When House Bill 278 went into effect in 2004, the Ohio Oil and Gas Association resolved what many thought were the outstanding local control issues between the industry and local jurisdictions. Since then, however, there is a nationally based, strongly organized, and well-funded effort to challenge that very issue. Other states around the country do not have the same type of rules and regulations that Ohio has, allowing efforts like these to make some headway. New York, Pennsylvania, and Colorado have all faced challenges and in some cases, lost state regulating authority. Now, some folks are trying to run that same play here in Ohio.

The list below is a current count of the communities in Ohio (some in active oil and gas territory and some not) that have tried to circumvent state law by following the lead of the anti-development movement in other states by passing some type of ban or restriction on oil and gas development.

**Yellow Springs**

In Ohio, it all started here. First, there was the ban on hydraulic fracturing and injection wells in Yellow Springs. A majority of City Council members voted in favor of a local ban, a proposal brought by a group of residents. The ban states that the municipality has the authority to outlaw the practices of the oil and gas industry within municipal borders, a stance that runs counter to Ohio Revised Code Section 1509.02 which gives all such regulatory authority to the Ohio Department of Natural Resources. Council Law Director John Chambers had recommended that the Council not support the ban, but the members of council passed the ordinance.

**Broadview Heights**

Next a ban was put forward by the members of a group called “Mothers Against Drilling In Our Neighborhoods” to the members of Broadview Heights City Council. This proposal stated that no one is allowed to drill or use hydraulic fracturing within city limits. Council ended up passing the measure. More recently, the council has hired an attorney out of New York City who works for the National Resources Defense Council to coordinate efforts with the City of Munroe Falls on their appeal to the Ohio Supreme Court regarding local control issues.

**Mansfield**

The first to the ballot was the City of Mansfield’s “Bill of Rights”. Voters passed the measure to say “no” to injection wells within city limits. The issue was brought forward by the Mansfield Law Director during the charter review process. He made several proposals during the charter review process that included raising his term from 4 years to 6 years and abolishing his office’s term limits.

**Medina**

Following the lead of other towns, some citizens wanted to ban development within Medina city limits and took their idea to city council. After two council meetings and several presentations by both sides of the issue, the city council did not bite and did not take any action realizing that oil and gas development is good for region and for Ohio. This was a big victory for the industry showing that when education and fear go toe-to-toe, education wins.

**Brunswick**

The anti-development crowd, still licking their wounds from the last battle, took their message to the City of Brunswick. The city council voted 6-1 in favor of a ban within city limits. The industry even took time to take members of city council on a rig tour.
ENERGY LITIGATION. CHECK OR CHECKMATE?

You need a litigation team that anticipates all the right moves in the local courts of the Marcellus and Utica shale plays. Our energy attorneys have focused practices in shale gas lease, land use, toxic tort, environmental and construction litigation.

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President’s Comments

Moving day has finally arrived and our Association staff reunited on the 14th floor of the Key Bank Building in downtown Columbus. The decision to move from Granville was deliberative. First, we opened a small legislative office to be near the policymakers and regulators who can impact our businesses most. Then we considered expanding and remodeling our shared office building in Granville to accommodate the needs of both OOGA and OOGEEP. During the evaluation process, your Association leadership was ever mindful of several legacy producers and their wisdom in providing a debt free building in 1982 to conduct our affairs. They understood the value of rent free space during the lean times that would likely return in our cyclical business.

The decision to move has been made three times in our history. The initial office in 1947 was rented space in Downtown Newark. The Association then moved in the mid 1950’s to a Newark building established solely for OOGA offices. The Ohio oil and gas industry experienced a resurgence that began in the in the late 70’s which propelled the state rotary rig count to over 100 with 5,000 new wells drilled. Kirk Jordan, who served in Tom Stewart’s capacity from 1963 to 1991 recently commented that “the industry was enlarging at that time and we needed more space. We had done work on the Newark building, but it wasn’t enough. We needed the infrastructure to effectively serve our members”. Under the leadership of President Berman Shafer, the decision to acquire land and build was made and President Cy Morgan held a building dedication in July, 1982.

