

|                                                                                                                                                                                                                                                                                                                     |                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| <b>Part II Signature Block</b>                                                                                                                                                                                                                                                                                      |                                                                           |
| Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge |                                                                           |
| <b>Sign Here</b>                                                                                                                                                                                                                                                                                                    | *****<br>Signature of officer                                             |
|                                                                                                                                                                                                                                                                                                                     | 2020-09-04<br>Date                                                        |
|                                                                                                                                                                                                                                                                                                                     | JOHN HUBER PRESIDENT<br>Type or print name and title                      |
| <b>Paid Preparer Use Only</b>                                                                                                                                                                                                                                                                                       | Print/Type preparer's name                                                |
|                                                                                                                                                                                                                                                                                                                     | Preparer's signature                                                      |
|                                                                                                                                                                                                                                                                                                                     | Date                                                                      |
|                                                                                                                                                                                                                                                                                                                     | Check <input checked="" type="checkbox"/> if self-employed PTIN P00057870 |
|                                                                                                                                                                                                                                                                                                                     | Firm's name ▶ ROSS LANGAN & MCKENDREE LLP                                 |
|                                                                                                                                                                                                                                                                                                                     | Firm's EIN ▶ 52-0901831                                                   |
|                                                                                                                                                                                                                                                                                                                     | Firm's address ▶ 7900 WESTPARK DR STE T420<br>MCLEAN, VA 22102            |
|                                                                                                                                                                                                                                                                                                                     | Phone no (703) 893-2660                                                   |

**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response or note to any line in this Part III ☒**1** Briefly describe the organization's mission

EDUCATE CONSUMERS ABOUT THE BENEFITS OF OILHEAT, PERFORM RESEARCH AND DEVELOPMENT, ENCOURAGE HEATING OIL EFFICIENCY AND UPGRADES, AND PROVIDE TECHNICAL TRAINING TO PROVIDE BETTER CUSTOMER SERVICE

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported**4a** (Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

See Additional Data

**4b** (Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

See Additional Data

**4c** (Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

See Additional Data

(Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

IN ADDITION TO THE SPECIFIC PROGRAM COMMITMENTS DISCUSSED PREVIOUSLY, THE ALLIANCE HAS COMMITTED \$1,618,085, WHICH IS 22 PERCENT OF NET 2019 ASSESSMENT REVENUE AFTER DEDUCTING THE AMOUNT ADDED TO NET ASSETS UNAVAILABLE FOR OBLIGATION UNTIL OCTOBER 1, 2028, FOR STATE REBATES THAT HAVE NOT YET BEEN ALLOCATED TO A PROGRAM SPECIFIED IN PUBLIC LAW 115-334. THE ALLIANCE PLANS TO ALLOCATE THESE STATE REBATES TO THE RESEARCH, DEVELOPMENT, AND DEMONSTRATION AND/OR HEATING OIL EFFICIENCY AND UPGRADE PROGRAMS. STATE ORGANIZATIONS DEVELOP DETAILED PLANS FOR USE OF THE REBATES TO DO WORK UNDER THESE PROGRAMS. THESE FUNDS WILL BE ALLOCATED BETWEEN PROGRAMS IN ACCORDANCE WITH THE REQUIREMENTS OF PUBLIC LAWS 113-79 AND 115-334 AS DISCUSSED PREVIOUSLY.

**4d** Other program services (Describe in Schedule O )  
(Expenses \$ including grants of \$ ) (Revenue \$ )**4e** Total program service expenses ►

**Part IV Checklist of Required Schedules**

|                                                                                                                                                                                                                                                                                                                              | Yes            | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----|
| <b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A . . . . .                                                                                                                                                                         | <b>1</b>       | No |
| <b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? . . . . .                                                                                                                                                                                                         | <b>2</b>       | No |
| <b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .                                                                                                                      | <b>3</b>       | No |
| <b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II . . . . .                                                                                                              | <b>4</b>       |    |
| <b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III . . . . .                                                                               | <b>5</b>       | No |
| <b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I . . . . .                                                    | <b>6</b>       | No |
| <b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II . . . . .                                                                                            | <b>7</b>       | No |
| <b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III . . . . .                                                                                                                                                         | <b>8</b>       | No |
| <b>9</b> Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV . . . . .             | <b>9</b>       | No |
| <b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi endowments? If "Yes," complete Schedule D, Part V . . . . .                                                                                                     | <b>10</b>      | No |
| <b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable                                                                                                                                                                     |                |    |
| <b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI . . . . .                                                                                                                                                                       | <b>11a</b> Yes |    |
| <b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII . . . . .                                                                                                     | <b>11b</b>     | No |
| <b>c</b> Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII . . . . .                                                                                                     | <b>11c</b>     | No |
| <b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX . . . . .                                                                                                                      | <b>11d</b>     | No |
| <b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X . . . . .                                                                                                                                                                                     | <b>11e</b>     | No |
| <b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X . . . . .                                                            | <b>11f</b> Yes |    |
| <b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII . . . . .                                                                                                                                                        | <b>12a</b> Yes |    |
| <b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional . . . . .                                                                           | <b>12b</b>     | No |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .                                                                                                                                                                                                        | <b>13</b>      | No |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .                                                                                                                                                                                                             | <b>14a</b>     | No |
| <b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV . . . . . | <b>14b</b>     | No |
| <b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV . . . . .                                                                                                           | <b>15</b>      | No |
| <b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV . . . . .                                                                                                     | <b>16</b>      | No |
| <b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions) . . . . .                                                                                            | <b>17</b>      | No |
| <b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II . . . . .                                                                                                                           | <b>18</b>      | No |
| <b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III . . . . .                                                                                                                                                     | <b>19</b>      | No |
| <b>20a</b> Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H . . . . .                                                                                                                                                                                                             | <b>20a</b>     | No |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .                                                                                                                                                                                              | <b>20b</b>     |    |
| <b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II . . . . .                                                                                            | <b>21</b> Yes  |    |

**Part IV Checklist of Required Schedules** (continued)

|                                                                                                                                                                                                                                                                                                                                                                                                       | Yes        | No  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----|
| <b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III . . . . .                                                                                                                                                                                         | <b>22</b>  | No  |
| <b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J . . . . .                                                                                                                              | <b>23</b>  | Yes |
| <b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . . . .                                                                                                   | <b>24a</b> | No  |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .                                                                                                                                                                                                                                                                                  | <b>24b</b> |     |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .                                                                                                                                                                                                                                         | <b>24c</b> |     |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .                                                                                                                                                                                                                                                                            | <b>24d</b> |     |
| <b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I . . . . .                                                                                                                                                                       | <b>25a</b> |     |
| <b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I . . . . .                                                                                                                | <b>25b</b> |     |
| <b>26</b> Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II . . . . .                                                         | <b>26</b>  | No  |
| <b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III . . . . . | <b>27</b>  | No  |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)                                                                                                                                                                                                |            |     |
| <b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV . . . . .                                                                                                                                                                                                                               | <b>28a</b> | No  |
| <b>b</b> A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV . . . . .                                                                                                                                                                                                                                                                                    | <b>28b</b> | No  |
| <b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? If "Yes," complete Schedule L, Part IV . . . . .                                                                                                                                                                                                                                      | <b>28c</b> | No  |
| <b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M . . . . .                                                                                                                                                                                                                                                                          | <b>29</b>  | No  |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M . . . . .                                                                                                                                                                                                          | <b>30</b>  | No  |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I . . . . .                                                                                                                                                                                                                                                                | <b>31</b>  | No  |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II . . . . .                                                                                                                                                                                                                                              | <b>32</b>  | No  |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I . . . . .                                                                                                                                                                                              | <b>33</b>  | No  |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . . . .                                                                                                                                                                                                                                          | <b>34</b>  | No  |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?                                                                                                                                                                                                                                                                                                    | <b>35a</b> | No  |
| <b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 . . . . .                                                                                                                                                                  | <b>35b</b> |     |
| <b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 . . . . .                                                                                                                                                                                                          | <b>36</b>  |     |
| <b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI . . . . .                                                                                                                                                     | <b>37</b>  | No  |
| <b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .                                                                                                                                                                                               | <b>38</b>  | Yes |

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

|                                                                                                                                                                             | Yes       | No |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----|
| <b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable . . . . .                                                                            | <b>1a</b> | 19 |
| <b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable . . . . .                                                                          | <b>1b</b> | 0  |
| <b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . . | <b>1c</b> |    |

