocated to specific projects. When the budgeting and cash flow needs of the Alliance are more readily determinable, interest income will be utilized to advance the Alliance's programs.

NOTE 3 - INCOME TAX STATUS

The Alliance qualifies as a tax-exempt organization under Internal Revenue Code Section 501(c)(6). Consequently, the Alliance is exempt from Federal and state income tax except for income tax on unrelated business income. There were no unrelated business activities in 2003 and 2002.

NOTE 4 - COMMITMENTS

Accounting Firm

The Alliance has contracted with an accounting firm to maintain the accounting records, prepare monthly and annual financial statements, assist in the preparation of the annual budget, and to monitor the collection of the Alliance assessment revenue. Approximately 80 percent of the firm's effort relates to collection activities. Therefore, a portion of the monthly fees are allocated to collection costs. The contract expires on August 1, 2004 and contains two automatic annual renewal options. The average monthly commitment is \$7,850.

Office Building

The Alliance entered an operating lease for office space. The lease calls for monthly payments of \$2,515, contains a term of twelve months and is renewable each year. Rent expense for the years ended December 31, 2003 and 2002 totaled \$46,320 and \$29,644, respectively.

NOTE 5 - ADMINISTRATIVE EXPENSE CAP

NORA, Public Law 106-469, requires that the Alliance limit expenditures for "Administrative" expenses to seven percent of gross revenue generated by assessment remittances.

NOTE 6 - PROGRAM SERVICES

Research and Development

The Alliance committed 6.99 percent in 2003 and 3.95 percent in 2002 of assessment revenue, net of collection costs and the Board designated reserve, for Oilheat research and development grants.

The 2003 commitment totaled \$1,207,679.

The 2002 commitment totaled \$554,271.

Education and Training

The Alliance committed 4.08 percent in 2003 and 3.95 percent in 2002 of assessment revenue, net of collection costs and the Board designated reserve, for grants related to education and training.

The 2003 commitment totaled \$707,679.

The 2002 commitment totaled \$554,271.

Consumer Education Production

The consumer education production program commenced in 2003. The Alliance committed 13.17 percent in 2003 of assessment revenue, net of collection costs and the Board designated reserve, for grants related to consumer education. The 2003 commitment totaled \$2,254,292.

State Grants

The Alliance has committed 70.6 percent in 2003 and 83.8 percent in 2002 of net assessment revenue for state grants. In addition, the costs for the consumer education production program were incurred by the Alliance on behalf of the states. Thus, the total commitment for state grants was \$14,281,597 or 83.4 percent of net assessment revenue. The 2002 commitment totaled \$11,772,201.

The Alliance is mandated by law to establish a program coordinating the operation of the Alliance with the operator of any similar state or local program. Remittances to state programs are required to equal 15 percent of the assessment revenue collected in the state. During 2003, the Alliance is distributing 95 percent of the net assessment revenue as follows:

Assessment revenue	\$ 17,477,342
Less: collection costs	(187,108)
Less: Board designated net assets	(174,077)
Net assessment revenue	\$ 17,116,157

Grants and state grants (94.63 percent of net assessment revenue)
\$ 16,196,955

NOTE 7 - GRANTS PAYABLE

The Alliance enters into various grant agreements which may require periodic payments of grant funds. The outstanding grant liability at December 31, 2003 and 2002 was \$1,046,854 and \$446,745, respectively.

NOTE 8 - BOARD DESIGNATED NET ASSETS

The Board has designated an amount equal to ten percent of annual assessments to be reserved in response to unpredictable weather patterns. The funds will be utilized in future years, with Board approval, to advance the Alliance's programs. The Board's designated net assets at December 31, 2003 totaled \$1,629,296.

NOTE 9 - ASSESSMENT AND COLLECTION COSTS

Assessments and collection costs include the costs incurred to process annual assessments, to publicize the collection system and to ascertain compliance as stipulated by NORA law. Collection costs consist of the following:

Legal fees	\$ 111,748
Accounting fees	\$ 75,360
Total	\$ 187,108

NOTE 10 - NATIONAL OILHEAT RESEARCH INSTITUTE

The National Oilheat Research Institute (NORI) is a 501(c)(3) organization created by NORA for the purposes of conducting selected research projects. NORA has provided the majority of NORI's funding. Project funding, totaling \$815,715 and \$620,000, has been approved by the NORA board for 2003 and 2002, respectively. Actual distributions of approved funding totaled \$716,447 in 2003 and \$368,140 in 2002.

NOTE 11 - ASSESSMENT REFUNDS

Assessment revenue excludes collections which will be returned as refunds. The Alliance collects assessments on all dyed fuel that exceeds 500 parts-per-million of sulfur. Some of this fuel is used for non-heating applications and is refunded.

The Alliance anticipates refunds will approximate \$2.1 million per year and has established the appropriate reserve. As actual refunds are paid, the reserve is adjusted. Refunds for the years ended December 31, 2003 and 2002 were \$1,914,360 and \$825,052, respectively.

See independent auditor's report. The accompanying notes are an integral part of these financial statements.

INDEPENDENT AUDITOR'S REPORT
Board of Directors
National Oilheat Research Alliance, Inc.
Alexandria, Virginia

We have audited the accompanying consolidated statements of financial position of the National Oilheat Research Alliance, Inc. as of December 31, 2003 and 2002, and the related consolidated statements of activities and cash flows and for the years then ended. These financial statements are the responsibility of the Alliance's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation.

We believe that our audits provide a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the National Oilheat Research Alliance, Inc. as of December 31, 2003 and 2002, and the change in its net assets and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

ROSS, LANGAN & MCKENDREE, L.L.P.
CERTIFIED PUBLIC ACCOUNTANTS
McLEAN, VIRGINIA 22101
March 5, 2004

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