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Industry Update: Indiana Bat Summer Surveys and Water Resources

By: Ryan Elliott, Vorys, Sater, Seymour and Pease LLP

Indiana Bat Summer Surveys: The 2013 Indiana Bat Summer Survey season has come to a close and, suffice it to say, this season left many of the Association’s members scratching their heads. As an initial matter, the U.S. Fish and Wildlife Service (USFWS) issued a revised Draft Indiana Bat Summer Survey Guidelines document just before the start of the 2013 survey season, leaving little time to review, understand, and implement the new guidelines. One of the more significant revisions to the 2013 Draft Guidelines was that the USFWS authorized the use of acoustic surveys for determining the presence or absence of Indiana Bats. However, the Ohio Department of Natural Resources was still requiring use of the 2007 USFWS Draft Guidelines, which does not allow acoustic surveys.

Ohio’s adherence to the 2007 Draft Guidelines was not the only source of confusion during the 2013 survey season. Unbeknownst to many of those subject to Indiana Bat summer survey requirements in Ohio, Ohio’s summer survey season was apparently shortened in 2010 to run from June 15 through July 31, not May 15 through August 15 as prescribed in the 2007 and 2013 USFWS Draft Guidelines. This detail became known only after a May 9, 2013 email from the Ohio Department of Natural Resources (ODNR) - Division of Wildlife to a group of bat biologists, “reminding” the biologists of Ohio’s shortened summer survey season, was forwarded to members of the Association.

In light of the challenges experienced during the 2013 Indiana Bat summer survey season, the Association has engaged ODNR to consider revising its summer survey policy. ODNR is currently reviewing mist netting data and has stated that it plans to meet with stakeholders and biologists to discuss whether Ohio’s summer survey period should be extended, among other possible changes.

Water Resources: Access to convenient sources of water is critical to our members’ businesses which is why the Water Resources Workgroup is pleased to inform our members of a potential abundant source of water – the lakes and reservoirs under the jurisdiction of the Muskingum Watershed Conservancy District (MWCD). A recent U.S. Geological Survey (USGS) analysis of potential water availability from the Atwood, Leesville, and Tappan Lakes within the MWCD indicates that the lakes could serve as a viable source of water during certain months.

Continued on page 6
Paying it Forward: OOGA Hosts Illinois Delegation

By: Penny Seipel, Vice President of Public Affairs

Oil and gas opportunities are cropping up in more and more states. As a trade association, we always want to promote relationships and exchange knowledge with other organizations and states. When Ohio was on the cusp of shale development, the oil and gas industry, as well as state and local officials, took steps to educate themselves on what to expect by visiting other states that had already begun experiencing the phenomenon. With expectations high for Illinois’ New Albany shale, the Ohio Oil and Gas Association had an opportunity to pay those lessons forward. We were honored to host Brad Richards from the Illinois Oil and Gas Association as well as a delegation of state, local government and business officials from the Land of Lincoln.

Over the course of two days in late July, OOGA with the assistance of many others, introduced our Illinois guests to various individuals from across southeastern Ohio. Amy Rutledge, Director of both the Carroll County Chamber of Commerce and the Carroll County Convention and Visitors Bureau, was instrumental in coordinating conversations with individuals from Carroll County—ground zero for Utica Shale activity. Those conversations included representatives from the county engineer’s office, county sheriff, county commissioners and local business owners. We also had folks from Harrison County, Belmont County and the Village of Cadiz Community Improvement Corporation. To round out the trip, our guests were able to visit the MarkWest processing facility and a PDC rig site, as well as a producing well.

All in all, the Illinois participants were able to have candid conversations with people experiencing the real effects of shale development instead of hyperbole and misinformation. The reaction from our guests was gratitude for being able to have honest conversations with the possibility for future dialog directly with our presenters.

One week following the two-day tour, Tom Stewart, Executive Vice President of OOGA, was invited to participate in a panel before a wider audience in Illinois. While we have already learned much from our limited experience with shale development here in Ohio, we still have much to learn and will be able to do that through the generosity of other regions willing to help us through the process.