**Part V** **Statements Regarding Other IRS Filings and Tax Compliance** (continued)

|                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----|----|
| <b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . . .                                                                         | <div style="border: 1px solid black; width: 100px; height: 30px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>2a</b></div> <div style="width: 60px;"></div> </div> <div style="text-align: right; margin-top: -10px;">5</div> |            |     |    |
| <b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?<br><b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)                               |                                                                                                                                                                                                                                                                                                                                 | <b>2b</b>  | Yes |    |
| <b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? . . .                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                 | <b>3a</b>  |     | No |
| <b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O . . .                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                 | <b>3b</b>  |     |    |
| <b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . .                |                                                                                                                                                                                                                                                                                                                                 | <b>4a</b>  |     | No |
| <b>b</b> If "Yes," enter the name of the foreign country <span style="border-bottom: 1px solid black; display: inline-block; width: 150px;"></span><br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . .                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                 | <b>5a</b>  |     | No |
| <b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                 | <b>5b</b>  |     | No |
| <b>c</b> If "Yes," to line 5a or 5b, did the organization file Form 8886-T? . . . . .                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                 | <b>5c</b>  |     |    |
| <b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . .                                                   |                                                                                                                                                                                                                                                                                                                                 | <b>6a</b>  |     | No |
| <b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .                                                                                                          |                                                                                                                                                                                                                                                                                                                                 | <b>6b</b>  |     |    |
| <b>7 Organizations that may receive deductible contributions under section 170(c).</b>                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .                                                                                                        |                                                                                                                                                                                                                                                                                                                                 | <b>7a</b>  |     |    |
| <b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                 | <b>7b</b>  |     |    |
| <b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .                                                                                                                   |                                                                                                                                                                                                                                                                                                                                 | <b>7c</b>  |     |    |
| <b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year . . . . .                                                                                                                                                                                      | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>7d</b></div> <div style="width: 60px;"></div> </div>                                                            |            |     |    |
| <b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                 | <b>7e</b>  |     |    |
| <b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . .                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                 | <b>7f</b>  |     |    |
| <b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .                                                                                                                       |                                                                                                                                                                                                                                                                                                                                 | <b>7g</b>  |     |    |
| <b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .                                                                                                                     |                                                                                                                                                                                                                                                                                                                                 | <b>7h</b>  |     |    |
|                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .                                                                |                                                                                                                                                                                                                                                                                                                                 | <b>8</b>   |     |    |
|                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>9 Sponsoring organizations maintaining donor advised funds.</b>                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>a</b> Did the sponsoring organization make any taxable distributions under section 4966? . . . . .                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                 | <b>9a</b>  |     |    |
| <b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . .                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                 | <b>9b</b>  |     |    |
|                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>10 Section 501(c)(7) organizations.</b> Enter                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>a</b> Initiation fees and capital contributions included on Part VIII, line 12 . . . . .                                                                                                                                                                               | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>10a</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
| <b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities                                                                                                                                                                      | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>10b</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
| <b>11 Section 501(c)(12) organizations.</b> Enter                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>a</b> Gross income from members or shareholders . . . . .                                                                                                                                                                                                              | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>11a</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
| <b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them) . . . . .                                                                                                                            | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>11b</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
| <b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                 | <b>12a</b> |     |    |
| <b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year                                                                                                                                                                            | <div style="border: 1px solid black; width: 100px; height: 30px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>12b</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
|                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                 |            |     |    |
| <b>a</b> Is the organization licensed to issue qualified health plans in more than one state? . . . . .<br><b>Note.</b> See the instructions for additional information the organization must report on Schedule O                                                        |                                                                                                                                                                                                                                                                                                                                 | <b>13a</b> |     |    |
| <b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .                                                                                              | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>13b</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
| <b>c</b> Enter the amount of reserves on hand . . . . .                                                                                                                                                                                                                   | <div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"> <div style="border-right: 1px solid black; width: 40px; text-align: center;"><b>13c</b></div> <div style="width: 60px;"></div> </div>                                                           |            |     |    |
| <b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? . . . . .                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                 | <b>14a</b> |     | No |
| <b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O . . .                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                 | <b>14b</b> |     |    |
| <b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? . . . . .<br>If "Yes," see instructions and file Form 4720, Schedule N                               |                                                                                                                                                                                                                                                                                                                                 | <b>15</b>  |     | No |
| <b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? . . .<br>If "Yes," complete Form 4720, Schedule O                                                                                               |                                                                                                                                                                                                                                                                                                                                 | <b>16</b>  |     | No |

**Part VI**

**Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI ☒

**Section A. Governing Body and Management**

|           |                                                                                                                                                                                                                     | Yes | No  |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|
| <b>1a</b> | Enter the number of voting members of the governing body at the end of the tax year                                                                                                                                 | 43  |     |
|           | If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O    |     |     |
| <b>b</b>  | Enter the number of voting members included in line 1a, above, who are independent                                                                                                                                  | 42  |     |
| <b>2</b>  | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?                                               | 2   | No  |
| <b>3</b>  | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? | 3   | No  |
| <b>4</b>  | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?                                                                                                    | 4   | No  |
| <b>5</b>  | Did the organization become aware during the year of a significant diversion of the organization's assets?                                                                                                          | 5   | No  |
| <b>6</b>  | Did the organization have members or stockholders?                                                                                                                                                                  | 6   | Yes |
| <b>7a</b> | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?                                                                  | 7a  | No  |
| <b>b</b>  | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?                                                           | 7b  | No  |
| <b>8</b>  | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:                                                                                   |     |     |
| <b>a</b>  | The governing body?                                                                                                                                                                                                 | 8a  | Yes |
| <b>b</b>  | Each committee with authority to act on behalf of the governing body?                                                                                                                                               | 8b  | Yes |
| <b>9</b>  | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O.       | 9   | No  |

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

|            |                                                                                                                                                                                                                                                                                              | Yes | No  |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|
| <b>10a</b> | Did the organization have local chapters, branches, or affiliates?                                                                                                                                                                                                                           | 10a | No  |
| <b>b</b>   | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?                                                                   | 10b |     |
| <b>11a</b> | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?                                                                                                                                                                  | 11a | No  |
| <b>b</b>   | Describe in Schedule O the process, if any, used by the organization to review this Form 990.                                                                                                                                                                                                |     |     |
| <b>12a</b> | Did the organization have a written conflict of interest policy? If "No," go to line 13.                                                                                                                                                                                                     | 12a | Yes |
| <b>b</b>   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?                                                                                                                                                          | 12b | Yes |
| <b>c</b>   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done.                                                                                                                                          | 12c | Yes |
| <b>13</b>  | Did the organization have a written whistleblower policy?                                                                                                                                                                                                                                    | 13  | No  |
| <b>14</b>  | Did the organization have a written document retention and destruction policy?                                                                                                                                                                                                               | 14  | No  |
| <b>15</b>  | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?                                                                         |     |     |
| <b>a</b>   | The organization's CEO, Executive Director, or top management official                                                                                                                                                                                                                       | 15a | Yes |
| <b>b</b>   | Other officers or key employees of the organization                                                                                                                                                                                                                                          | 15b | No  |
|            | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).                                                                                                                                                                                                          |     |     |
| <b>16a</b> | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?                                                                                                                                        | 16a | No  |
| <b>b</b>   | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? | 16b |     |

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed: \_\_\_\_\_

**18** Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records:  
 ► SIKICH LLP 1199 NORTH FAIRFAX STREET 10TH ALEXANDRIA, VA 22314 (703) 836-1350

## Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII ☐

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See instructions for the order in which to list the persons above

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

[illegible]

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

| (A)<br>Name and title                                           | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                 |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| See Additional Data Table                                       |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                 |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
| <b>1b Sub-Total</b>                                             |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
| <b>1c Total from continuation sheets to Part VII, Section A</b> |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
| <b>1d Total (add lines 1b and 1c)</b>                           |                                                                                            |                                                                                                           |                       |         |              |                              |        | 409,890                                                              | 0                                                                         | 21,051                                                                                        |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **▶ 2**

|                                                                                                                                                                                                                                              | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>3</b> Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>                                        |     | No |
| <b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> | Yes |    |
| <b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>                       |     | No |

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A)<br>Name and business address                                               | (B)<br>Description of services  | (C)<br>Compensation |
|--------------------------------------------------------------------------------|---------------------------------|---------------------|
| WARM THOUGHTS COMMUNICATIONS<br>4 BRIGHTON ROAD SUITE 300<br>CLIFTON, NJ 07012 | MARKETING SERVICES              | 1,199,722           |
| PRIMEDIA INC<br>401 FRANKLIN AVE SUITE 310<br>GARDEN CITY, NY 11530            | MARKETING SERVICES              | 365,941             |
| PENNSYLVANIA PETROLEUM ASSOC<br>911B S EISENHOWER BLVD<br>MIDDLETOWN, PA 17057 | EDUCATION AND TRAINING SERVICES | 335,596             |
| OILHEAT ASSOCIATES INC<br>1597 EARL RD<br>WANTAGH, NY 11793                    | EDUCATION AND TRAINING SERVICES | 324,593             |
| BOSTON ENVIRONMENTAL<br>600 STATE STREET SUITE 7<br>PORTSMOUTH, NH 03801       | MARKETING SERVICES              | 215,858             |