Industry Update: Indiana Bat Summer Surveys and Water Resources (cont. from pg. 5)

The MWCD commissioned the USGS to conduct a similar study on Seneca, Piedmont, and Clendening lakes. This report is expected to be published in July 2014.

The Association’s Water Resources Workgroup has engaged the MWCD regarding the possible use of its lakes and reservoirs as a source of water for oil and gas exploration and production operations. Based on recent discussions with industry stakeholders and the MWCD, the Water Resources Workgroup has learned that the MWCD (1) does not want to be in the water distribution business, (2) has concerns with respect to opening its water sources for use by the oil and gas industry including increased truck traffic and public perception, and (3) is hesitant to address some of the more complicated practical and legal issues associated with being a substantial provider or distributor of water for the industry. However, the possibility of forming an industry co-op of operators was an option discussed; such co-op entity could potentially be created under the Association’s umbrella and would contract for the long-term supply of water from the MWCD. This could be a significant step forward as the only other long-term water sale contract held by the MWCD has entered into with the Village of Cadiz for its municipal water supply.

The Association will continue to monitor these issues and keep you informed of any new developments regarding Indiana Bat summer surveys and water resources.
Anti-Development Groups Push Communities Toward Oil & Gas Bans (cont. from cover)

**Youngstown**
In Youngstown some folks gathered signatures to place a ban on oil and gas development, hydraulic fracturing, pipelines, making of pipe, and the hauling of waste on the ballot. When this issue was put to a vote, the citizens of Youngstown decided that oil and gas development was helping to bring their – knocked down but not out – town back to life. The issue was defeated by a margin of 57% to 43%. Now the group has gathered signatures to put the issue on the ballot again.

**Oberlin**
A petition signed by 455 residents was approved by the city and is headed to the ballot indicating that the Community Bill of Rights would “ban the extraction of gas and oil, along with associated activities, including the disposal of associated wastes, into injection wells within the city and its jurisdiction.”

**Athens**
In Athens, signatures for an “Athens Community Bill of Rights and Water Supply Protection Ordinance” were gathered and submitted to the county board of elections who, after education by the industry, decided to unanimously vote to not put the issue on the ballot.

**Niles**
Next, the City of Niles made headlines when representatives from the Environmental Legal Defense Fund and the Sierra Club sent a draft “Bill of Rights” to the members of City Council. The same day they received it, the council put it to a vote by emergency and said “no” to oil and gas development, hydraulic fracturing, water or brine hauling within city limits. This is a very curious action by council considering they also sell water to the industry. One could wonder if they are violating their own ordinance. The industry has set an education forum in Niles that will include the members of council. More to come on Niles, so stay tuned.

**Salem**
The City of Salem and their push to restrict development, which they support, to the industrial zones of the city has gotten interesting. A public meeting was held recently by anti-development organization Frack Tracker that was attended by 6 members of the community. Upon realizing that their efforts made a mountain out of a mole hill, the members of council are in talks with the Association and other groups to walk back from this position so that the “open for business” sign will stay lit in Salem. Keep Salem on your radar as positive changes are coming.

The most important message to take away here is that this issue can pop up anywhere and at any time, for any reason. If you hear, see, or read that the Community Environmental Legal Defense Fund, National Resources Defense Council, or a Bill of Rights committee is talking with your local media or local officials - SAY SOMETHING - because these efforts move very quickly.

The Association, in coordination with Energy in Depth and other energy partners around the state, are continuing to not only monitor the situation, but engage local officials, local media and allies to push back using education and common sense to defeat these misguided efforts. This effort will be ongoing and with the strong support the Association has built with chambers, labor, landowners and others we will continue to win the day for all producers across the state.
Looking back, Association membership had peaked in 1980 at 3,000—very similar to the membership growth experienced by OOGA in recent years.

The OOGA full time staff has grown to eleven with the recent edition of two in the areas of membership communication and public relations.

Much like our previous locations, the new space will accommodate our staff growth and is strategically located to serve our members. OOGA will continue to own the Granville office building and retain a presence with access to office and meeting space. The Ohio Oil & Gas Energy Education Program that has shared space with OOGA, will now be able to expand current offices and storage space as they continue their great work representing our industry throughout the state.