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **▶ 11**

Part VIII

Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

|                                                           |                                                                                                                                      |                                                                                      | (A)<br>Total revenue                                                                        | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from<br>tax under sections<br>512 - 514 |  |
|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|----------------------------------------------------|-----------------------------------------|--------------------------------------------------------------------|--|
| Contributions, Gifts, Grants<br>and Other Similar Amounts | 1a                                                                                                                                   | Federated campaigns . . .                                                            | 1a                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | b                                                                                                                                    | Membership dues . . .                                                                | 1b                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | c                                                                                                                                    | Fundraising events . . .                                                             | 1c                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | d                                                                                                                                    | Related organizations                                                                | 1d                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | e                                                                                                                                    | Government grants (contributions)                                                    | 1e                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | f                                                                                                                                    | All other contributions, gifts, grants,<br>and similar amounts not included<br>above | 1f                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | g                                                                                                                                    | Noncash contributions included in<br>lines 1a - 1f \$                                | 1g                                                                                          |                                                    |                                         |                                                                    |  |
|                                                           | h                                                                                                                                    | Total. Add lines 1a-1f . . . . . ▶                                                   |                                                                                             |                                                    |                                         |                                                                    |  |
| Program Service Revenue                                   | 2a                                                                                                                                   |                                                                                      | Business Code                                                                               |                                                    |                                         |                                                                    |  |
|                                                           | OILHEAT ASSESSMENTS                                                                                                                  |                                                                                      | 900099                                                                                      | 9,105,616                                          | 9,105,616                               |                                                                    |  |
|                                                           | b RESEARCH CONTRACTS                                                                                                                 |                                                                                      | 900099                                                                                      | 250,045                                            | 250,045                                 |                                                                    |  |
|                                                           | c                                                                                                                                    |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | d                                                                                                                                    |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | e                                                                                                                                    |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | f All other program service revenue                                                                                                  |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | g Total. Add lines 2a-2f. . . . . ▶                                                                                                  |                                                                                      | 9,355,661                                                                                   |                                                    |                                         |                                                                    |  |
| Other Revenue                                             | 3                                                                                                                                    |                                                                                      | Investment income (including dividends, interest, and other<br>similar amounts) . . . . . ▶ | 68,717                                             |                                         | 68,717                                                             |  |
|                                                           | 4                                                                                                                                    |                                                                                      | Income from investment of tax-exempt bond proceeds ▶                                        |                                                    |                                         |                                                                    |  |
|                                                           | 5                                                                                                                                    |                                                                                      | Royalties . . . . . ▶                                                                       |                                                    |                                         |                                                                    |  |
|                                                           | 6a                                                                                                                                   | Gross rents                                                                          | (i) Real                                                                                    | (ii) Personal                                      |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | 6b                                                                                                                                   | Less rental<br>expenses                                                              |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | 6c                                                                                                                                   | Rental income<br>or (loss)                                                           |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           | d                                                                                                                                    |                                                                                      | Net rental income or (loss) . . . . . ▶                                                     |                                                    |                                         |                                                                    |  |
|                                                           | 7a                                                                                                                                   | Gross amount<br>from sales of<br>assets other<br>than inventory                      | (i) Securities                                                                              | (ii) Other                                         |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| 7b                                                        | Less cost or<br>other basis and<br>sales expenses                                                                                    |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| 7c                                                        | Gain or (loss)                                                                                                                       |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| d                                                         |                                                                                                                                      | Net gain or (loss) . . . . . ▶                                                       |                                                                                             |                                                    |                                         |                                                                    |  |
| 8a                                                        | Gross income from fundraising events<br>(not including \$ of<br>contributions reported on line 1c)<br>See Part IV, line 18 . . . . . |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| 8b                                                        | Less direct expenses . . . . .                                                                                                       |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| c                                                         |                                                                                                                                      | Net income or (loss) from fundraising events . . . ▶                                 |                                                                                             |                                                    |                                         |                                                                    |  |
| 9a                                                        | Gross income from gaming activities<br>See Part IV, line 19 . . . . .                                                                |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| 9b                                                        | Less direct expenses . . . . .                                                                                                       |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| c                                                         |                                                                                                                                      | Net income or (loss) from gaming activities . . . ▶                                  |                                                                                             |                                                    |                                         |                                                                    |  |
| 10a                                                       | Gross sales of inventory, less<br>returns and allowances . . .                                                                       |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| 10b                                                       | Less cost of goods sold . . .                                                                                                        |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
|                                                           |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| c                                                         |                                                                                                                                      | Net income or (loss) from sales of inventory . . . ▶                                 |                                                                                             |                                                    |                                         |                                                                    |  |
| Miscellaneous Revenue                                     |                                                                                                                                      | Business Code                                                                        |                                                                                             |                                                    |                                         |                                                                    |  |
| 11a                                                       |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| b                                                         |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| c                                                         |                                                                                                                                      |                                                                                      |                                                                                             |                                                    |                                         |                                                                    |  |
| d All other revenue . . . . .                             |                                                                                                                                      |                                                                                      | 3,636                                                                                       | 3,636                                              |                                         |                                                                    |  |
| e Total. Add lines 11a-11d . . . . . ▶                    |                                                                                                                                      |                                                                                      | 3,636                                                                                       |                                                    |                                         |                                                                    |  |
| 12 Total revenue. See instructions . . . . . ▶            |                                                                                                                                      |                                                                                      | 9,427,670                                                                                   | 9,358,953                                          | 0                                       | 68,717                                                             |  |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX. ☒

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.                                                                                                                                                                    | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| <b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.                                                                                                                                    | 5,036,455             |                                 |                                        |                             |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22.                                                                                                                                                               |                       |                                 |                                        |                             |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.                                                                                                        |                       |                                 |                                        |                             |
| <b>4</b> Benefits paid to or for members.                                                                                                                                                                                                         |                       |                                 |                                        |                             |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees.                                                                                                                                                                | 302,197               |                                 |                                        |                             |
| <b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).                                                                                           |                       |                                 |                                        |                             |
| <b>7</b> Other salaries and wages.                                                                                                                                                                                                                | 278,842               |                                 |                                        |                             |
| <b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).                                                                                                                                      | 20,654                |                                 |                                        |                             |
| <b>9</b> Other employee benefits.                                                                                                                                                                                                                 | 10,598                |                                 |                                        |                             |
| <b>10</b> Payroll taxes.                                                                                                                                                                                                                          | 34,185                |                                 |                                        |                             |
| <b>11</b> Fees for services (non-employees):                                                                                                                                                                                                      |                       |                                 |                                        |                             |
| <b>a</b> Management.                                                                                                                                                                                                                              |                       |                                 |                                        |                             |
| <b>b</b> Legal.                                                                                                                                                                                                                                   | 77,686                |                                 |                                        |                             |
| <b>c</b> Accounting.                                                                                                                                                                                                                              | 220,591               |                                 |                                        |                             |
| <b>d</b> Lobbying.                                                                                                                                                                                                                                |                       |                                 |                                        |                             |
| <b>e</b> Professional fundraising services. See Part IV, line 17.                                                                                                                                                                                 |                       |                                 |                                        |                             |
| <b>f</b> Investment management fees.                                                                                                                                                                                                              |                       |                                 |                                        |                             |
| <b>g</b> Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).                                                                                                                              | 751,487               |                                 |                                        |                             |
| <b>12</b> Advertising and promotion.                                                                                                                                                                                                              | 60,573                |                                 |                                        |                             |
| <b>13</b> Office expenses.                                                                                                                                                                                                                        | 106,781               |                                 |                                        |                             |
| <b>14</b> Information technology.                                                                                                                                                                                                                 | 13,760                |                                 |                                        |                             |
| <b>15</b> Royalties.                                                                                                                                                                                                                              |                       |                                 |                                        |                             |
| <b>16</b> Occupancy.                                                                                                                                                                                                                              | 65,791                |                                 |                                        |                             |
| <b>17</b> Travel.                                                                                                                                                                                                                                 | 627                   |                                 |                                        |                             |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials.                                                                                                                                         |                       |                                 |                                        |                             |
| <b>19</b> Conferences, conventions, and meetings.                                                                                                                                                                                                 | 1,779                 |                                 |                                        |                             |
| <b>20</b> Interest.                                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| <b>21</b> Payments to affiliates.                                                                                                                                                                                                                 |                       |                                 |                                        |                             |
| <b>22</b> Depreciation, depletion, and amortization.                                                                                                                                                                                              | 17,751                |                                 |                                        |                             |
| <b>23</b> Insurance.                                                                                                                                                                                                                              | 17,909                |                                 |                                        |                             |
| <b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)                                       |                       |                                 |                                        |                             |
| <b>a</b>                                                                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>b</b>                                                                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>c</b>                                                                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>d</b>                                                                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>e</b> All other expenses.                                                                                                                                                                                                                      | 1,246                 |                                 |                                        |                             |
| <b>25</b> Total functional expenses. Add lines 1 through 24e.                                                                                                                                                                                     | 7,018,912             |                                 |                                        |                             |
| <b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). |                       |                                 |                                        |                             |

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part IX ☐

|                                                                                      |                                                                                                                                                                                                                                | (A)<br>Beginning of year |            | (B)<br>End of year |
|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|------------|--------------------|
| <b>Assets</b>                                                                        | <b>1</b> Cash—non-interest-bearing . . . . .                                                                                                                                                                                   |                          | <b>1</b>   | 1,000,000          |
|                                                                                      | <b>2</b> Savings and temporary cash investments . . . . .                                                                                                                                                                      | 9,151,550                | <b>2</b>   | 9,914,646          |
|                                                                                      | <b>3</b> Pledges and grants receivable, net . . . . .                                                                                                                                                                          |                          | <b>3</b>   |                    |
|                                                                                      | <b>4</b> Accounts receivable, net . . . . .                                                                                                                                                                                    | 3,151,561                | <b>4</b>   | 3,008,738          |
|                                                                                      | <b>5</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . .  |                          | <b>5</b>   |                    |
|                                                                                      | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) . . . . .                                                           |                          | <b>6</b>   |                    |
|                                                                                      | <b>7</b> Notes and loans receivable, net . . . . .                                                                                                                                                                             |                          | <b>7</b>   |                    |
|                                                                                      | <b>8</b> Inventories for sale or use . . . . .                                                                                                                                                                                 |                          | <b>8</b>   |                    |
|                                                                                      | <b>9</b> Prepaid expenses and deferred charges . . . . .                                                                                                                                                                       | 147,241                  | <b>9</b>   | 105,183            |
|                                                                                      | <b>10a</b> Land, buildings, and equipment—cost or other basis—Complete Part VI of Schedule D                                                                                                                                   | <b>10a</b> 128,106       |            |                    |
|                                                                                      | <b>b</b> Less—accumulated depreciation                                                                                                                                                                                         | <b>10b</b> 116,892       | 16,977     | <b>10c</b> 11,214  |
|                                                                                      | <b>11</b> Investments—publicly traded securities . . . . .                                                                                                                                                                     |                          | <b>11</b>  |                    |
|                                                                                      | <b>12</b> Investments—other securities—See Part IV, line 11 . . . . .                                                                                                                                                          |                          | <b>12</b>  |                    |
|                                                                                      | <b>13</b> Investments—program-related—See Part IV, line 11 . . . . .                                                                                                                                                           |                          | <b>13</b>  |                    |
|                                                                                      | <b>14</b> Intangible assets . . . . .                                                                                                                                                                                          |                          | <b>14</b>  |                    |
|                                                                                      | <b>15</b> Other assets—See Part IV, line 11 . . . . .                                                                                                                                                                          | 21,146                   | <b>15</b>  | 24,514             |
| <b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . . | 12,488,475                                                                                                                                                                                                                     | <b>16</b>                | 14,064,295 |                    |
| <b>Liabilities</b>                                                                   | <b>17</b> Accounts payable and accrued expenses . . . . .                                                                                                                                                                      | 1,166,030                | <b>17</b>  | 1,117,724          |
|                                                                                      | <b>18</b> Grants payable . . . . .                                                                                                                                                                                             | 5,073,343                | <b>18</b>  | 4,288,711          |
|                                                                                      | <b>19</b> Deferred revenue . . . . .                                                                                                                                                                                           | 764                      | <b>19</b>  | 764                |
|                                                                                      | <b>20</b> Tax-exempt bond liabilities . . . . .                                                                                                                                                                                |                          | <b>20</b>  |                    |
|                                                                                      | <b>21</b> Escrow or custodial account liability—Complete Part IV of Schedule D                                                                                                                                                 |                          | <b>21</b>  |                    |
|                                                                                      | <b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . . |                          | <b>22</b>  |                    |
|                                                                                      | <b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .                                                                                                                                             |                          | <b>23</b>  |                    |
|                                                                                      | <b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .                                                                                                                                               |                          | <b>24</b>  |                    |
|                                                                                      | <b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24)—Complete Part X of Schedule D                                               |                          | <b>25</b>  |                    |
|                                                                                      | <b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 . . . . .                                                                                                                                                          | 6,240,137                | <b>26</b>  | 5,407,199          |
| <b>Net Assets or Fund Balances</b>                                                   | <b>Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.</b>                                                                                           |                          |            |                    |
|                                                                                      | <b>27</b> Net assets without donor restrictions . . . . .                                                                                                                                                                      | 6,248,338                | <b>27</b>  | 8,657,096          |
|                                                                                      | <b>28</b> Net assets with donor restrictions . . . . .                                                                                                                                                                         |                          | <b>28</b>  |                    |
|                                                                                      | <b>Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.</b>                                                                                                    |                          |            |                    |
|                                                                                      | <b>29</b> Capital stock or trust principal, or current funds . . . . .                                                                                                                                                         |                          | <b>29</b>  |                    |
|                                                                                      | <b>30</b> Paid-in or capital surplus, or land, building or equipment fund . . . . .                                                                                                                                            |                          | <b>30</b>  |                    |
|                                                                                      | <b>31</b> Retained earnings, endowment, accumulated income, or other funds                                                                                                                                                     |                          | <b>31</b>  |                    |
|                                                                                      | <b>32</b> <b>Total net assets or fund balances</b> . . . . .                                                                                                                                                                   | 6,248,338                | <b>32</b>  | 8,657,096          |
| <b>33</b> <b>Total liabilities and net assets/fund balances</b> . . . . .            | 12,488,475                                                                                                                                                                                                                     | <b>33</b>                | 14,064,295 |                    |

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

|           |                                                                                                               |           |           |
|-----------|---------------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12)                                                     | <b>1</b>  | 9,427,670 |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)                                                      | <b>2</b>  | 7,018,912 |
| <b>3</b>  | Revenue less expenses Subtract line 2 from line 1                                                             | <b>3</b>  | 2,408,758 |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))                     | <b>4</b>  | 6,248,338 |
| <b>5</b>  | Net unrealized gains (losses) on investments                                                                  | <b>5</b>  |           |
| <b>6</b>  | Donated services and use of facilities                                                                        | <b>6</b>  |           |
| <b>7</b>  | Investment expenses                                                                                           | <b>7</b>  |           |
| <b>8</b>  | Prior period adjustments                                                                                      | <b>8</b>  |           |
| <b>9</b>  | Other changes in net assets or fund balances (explain in Schedule O)                                          | <b>9</b>  | 0         |
| <b>10</b> | Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | <b>10</b> | 8,657,096 |

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

|                                                                                                                                                                                                                                                                                                                                                                                                                                    | Yes | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1</b> Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O                                                                                                                                         |     |    |
| <b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant?<br>If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |     | No |
| <b>b</b> Were the organization's financial statements audited by an independent accountant?<br>If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both<br><input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                 | Yes |    |
| <b>c</b> If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?<br>If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O                                                                     | Yes |    |
| <b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?                                                                                                                                                                                                                                                                 |     | No |
| <b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits                                                                                                                                                                                                      |     |    |

# Additional Data

**Software ID:**  
**Software Version:**  
**EIN:** 54-2024246  
**Name:** NATIONAL OILHEAT RESEARCH ALLIANCE

Form 990 (2019)

**Form 990, Part III, Line 4a:**

RESEARCH, DEVELOPMENT, AND DEMONSTRATION IN 2019, THE ALLIANCE GRANTED OR EXPENDED \$1,878,182 FOR THE RESEARCH, DEVELOPMENT, AND DEMONSTRATION PROGRAM, INCLUDING \$1,324,156 IN GRANTS AND SPENDING OF PAST YEAR'S ASSESSMENTS REVENUE THE ALLIANCE ALSO BUDGETED \$1,650,000 IN ADDITIONAL NATIONAL SPENDING FROM 2019 ASSESSMENTS REVENUE TO BE SPENT SUBSEQUENT TO YEAR-END FOR THE RESEARCH, DEVELOPMENT, AND DEMONSTRATION PROGRAM, MAKING THE TOTAL FOR 2019, 30 PERCENT OF NET ASSESSMENTS REVENUE AFTER DEDUCTING THE AMOUNT ADDED TO NET ASSETS UNAVAILABLE FOR OBLIGATION UNTIL OCTOBER 1, 2028 ADDITIONALLY, UNALLOCATED STATE REBATES OF 2019 ASSESSMENTS REVENUE WILL BE USED FOR THE RESEARCH, DEVELOPMENT, AND DEMONSTRATION PROGRAM THE PUBLIC LAWS 113-79 AND 115-334 REQUIRE THE ALLIANCE SEE SCHEDULE O FOR CONTINUATION CONTINUED FROM PART III, LINE 4A TO ENSURE NOT LESS THAN 30 PERCENT OF THE ASSESSMENTS COLLECTED FOR EACH CALENDAR YEAR AFTER THE AMOUNTS REQUIRED TO BE ESCROWED AND NOT OBLIGATED UNTIL OCTOBER 1, 2028, UNDER PUBLIC LAW 115-334 ARE USED BY QUALIFIED STATE ASSOCIATIONS OR THE ALLIANCE TO CONDUCT RESEARCH, DEVELOPMENT, AND DEMONSTRATION ACTIVITIES RELATING TO OILHEAT FUEL, INCLUDING THE DEVELOPMENT OF ENERGY-EFFICIENT HEATING SYSTEMS TO BE PLACED INTO THE MARKETPLACE THIS ALSO INCLUDES THE ALLIANCE, IN CONJUNCTION WITH AN INSTITUTION OR ORGANIZATION ENGAGED IN BIOFUELS RESEARCH, TO DEVELOP CONSUMER EDUCATION MATERIALS DESCRIBING THE BENEFITS OF USING BIOFUELS AS OR IN OILHEAT FUEL BASED ON THE TECHNICAL INFORMATION DEVELOPED