We are proud of the legacy that those that have come before us have provided. Please join me in celebrating the next chapter of our Association.

Regards,

Joel Rudicil
Member Spotlight

William Kinney, Summit Petroleum

This month marks the inaugural edition of our Member Spotlight. This series will feature legacy OOGA members who are in the producer or well service company categories and who have also been a member of the Association for at least ten years. If you’d like to suggest an individual to be highlighted, please contact Anne Carto.

Share how you got involved with the oil and gas industry?

I’ve always had a small business. I graduated from Kent State in 1976 but I worked my way through college painting houses. I started painting houses because I had a paper route and I met people on my route that wanted their house painted. It all layered onto each other! I got into the oil and gas industry because I was painting houses and it was suggested that I could paint storage tanks. These little pieces of entrepreneurship moved forward.

I left Kent in ’76 and matriculated to Hudson, drilling gas wells for Park Ohio. I worked for Park Ohio for eight years running the field operations. It was a large independent public company who had come to Ohio to drill gas wells for their forging business.

In 1984, I started my own business. I was fortunate to run into a friend of my father’s, Charlie Schmidt, who gave me an office (space) in his office. He also gave me a telephone and a desk and he said for the next two years I could run my business out of his office. In the end, I asked him what he wanted for payment and he said the only thing I want you to do is pay it forward. So over the last 25 years, I’ve had half a dozen people who started their business or ran their small office out of my office. I would encourage anyone who is in business to do the same thing.

I don’t feel like I’ve ever had to work a day in my life. I love what I do. I’ve always enjoyed doing stuff with the Association; it’s been so much fun. I look forward to the meetings—they are so interesting. What an interesting cross-section of people; everyone has their own stories.

Tell me about establishing Summit Petroleum.

It was September 10, 1984 and I didn’t have a clue what it would be to own an oil and gas business, not at all. The industry was in a transition period, gas prices were dropping, oil prices were dropping and every time there was a layoff, there were 20 new consultants in the industry. There was no loss of pride from being fired from a job, everyone was getting canned. I was one of those guys that got swept in with the first wave and got flushed out with the next one, so I started my own business.

What was the biggest challenge you faced with your company?

Trying to come up with quality prospects in a changing market. I always felt that as long as I could come up with wells that were economically viable that everything else would fall into place. I think that’s always been the case for oil and gas operators --that you always want to come up with the very best prospects that you can drill for yourself, for your partners, for everything. It’s the key to the industry; it’s what drives us. Without a doubt the greatest challenge is coming up with good stuff to drill.

How would you say your deep involvement with OOGA has helped your company?

Without a doubt being involved in the Ohio Oil & Gas
Association has been a network that has led me to other oil and gas operators. First you form a friendship, and then it's a relationship, and then it's a joint venture and then it's an introduction to another oil and gas operator. It isn't the reason you do these things but it's clearly a benefit that occurs, and for me it's made all the difference.

Specifically with OOGA and your time with the organization, what were challenges the Association faced or successes that stick out in your mind?

There have always been challenges; it's a steady thing. The most important thing you can do is not be overwhelmed by the concept that there are steady challenges—you just have to face them. There have been regulatory hurdles all along the way,

For me, the most significant challenge was getting the state to identify the importance of having preemptive control over all issues related to oil and gas. When I was president of the Association we passed HB 278, it wasn't just me it was a whole group that recognized the value of it. Home rule certainly has its place, and they should have their voice, but it can't be an automatic veto on anything coming into communities and that's why you have a statewide rule of law for oil and gas.

Without a doubt, none of the development that's occurring now would have happened in its current form had it not been for HB 278 and Ohio having preemptive rule over oil and gas matters. I think everything else that we have done is built on that foundation, so I feel lucky to have been a part of that.

Do you have advice for those trying to break into the oil and gas industry?

Never be overwhelmed by the things that you see in front of you. Just take things one piece at a time, find the part that you know you can do and work from that. Any of us looking back would say that there were greater hurdles in front of us, but if you don’t pay attention to those hurdles [laughs]…the reality is there is a path through. I would never want anyone to be discouraged by the barriers to the industry or say that the barriers are too great—because they aren't. You just simply have to view the tasks one at time, take them on, and move forward.