**Form 990, Part III, Line 4b:**

HEATING OIL EFFICIENCY AND UPGRADE IN 2019, THE ALLIANCE GRANTED OR EXPENDED \$1,073,814 FOR THE HEATING OIL EFFICIENCY AND UPGRADE PROGRAM, INCLUDING \$46,803 IN GRANTS AND SPENDING OF PAST YEAR'S ASSESSMENTS REVENUE THE ALLIANCE ALSO BUDGETED \$75,000 IN ADDITIONAL NATIONAL SPENDING FROM 2019 ASSESSMENTS REVENUE TO BE SPENT SUBSEQUENT TO YEAR-END FOR THE HEATING OIL EFFICIENCY AND UPGRADE PROGRAM, MAKING THE TOTAL FOR 2019, 15 PERCENT OF NET ASSESSMENTS REVENUE AFTER DEDUCTING THE AMOUNT ADDED TO NET ASSETS UNAVAILABLE FOR OBLIGATION UNTIL OCTOBER 1, 2028 ADDITIONALLY, UNALLOCATED STATE REBATES OF 2019 ASSESSMENTS REVENUE WILL BE USED FOR THE HEATING OIL EFFICIENCY AND UPGRADE PROGRAM THE PUBLIC LAWS 113-79 AND 115-334 REQUIRE THE ALLIANCE TO ENSURE NOT LESS THAN 15 PERCENT SEE SCHEDULE O FOR CONTINUATION CONTINUED FROM PART III, LINE 4B OF THE ASSESSMENTS COLLECTED FOR EACH CALENDAR YEARAFTER THE AMOUNTS REQUIRED TO BE ESCROWED AND NOT OBLIGATED UNTIL OCTOBER 1, 2028, UNDER PUBLIC LAW 115-334 ARE USED BY QUALIFIED STATE ASSOCIATIONS OR THE ALLIANCE TO CARRY OUT PROGRAMS TO ASSIST CONSUMERS (I) TO MAKE COST-EFFECTIVE UPGRADES TO MORE FUEL EFFICIENT HEATING OIL SYSTEMS OR OTHERWISE MAKE COST-EFFECTIVE MODIFICATIONS TO AN EXISTING HEATING SYSTEM TO IMPROVE THE EFFICIENCY OF THE SYSTEM, (II) TO IMPROVE ENERGY EFFICIENCY OR REDUCE ENERGY CONSUMPTION THROUGH COST-EFFECTIVE ENERGY EFFICIENCY PROGRAMS FOR CONSUMERS, OR (III) TO IMPROVE THE SAFE OPERATION OF A HEATING SYSTEM

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**Form 990, Part III, Line 4c:**

CONSUMER EDUCATION, SAFETY, AND TRAINING IN 2019, THE ALLIANCE GRANTED OR EXPENDED \$2,045,567 FOR THE CONSUMER EDUCATION, SAFETY, AND TRAINING PROGRAM, INCLUDING \$11,457 IN GRANTS AND SPENDING OF PAST YEAR'S ASSESSMENTS REVENUE THE ALLIANCE ALSO BUDGETED \$270,000 IN ADDITIONAL NATIONAL SPENDING FROM 2019 ASSESSMENTS REVENUE FOR THE CONSUMER EDUCATION, SAFETY, AND TRAINING PROGRAM, OF WHICH \$73,223 REMAINED UNSPENT AS OF DECEMBER 31, 2019, MAKING THE TOTAL FOR 2019, 29 PERCENT OF NET ASSESSMENTS REVENUE AFTER DEDUCTING THE AMOUNT ADDED TO NET ASSETS UNAVAILABLE FOR OBLIGATION UNTIL OCTOBER 1, 2028 THE PUBLIC LAWS 113-79 AND 115-334 REQUIRE THE ALLIANCE TO ENSURE NOT MORE THAN 30 PERCENT OF THE ASSESSMENTS COLLECTED FOR EACH CALENDAR YEAR SEE SCHEDULE O FOR CONTINUATIONCONTINUED FROM PART III, LINE 4C AFTER THE AMOUNTS REQUIRED TO BE ESCROWED AND NOT OBLIGATED UNTIL OCTOBER 1, 2028, UNDER PUBLIC LAW 115-334 ARE USED (I) TO CONDUCT CONSUMER EDUCATION ACTIVITIES RELATING TO OILHEAT FUEL, INCLUDING PROVIDING INFORMATION TO CONSUMERS ON ENERGY CONSERVATION STRATEGIES, SAFETY, NEW TECHNOLOGIES THAT REDUCE CONSUMPTION OR IMPROVE SAFETY AND COMFORT, THE USE OF BIOFUEL BLENDS, AND FEDERAL, STATE, AND LOCAL PROGRAMS DESIGNED TO ASSIST OILHEAT FUEL CONSUMERS, (II) TO CONDUCT WORKER SAFETY AND TRAINING ACTIVITIES RELATING TO OILHEAT FUEL, INCLUDING ENERGY EFFICIENCY TRAINING, (III) TO CARRY OUT OTHER ACTIVITIES RECOMMENDED BY THE SECRETARY OF ENERGY, OR (IV) TO ESTABLISH A DATA COLLECTION PROCESS TO TRACK EQUIPMENT, SERVICE, AND RELATED SAFETY ISSUES TO DEVELOP MEASURES TO IMPROVE SAFETY

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| Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                       |                                                                            |                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-----------------------------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| (A)<br>Name and Title                                                                                                                         | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|                                                                                                                                               |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                       |                                                                            |                                                                                               |
| JOHN HUBER<br>.....<br>PRESIDENT                                                                                                              | 40 00<br>.....                                                                             | X                                                                                                         |                       | X       |              |                              |        | 290,000                                                               | 0                                                                          | 12,197                                                                                        |
| STEVE CLARK<br>.....<br>DIRECTOR                                                                                                              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| ERIC DEGESERO<br>.....<br>TREASURER                                                                                                           | 2 00<br>.....                                                                              | X                                                                                                         |                       | X       |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| MARIO BOUCHARD<br>.....<br>DIRECTOR                                                                                                           | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| ALLISON HEANEY<br>.....<br>DIRECTOR                                                                                                           | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| RANDY GROFT<br>.....<br>DIRECTOR                                                                                                              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| GREG CHILDS<br>.....<br>DIRECTOR                                                                                                              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| RICK BOLOGNA<br>.....<br>DIRECTOR                                                                                                             | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| CHRIS DALY<br>.....<br>DIRECTOR                                                                                                               | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| TED NOONAN<br>.....<br>DIRECTOR                                                                                                               | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |



| Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                       |                                                                            |                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-----------------------------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| (A)<br>Name and Title                                                                                                                         | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|                                                                                                                                               |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                       |                                                                            |                                                                                               |
| JAY BUEHLER<br>.....<br>DIRECTOR                                                                                                              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| JOE PHILLIPS<br>.....<br>DIRECTOR                                                                                                             | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| JOHN MCCUSKER<br>.....<br>DIRECTOR                                                                                                            | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| KEN RUSS<br>.....<br>DIRECTOR                                                                                                                 | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| LARRY GALGOCI<br>.....<br>DIRECTOR                                                                                                            | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| MATT MEEHAN<br>.....<br>DIRECTOR                                                                                                              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| MICHAEL JANUARIO<br>.....<br>DIRECTOR                                                                                                         | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| PETER AZIZ<br>.....<br>DIRECTOR                                                                                                               | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| QUINCY W LONGACRE<br>.....<br>DIRECTOR                                                                                                        | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| KIRK DARBY<br>.....<br>DIRECTOR                                                                                                               | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |

| Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                       |                                                                            |                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-----------------------------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| (A)<br>Name and Title                                                                                                                         | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|                                                                                                                                               |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                       |                                                                            |                                                                                               |
| STEPHEN SACK<br>.....<br>DIRECTOR                                                                                                             | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| STEVE MCCrackEN<br>.....<br>DIRECTOR                                                                                                          | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| SUSAN SANTOPIETRO<br>.....<br>DIRECTOR                                                                                                        | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| MICHAEL ESTES<br>.....<br>DIRECTOR                                                                                                            | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| TOM SANTA<br>.....<br>IMMEDIATE PAST CHAIRMAN                                                                                                 | 1 00<br>.....                                                                              | X                                                                                                         |                       | X       |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| PETER BOUTTE<br>.....<br>DIRECTOR                                                                                                             | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| SUSAN HAMMOND<br>.....<br>DIRECTOR                                                                                                            | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| JEFF LYKINS<br>.....<br>DIRECTOR                                                                                                              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| JOHN MILES<br>.....<br>DIRECTOR                                                                                                               | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| NATALIE MONDSINI<br>.....<br>DIRECTOR                                                                                                         | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |

**Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

| (A)<br>Name and Title                       | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-----------------------------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                             |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                       |                                                                            |                                                                                               |
| JOE KEENAN<br>.....<br>DIRECTOR             | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| WILL BERRY<br>.....<br>DIRECTOR             | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| JOE WILLS<br>.....<br>DIRECTOR              | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| SCOTT HACKER<br>.....<br>DIRECTOR           | 1 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| THOMAS BUTCHER<br>.....<br>RESEARCH MANAGER | 40 00<br>.....                                                                             |                                                                                                           |                       |         |              | X                            |        | 119,890                                                               | 0                                                                          | 8,854                                                                                         |

SCHEDULE D  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
► Attach to Form 990.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No 1545-0047

2019

Open to Public Inspection

Name of the organization  
NATIONAL OILHEAT RESEARCH ALLIANCE

Employer identification number  
54-2024246

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

|                                                     | (a) Donor advised funds | (b) Funds and other accounts |
|-----------------------------------------------------|-------------------------|------------------------------|
| 1 Total number at end of year                       |                         |                              |
| 2 Aggregate value of contributions to (during year) |                         |                              |
| 3 Aggregate value of grants from (during year)      |                         |                              |
| 4 Aggregate value at end of year                    |                         |                              |

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?

☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?

☐ Yes ☐ No

Part II Conservation Easements.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or education)

☐ Preservation of an historically important land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

|                                                                                                                                            | Held at the End of the Year |
|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| a Total number of conservation easements                                                                                                   | 2a                          |
| b Total acreage restricted by conservation easements                                                                                       | 2b                          |
| c Number of conservation easements on a certified historic structure included in (a)                                                       | 2c                          |
| d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register | 2d                          |

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ►

4 Number of states where property subject to conservation easement is located ►

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ►

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ► \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenue included on Form 990, Part VIII, line 1

► \$

(ii) Assets included in Form 990, Part X

► \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenue included on Form 990, Part VIII, line 1

► \$

b Assets included in Form 990, Part X

► \$

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐ Public exhibition

d

☐ Loan or exchange programs

b

☐ Scholarly research

e

☐ Other

c

☐ Preservation for future generations

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIII and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

|    | Amount |
|----|--------|
| 1c |        |
| 1d |        |
| 1e |        |
| 1f |        |

2a

Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . .

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII . . . .

☐

Part V

Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

|    | (a) Current year                                         | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|----|----------------------------------------------------------|----------------|--------------------|----------------------|---------------------|
| 1a | Beginning of year balance . . . . .                      | 5,605,564      |                    |                      |                     |
| b  | Contributions . . . . .                                  | 3,774,971      |                    |                      |                     |
| c  | Net investment earnings, gains, and losses               | 1,002          |                    |                      |                     |
| d  | Grants or scholarships . . . . .                         |                |                    |                      |                     |
| e  | Other expenditures for facilities and programs . . . . . | 1,767,888      |                    |                      |                     |
| f  | Administrative expenses . . . . .                        |                |                    |                      |                     |
| g  | End of year balance . . . . .                            | 7,613,649      |                    |                      |                     |

2

Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

a

Board designated or quasi-endowment ▶ 100 000 %

b

Permanent endowment ▶

c

Temporarily restricted endowment ▶

The percentages on lines 2a, 2b, and 2c should equal 100%

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i) unrelated organizations . . . . .

(ii) related organizations . . . . .

|        | Yes | No |
|--------|-----|----|
| 3a(i)  |     | No |
| 3a(ii) |     | No |
| 3b     |     |    |

b

If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . .

4

Describe in Part XIII the intended uses of the organization's endowment funds

Part VI

Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property | (a) Cost or other basis (investment)                                                              | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|-------------------------|---------------------------------------------------------------------------------------------------|---------------------------------|------------------------------|----------------|
| 1a                      | Land . . . . .                                                                                    |                                 |                              |                |
| b                       | Buildings . . . . .                                                                               |                                 |                              |                |
| c                       | Leasehold improvements                                                                            |                                 |                              |                |
| d                       | Equipment . . . . .                                                                               | 82,656                          | 71,442                       | 11,214         |
| e                       | Other . . . . .                                                                                   | 45,450                          | 45,450                       | 0              |
| Total.                  | Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c) ) . . . ▶ |                                 |                              | 11,214         |

Part VII

Investments—Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

| (a) Description of security or category<br>(including name of security) | (b) Book value | (c) Method of valuation<br>Cost or end-of-year market value |
|-------------------------------------------------------------------------|----------------|-------------------------------------------------------------|
| (1) Financial derivatives . . . . .                                     |                |                                                             |
| (2) Closely-held equity interests . . . . .                             |                |                                                             |
| (3) Other _____                                                         |                |                                                             |
| (A)                                                                     |                |                                                             |
| (B)                                                                     |                |                                                             |
| (C)                                                                     |                |                                                             |
| (D)                                                                     |                |                                                             |
| (E)                                                                     |                |                                                             |
| (F)                                                                     |                |                                                             |
| (G)                                                                     |                |                                                             |
| (H)                                                                     |                |                                                             |
| Total. (Column (b) must equal Form 990, Part X, col (B) line 12 ) ▶     |                |                                                             |

Part VIII

Investments—Program Related.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

| (a) Description of investment                                       | (b) Book value | (c) Method of valuation<br>Cost or end-of-year market value |
|---------------------------------------------------------------------|----------------|-------------------------------------------------------------|
| (1)                                                                 |                |                                                             |
| (2)                                                                 |                |                                                             |
| (3)                                                                 |                |                                                             |
| (4)                                                                 |                |                                                             |
| (5)                                                                 |                |                                                             |
| (6)                                                                 |                |                                                             |
| (7)                                                                 |                |                                                             |
| (8)                                                                 |                |                                                             |
| (9)                                                                 |                |                                                             |
| Total. (Column (b) must equal Form 990, Part X, col (B) line 13 ) ▶ |                |                                                             |

Part IX

Other Assets.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15

| (a) Description                                                               | (b) Book value |
|-------------------------------------------------------------------------------|----------------|
| (1)                                                                           |                |
| (2)                                                                           |                |
| (3)                                                                           |                |
| (4)                                                                           |                |
| (5)                                                                           |                |
| (6)                                                                           |                |
| (7)                                                                           |                |
| (8)                                                                           |                |
| (9)                                                                           |                |
| Total. (Column (b) must equal Form 990, Part X, col (B) line 15 ) . . . . . ▶ |                |

Part X

Other Liabilities.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

| 1. (a) Description of liability                                     | (b) Book value |
|---------------------------------------------------------------------|----------------|
| (1) Federal income taxes                                            |                |
| (2)                                                                 |                |
| (3)                                                                 |                |
| (4)                                                                 |                |
| (5)                                                                 |                |
| (6)                                                                 |                |
| (7)                                                                 |                |
| (8)                                                                 |                |
| (9)                                                                 |                |
| Total. (Column (b) must equal Form 990, Part X, col (B) line 25 ) ▶ |                |

2. Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☒

Schedule D (Form 990) 2019

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

|          |                                                                                                          |           |           |
|----------|----------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b> | Total revenue, gains, and other support per audited financial statements . . . . .                       | <b>1</b>  | 9,427,670 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part VIII, line 12                                       |           |           |
| <b>a</b> | Net unrealized gains (losses) on investments . . . . .                                                   | <b>2a</b> |           |
| <b>b</b> | Donated services and use of facilities . . . . .                                                         | <b>2b</b> |           |
| <b>c</b> | Recoveries of prior year grants . . . . .                                                                | <b>2c</b> |           |
| <b>d</b> | Other (Describe in Part XIII ) . . . . .                                                                 | <b>2d</b> |           |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .                                                          | <b>2e</b> | 0         |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .                                                     | <b>3</b>  | 9,427,670 |
| <b>4</b> | Amounts included on Form 990, Part VIII, line 12, but not on line <b>1</b>                               |           |           |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                               | <b>4a</b> |           |
| <b>b</b> | Other (Describe in Part XIII ) . . . . .                                                                 | <b>4b</b> |           |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .                                                              | <b>4c</b> | 0         |
| <b>5</b> | Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12 ) . . . . . | <b>5</b>  | 9,427,670 |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

|          |                                                                                                           |           |           |
|----------|-----------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b> | Total expenses and losses per audited financial statements . . . . .                                      | <b>1</b>  | 7,018,912 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part IX, line 25                                          |           |           |
| <b>a</b> | Donated services and use of facilities . . . . .                                                          | <b>2a</b> |           |
| <b>b</b> | Prior year adjustments . . . . .                                                                          | <b>2b</b> |           |
| <b>c</b> | Other losses . . . . .                                                                                    | <b>2c</b> |           |
| <b>d</b> | Other (Describe in Part XIII ) . . . . .                                                                  | <b>2d</b> |           |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .                                                           | <b>2e</b> | 0         |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .                                                      | <b>3</b>  | 7,018,912 |
| <b>4</b> | Amounts included on Form 990, Part IX, line 25, but not on line <b>1</b> :                                |           |           |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                                | <b>4a</b> |           |
| <b>b</b> | Other (Describe in Part XIII ) . . . . .                                                                  | <b>4b</b> |           |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .                                                               | <b>4c</b> | 0         |
| <b>5</b> | Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18 ) . . . . . | <b>5</b>  | 7,018,912 |

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

| Return Reference          | Explanation |
|---------------------------|-------------|
| See Additional Data Table |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |

**Part XIII** Supplemental Information *(continued)*

| Return Reference | Explanation |
|------------------|-------------|
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## Additional Data