Ohio has a great network to rely on—of contractors, a good regulatory environment, and the network of the Association for infrastructure development. We're in a great situation here and I would encourage anyone interested in developing any aspect of the industry to come in and give it a try.

Want more? Check out our blog each month at www.ooga.org for video profiles on highlighted members!
Next Bill on Ohio Underground Damage Prevention Starting to Take Shape

By: Brian Hickman, Director of Government Affairs

In a recent meeting of the Ohio Underground Damage Prevention Coalition (OUDPC), State Representative Robert Sprague (R-Findlay) indicated his desire to begin the initial process of drafting the next piece of legislation regarding Ohio’s implementation of federal 8-1-1 law. Rep. Sprague has indicated that he would like this legislation to focus specifically on the topic of enforcement.

At the August 26th coalition meeting, it was noted that the U.S. Department of Transportation Pipeline and Hazardous Materials Safety Administration (PHMSA) is in the process of finalizing federal rules regarding enforcement of federal 8-1-1 law. These rules are expected to come early in 2014. Additionally, it is believed that the federal government may try and force states, like Ohio, that do not currently have enforcement mechanisms within their laws to simply comply with the federal PHMSA proposal.

Rep. Sprague, who was the sponsor of House Bill 458 last year, noted that it is his goal to have an enforcement mechanism enacted into law as it pertains to Ohio’s underground damage prevention law. He informed the group that the proposal may include how enforcement data is collected by the enforcement agent for the state. This has been an issue of debate before the Coalition, generally involving would said data be of the public record or could it be used in any legal action to the potential violation. Finally, Rep. Sprague did state that he was willing to look at one additional provision that was tabled during the House Bill 458 discussion. The topic involves a provisions currently enacted into Ohio law pertaining to contractor training on underground damage prevention.

Sprague concluded his comments to the group by noting that additional topics may be considered for the upcoming bill discussion. However, the focus of this legislation must be enforcement and those new provisions must have consensus amongst the group to be included in the bill.

Additionally, discussions within the OUDPC are focusing on crafting enforcement language that would satisfy PHMSA. Generally speaking, the language currently provides the Public Utilities Commission of Ohio (PUCO) with the regulatory authority for enforcement. The OOGA has stated to the Coalition that if the PUCO were to be provided this authority, it must be narrowly tailored to pertain only to the enforcement of potential violations of Ohio’s underground damage prevention law. Any expansion of the PUCO’s regulatory authority into other areas (such as gathering lines) will not be acceptable.

Current language before the OUDPC on enforcement also details various ranges of fines for violations of Ohio underground law. The general proposal would create a range of fines for multiple violations of Ohio underground law. For example, if an individual violated the law, they would be fined a minimum of $1,000 plus any relevant multipliers. If this same individual had 2-5 violations of the law, their fine would double.

It should be noted that the enforcement language as described above has not been finalized or approved by the OUDPC and continues to be discussed.

More discussions, including interested party meetings on the legislation, are forthcoming when the legislature reconvenes for the fall.
Commerce Committee

Basis Blow-Out

By: Steve Downey, Co-Chair Commerce Committee & Chair Midstream Subcommittee

If your company has recently had a gas marketing contract come up for renewal, you may have been surprised by the basis quote from your marketer. What historically has been a very strong market, Ohio is now feeling the effects of the shale drilling in Ohio, Pennsylvania, and West Virginia, the hangover of a storage glut, and the lack of a sustainable market. Indeed, each annual contract renewal cycle over the last several years has seen the Dominion East Ohio basis numbers degrade from one cycle to the next, and we have now crossed into the dreaded negative basis territory. To illustrate this point, DTI South Point basis cratered to a negative $0.655/Mcf on July 29, 2013 before rebounding to today's negative $0.235/Mcf (GD 8-20-13). Is this the new norm or is there any relief in sight? In this article, we will touch briefly on the causes and the possible solutions that may alleviate the issue in the coming years.