**Software ID:**  
**Software Version:**  
**EIN:** 54-2024246  
**Name:** NATIONAL OILHEAT RESEARCH ALLIANCE

## Supplemental Information

| Return Reference | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PART V, LINE 4   | THE ALLIANCE HAS THE FOLLOWING BOARD DESIGNATED NET ASSETS PRE-2014 REAUTHORIZATION DESIGNATED NET ASSETS ONCE PUBLIC LAW 113-79 BECAME EFFECTIVE APRIL 1, 2014, THE ALLIANCE DESIGNATED THE REMAINING NET ASSETS UNDER THE FORMER PUBLIC LAW 106-469 FOR USE IN A NATIONAL OILHEAT EDUCATION PROGRAM AS OF DECEMBER 31, 2019, \$55,933 REMAINED UNSPENT AND ARE DESIGNATED FOR FUTURE USE NATIONAL SPENDING NOT YET INCURRED DESIGNATED NET ASSETS THE ALLIANCE BUDGETS NATIONAL SPENDING IN THE ACCOMPLISHMENT OF ITS MISSION UNDER PUBLIC LAWS 113-79 AND 115-334 THE ALLIANCE RECORDED \$5,776,743 IN NATIONAL SPENDING OF ASSESSMENTS REVENUE , WHICH HAD NOT YET BEEN INCURRED AS OF DECEMBER 31, 2019 THE ALLIANCE HAS DESIGNATED NET ASSETS IN THESE AMOUNTS FOR FUTURE PROGRAM SPENDING, SOME OF WHICH, THE ALLIANCE HAS APPROVED CONTRACTS TO EXPEND NET ASSETS UNAVAILABLE FOR OBLIGATION UNTIL OCTOBER 1, 2028 PUBLIC LAW 115-334 ESTABLISHED A REQUIREMENT THAT FUNDS BE MAINTAINED IN ESCROW UNTIL OCTOBER 1, 2028 NET ASSETS UNAVAILABLE FOR OBLIGATION UNTIL OCTOBER 1, 2028, IS AN ACCUMULATION OF THESE NET ASSETS PLUS INTEREST AND WAS \$1,780,973 |

## Supplemental Information

| Return Reference | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PART X, LINE 2   | THE ALLIANCE IS REQUIRED TO MEASURE, RECOGNIZE, PRESENT, AND DISCLOSE IN ITS FINANCIAL STATEMENTS UNCERTAIN INCOME TAX POSITIONS THE ALLIANCE HAS TAKEN IN THE TAX YEARS THAT REMAIN SUBJECT TO EXAMINATION OR EXPECTS TO TAKE ON AN INCOME TAX RETURN THE ALLIANCE RECOGNIZES THE TAX BENEFITS FROM UNCERTAIN INCOME TAX POSITIONS ONLY IF IT IS MORE LIKELY THAN NOT THE TAX POSITION WILL BE SUSTAINED ON EXAMINATION BY TAX AUTHORITIES THE ALLIANCE RECORDED NO LIABILITY FOR UNCERTAIN INCOME TAX POSITIONS FOR ANY OPEN TAX YEARS |

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule I  
(Form 990)

Grants and Other Assistance to Organizations,  
Governments and Individuals in the United States  
Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2019

Open to Public  
Inspection

Department of the  
Treasury  
Internal Revenue Service

Name of the organization  
NATIONAL OILHEAT RESEARCH ALLIANCE

Employer identification number

54-2024246

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed

| (a) Name and address of organization or government | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
|----------------------------------------------------|---------|---------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|---------------------------------------|------------------------------------|
| (1) See Additional Data                            |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (2)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (3)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (4)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (5)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (6)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (7)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (8)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (9)                                                |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (10)                                               |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (11)                                               |         |                                 |                          |                                   |                                                       |                                       |                                    |
| (12)                                               |         |                                 |                          |                                   |                                                       |                                       |                                    |

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . . 0

3 Enter total number of other organizations listed in the line 1 table . . . . . 22

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22

Part III can be duplicated if additional space is needed

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of noncash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------|--------------------------|--------------------------|----------------------------------|-------------------------------------------------------|---------------------------------------|
| (1)                             |                          |                          |                                  |                                                       |                                       |
| (2)                             |                          |                          |                                  |                                                       |                                       |
| (3)                             |                          |                          |                                  |                                                       |                                       |
| (4)                             |                          |                          |                                  |                                                       |                                       |
| (5)                             |                          |                          |                                  |                                                       |                                       |
| (6)                             |                          |                          |                                  |                                                       |                                       |
| (7)                             |                          |                          |                                  |                                                       |                                       |

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

| Return Reference | Explanation                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PART I, LINE 2   | GRANTEES SUBMIT AN ONLINE REQUEST FOR PAYMENT DIRECTLY TO THE THIRD PARTY VENDORS USED TO CONDUCT THE GRANT ACTIVITIES. THE ONLINE REQUEST INCLUDES A DESCRIPTION, INDICATION, AND CERTIFICATION OF HOW THE GRANT REBATE FULFILLS THE REQUIREMENTS OF THE NORA PUBLIC LAW PRIOR TO PAYMENT, NORA MANAGEMENT REVIEWS THE REQUEST, ASK QUESTIONS AS APPROPRIATE, AND THEN APPROVES THE REQUEST, IF APPROPRIATE |

Additional Data

Software ID:  
Software Version:  
EIN: 54-2024246  
Name: NATIONAL OILHEAT RESEARCH ALLIANCE

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

| (a) Name and address of organization or government                                       | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
|------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| CONNECTICUT ENERGY MARKETERS ASSOCIATION<br>10 ALCAP RIDGE<br>CROMWELL, CT 06416         |         | 501(C)(6)                     | 519,259                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| MID-ATLANTIC PETROLEUM DISTRIBUTORS ASSOCIATION INC<br>PO BOX 711<br>ANNAPOLIS, MD 21404 |         | 501(C)(6)                     | 201,043                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| INDIANA FOOD & FUEL ASSOCIATION<br>600 EAST 96TH STREET SUITE 585<br>INDIANAPOLIS, IN 46240                    |         | 501(C)(6)                     | 7,051                    |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| KENTUCKY PETROLEUM MARKETERS ASSOCIATION<br>2365 HARRODSBURG ROAD SUITE A325<br>LEXINGTON, KY 40504            |         | 501(C)(6)                     | 48,350                   |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| MASSACHUSETTS ENERGY MARKETERS ASSOCIATION<br>ONE VAN DE GRAAFF DRIVE<br>SUITE 100<br>BURLINGTON, MA 01803     |         | 501(C)(6)                     | 572,141                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| MAINE ENERGY MARKETERS ASSOCIATION<br>25 GREENWOOD ROAD<br>BRUNSWICK, ME 04011                                 |         | 501(C)(6)                     | 333,413                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| MICHIGAN PETROLEUM ASSOCIATION<br>7521 WESTSHIRE DRIVE<br>SUITE 200<br>LANSING, MI 48917                       |         | 501(C)(6)                     | 118,860                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| ENERGY MARKETERS ASSOCIATION OF NEW HAMPSHIRE INC<br>19 HENNIKER ST<br>CONCORD, NH 033023898                   |         | 501(C)(6)                     | 222,108                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| FUEL MERCHANTS ASSOCIATION OF NEW JERSEY<br>21 COMMERCE DRIVE SUITE 202<br>CRANFORD, NJ 07016                  |         | 501(C)(6)                     | 414,500                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| NEW YORK OIL HEATING ASSOCIATION INC<br>200 PARKWAY DRIVE S STE 202<br>HAUPPAUGE, NY 11788                     |         | 501(C)(6)                     | 298,569                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| UPSTATE NEW YORK ENERGY ASSOCIATION<br>250 JORDAN ROAD<br>TROY, NY 12180                                       |         | 501(C)(6)                     | 235,191                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| NORTH CAROLINA PETROLEUM & CONVENIENCE MARKETERS ASSOCIATION<br>7300 GLENWOOD AVENUE<br>RALEIGH, NC 27612      |         | 501(C)(6)                     | 165,196                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| HUDSON VALLEY OIL & ENERGY COUNCIL<br>PO BOX 692<br>RHINEBECK, NY 12572                                        |         | 501(C)(6)                     | 136,842                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| OIL HEAT INSTITUTE OF LONG ISLAND<br>200 PARKWAY DRIVE S STE 202<br>HAUPPAUGE, NY 11788                        |         | 501(C)(6)                     | 259,493                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| OHIO OILHEAT COUNCIL<br>17 S HIGH STREET SUITE 810<br>COLUMBUS, OH 43215                                       |         | 501(C)(6)                     | 111,809                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| PENNSYLVANIA PETROLEUM ASSOCIATION<br>911B SOUTH EISENHOWER BOULEVARD<br>MIDDLETOWN, PA 170575504              |         | 501(C)(6)                     | 748,921                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments. |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|----------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                             | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| OIL HEAT INSTITUTE OF RHODE ISLAND<br>55 JOHN CLARKE ROAD UNIT A24<br>MIDDLETOWN, RI 02842                     |         | 501(C)(6)                     | 167,210                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| SOUTH CAROLINA PETROLEUM MARKETERS ASSOCIATION<br>1809 GADSDEN STREET<br>COLUMBIA, SC 29201                    |         | 501(C)(6)                     | 65,474                   |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.      |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|---------------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                                  | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| VERMONT FUEL DEALERS ASSOCIATION<br>963 PAINE TURNPIKE NORTH<br>BERLIN, VT 05602                                    |         | 501(C)(6)                     | 117,349                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| VIRGINIA PETROLEUM & CONVENIENCE MARKETERS ASSOCIATION<br>7275 GLEN FOREST DRIVE<br>SUITE 204<br>RICHMOND, VA 23226 |         | 501(C)(6)                     | 153,612                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

| Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.          |         |                               |                          |                                   |                                                       |                                        |                                                                 |
|-------------------------------------------------------------------------------------------------------------------------|---------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------------------------|
| (a) Name and address of organization or government                                                                      | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                              |
| WASHINGTON OIL MARKETERS ASSOCIATION<br>9390 ORCHARD AVE SE<br>PORT ORCHARD, WA 98367                                   |         | 501(C)(6)                     | 23,671                   |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |
| WISCONSIN PETROLEUM MARKETERS & CONVENIENCE STORE ASSOCIATION<br>122 W WASHINGTON AVE<br>SUITE 101<br>MADISON, WI 53703 |         | 501(C)(6)                     | 114,328                  |                                   |                                                       |                                        | RESEARCH & DEVELOPMENT, ENERGY EFFICIENCY, EDUCATION & TRAINING |

|                          |                                                                                                                                                                                                                                                                                                                                                                                           |                           |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| Schedule J<br>(Form 990) | <div>Compensation Information</div> <div>For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees</div> <div>▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.<br/>▶ Attach to Form 990.</div> <div>▶ Go to <a href="http://www.irs.gov/Form990">www.irs.gov/Form990</a> for instructions and the latest information.</div> | OMB No 1545-0047          |
|                          |                                                                                                                                                                                                                                                                                                                                                                                           | 2019                      |
|                          |                                                                                                                                                                                                                                                                                                                                                                                           | Open to Public Inspection |

|                                                        |                                                                |                                              |
|--------------------------------------------------------|----------------------------------------------------------------|----------------------------------------------|
| Department of the Treasury<br>Internal Revenue Service | Name of the organization<br>NATIONAL OILHEAT RESEARCH ALLIANCE | Employer identification number<br>54-2024246 |
|--------------------------------------------------------|----------------------------------------------------------------|----------------------------------------------|

| Part I Questions Regarding Compensation                                                                                                                                                                                                                                                                                              |                                                                                     | Yes | No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-----|----|
| <b>1a</b> Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.                                                                                          |                                                                                     |     |    |
| <input type="checkbox"/> First-class or charter travel                                                                                                                                                                                                                                                                               | <input type="checkbox"/> Housing allowance or residence for personal use            |     |    |
| <input type="checkbox"/> Travel for companions                                                                                                                                                                                                                                                                                       | <input type="checkbox"/> Payments for business use of personal residence            |     |    |
| <input type="checkbox"/> Tax indemnification and gross-up payments                                                                                                                                                                                                                                                                   | <input type="checkbox"/> Health or social club dues or initiation fees              |     |    |
| <input type="checkbox"/> Discretionary spending account                                                                                                                                                                                                                                                                              | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)            |     |    |
| <b>b</b> If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.                                                                                                     |                                                                                     | 1b  |    |
| <b>2</b> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?                                                                                                          |                                                                                     | 2   |    |
| <b>3</b> Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III. |                                                                                     |     |    |
| <input checked="" type="checkbox"/> Compensation committee                                                                                                                                                                                                                                                                           | <input type="checkbox"/> Written employment contract                                |     |    |
| <input type="checkbox"/> Independent compensation consultant                                                                                                                                                                                                                                                                         | <input type="checkbox"/> Compensation survey or study                               |     |    |
| <input type="checkbox"/> Form 990 of other organizations                                                                                                                                                                                                                                                                             | <input checked="" type="checkbox"/> Approval by the board or compensation committee |     |    |
| <b>4</b> During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:                                                                                                                                                                        |                                                                                     |     |    |
| <b>a</b> Receive a severance payment or change-of-control payment?                                                                                                                                                                                                                                                                   |                                                                                     | 4a  | No |
| <b>b</b> Participate in, or receive payment from, a supplemental nonqualified retirement plan?                                                                                                                                                                                                                                       |                                                                                     | 4b  | No |
| <b>c</b> Participate in, or receive payment from, an equity-based compensation arrangement?                                                                                                                                                                                                                                          |                                                                                     | 4c  | No |
| If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.                                                                                                                                                                                                                        |                                                                                     |     |    |
| <b>Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.</b>                                                                                                                                                                                                                                              |                                                                                     |     |    |
| <b>5</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:                                                                                                                                                                            |                                                                                     |     |    |
| <b>a</b> The organization?                                                                                                                                                                                                                                                                                                           |                                                                                     | 5a  |    |
| <b>b</b> Any related organization?                                                                                                                                                                                                                                                                                                   |                                                                                     | 5b  |    |
| If "Yes," on line 5a or 5b, describe in Part III.                                                                                                                                                                                                                                                                                    |                                                                                     |     |    |
| <b>6</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:                                                                                                                                                                        |                                                                                     |     |    |
| <b>a</b> The organization?                                                                                                                                                                                                                                                                                                           |                                                                                     | 6a  |    |
| <b>b</b> Any related organization?                                                                                                                                                                                                                                                                                                   |                                                                                     | 6b  |    |
| If "Yes," on line 6a or 6b, describe in Part III.                                                                                                                                                                                                                                                                                    |                                                                                     |     |    |
| <b>7</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III.                                                                                                                                            |                                                                                     | 7   |    |
| <b>8</b> Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.                                                                                                |                                                                                     | 8   |    |
| <b>9</b> If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?                                                                                                                                                                                    |                                                                                     | 9   |    |

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

[illegible]

**Part III**   **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

| Return Reference | Explanation |
|------------------|-------------|
|------------------|-------------|

**SCHEDULE O**  
(Form 990 or 990-EZ)

Department of the Treasury

Name of the organization

NATIONAL OILHEAT RESEARCH ALLIANCE

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2019**

**Open to Public Inspection**

**Employer identification number**

54-2024246

**990 Schedule O, Supplemental Information**

| Return Reference                     | Explanation                                                                                                                                                                                                                                                                                                       |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FORM 990, PART VI, SECTION A, LINE 6 | THE ALLIANCE IS COMPOSED OF MEMBERS FROM (1) STATES WITH OILHEAT SALES IN EXCESS OF 32 MIL LION GALLONS PER YEAR OR AT LEAST 22 STATES AND DISTRICTS, (2) RETAIL MARKETERS OF OILHEAT SALES, (3) WHOLESALE DISTRIBUTORS OF OILHEAT, AND (4) THE GENERAL PUBLIC NEW MEMBERS ARE APPROVED BY THE BOARD OF DIRECTORS |

**990 Schedule O, Supplemental Information**

| Return<br>Reference                             | Explanation                                                                                                                   |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| FORM 990,<br>PART VI,<br>SECTION B,<br>LINE 11B | FORM 990 IS REVIEWED BY THE EXECUTIVE DIRECTOR PRIOR TO FILING IT IS NOT PROVIDED TO THE BOARD OF DIRECTORS PRIOR TO ISSUANCE |

**990 Schedule O, Supplemental Information**

| Return<br>Reference                             | Explanation                                                                                                                                                                                                 |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FORM 990,<br>PART VI,<br>SECTION B,<br>LINE 12C | THE ALLIANCE ENGAGES A CPA FIRM TO REVIEW AND PROCESS ALL PAYABLE TRANSACTIONS FOR ANY POTENTIAL CONFLICTS OF INTEREST THE EXECUTIVE DIRECTOR ALSO MONITORS COMPLIANCE WITH THE CONFLICT OF INTEREST POLICY |

**990 Schedule O, Supplemental Information**

| Return<br>Reference                             | Explanation                                                                     |
|-------------------------------------------------|---------------------------------------------------------------------------------|
| FORM 990,<br>PART VI,<br>SECTION B,<br>LINE 15A | COMPENSATION IS DETERMINED BY THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS |

# 990 Schedule O, Supplemental Information

| Return<br>Reference                            | Explanation                                                                                        |
|------------------------------------------------|----------------------------------------------------------------------------------------------------|
| FORM 990,<br>PART VI,<br>SECTION C,<br>LINE 19 | THE ALLIANCE'S DOCUMENTS ARE AVAILABLE TO THE PUBLIC ON IT'S WEBSITE OR BY CONTACTING THE ALLIANCE |

990 Schedule O, Supplemental Information

| Return<br>Reference               | Explanation                                                                          |
|-----------------------------------|--------------------------------------------------------------------------------------|
| FORM 990,<br>PART IX,<br>LINE 11G | RESEARCH CONTRACTORS 612,562 EDUCATION AND TRAINING 122,359 OTHER CONSULTANTS 16,566 |