Supply Growth. Despite low levels of dry gas drilling activity, natural gas production continues to climb with year on year gas production up 3% or 2.0 Bcf/d. Pipeline flows suggest that total Appalachian supply is up 4.0 Bcf/d, more than offsetting declines in the traditional dry gas basins in the Southwest of 1.7 Bcf/d. To that end, Marcellus supply growth has caused a dramatic swing in Appalachian basis differentials relative to NYMEX. Shale gas production from Pennsylvania hit a record 1.4 Tcf in the first 6 months of 2013, doubling the production of 704 Bcf reported a year earlier. This will only increase as it’s estimated that there is still a backlog of 2,000 wells that have already been drilled that aren’t yet interconnect with pipelines. Moreover, as mentioned above, following completion of the first of many processing plants in Ohio in June, daily cash basis differentials at DTI South Point dropped to negative $0.655/Mcf and the August NYMEX close was negative $0.51/MMBtu. Appalachian supply is bound to continue its growth pace, particularly with Utica shale ramping up now that Utica focused processing is coming on line.

Processing & Fractionation. With Natrium, Utica East Ohio Midstream, and Markwest Energy Partners’ processing plants primarily dedicated to Utica production, and combined with the plants already in operation in Pennsylvania and West Virginia dedicated to the Marcellus production, natural gas processing capacity in the wet gas regions of the Utica and Marcellus is poised to increase 2.4 Bcf/d in 2013 and 2.1 Bcf/d in 2014 adding a significant amount of gas and NGLs to the market. However, limited Appalachian NGL demand and ethane rejection (the process of leaving the ethane in the gas stream instead of separating it due to lack of market demand) is causing the Btu to exceed downstream pipeline gas quality specifications, and until the ATEX pipeline goes into service in the first quarter of 2014 to supplement the Mariner West capacity, and more NGL pipeline capacity, such as Bluegrass Pipeline or the recently announced joint venture between Kinder Morgan and Markwest, is built in the coming years, dry gas via Rockies Express Pipeline (REX) is delivering gas into the market area to blend with the Appalachian produced high Btu gas from the Marcellus and Utica. Indeed, the REX basis differential has actually turned to a positive as compared to Opal making it economic again to transport gas from that basin to Appalachia for the express purpose of blending with the shale production. Although this is necessary for operational reasons, it adds to the glut of gas in the basin and further puts pressure on Appalachian prices.

Continued on the following page
Moreover, with the start-up of the processing plants in the Utica, traditional deliveries into Dominion East Ohio are being displaced by Utica supply, fortunately, at present time, the conventional production continues to flow, albeit under depressed prices, and the brunt of the displacement is the interstate pipeline gas.

**Storage.** Despite the beginning of the traditional injection season in April 2013 starting off with two consecutive withdrawals and rallying prices at the time, US gas storage inventories blew past the 3 Tcf mark for the week ending August 9, 2013 according to EIA as mild weather and little fuel switching across most of the US has increased injections throughout the cycle. As of the August 9 date, the surplus to the five year average stands at 43 Bcf while the deficit to a year ago levels narrowed to 252 Bcf. The weather models continue to show cumulative cooling degree days for the first half of August numbering in the bottom 10 of all observations recorded since 1950. Barring an unlikely circumstance, the remaining weekly injections will outpace the five year average nearly halving the year over year storage deficit by the end of August and likely eliminating it altogether by the end of the injection season.

So is there any relief in sight or are we destined to begin paying someone to take our gas? Fortunately, there are projects in the hopper that will ultimately mitigate the glut, although unfortunately, we will have a few more years to ride the storm out as we await the reversal of pipelines to backhaul gas, the approval and construction of LNG export terminals, and the retirement of coal fired power plants to generate electricity.

**Proposed Backhaul Projects.** At least nine projects have been announced to transport gas to the Southeast and Midwest from the Appalachian Shale in recent months, and the likelihood of them happening is much greater now given the success of the Marcellus and Utica; however, the in-service dates of the projects range from December 2015 to April 2019 and only one is in service at the present time. All will require some level of regulatory approval, and environmental and customer protests and challenges are to be expected so their completion is not a given. The following table summarizes the proposed backhaul projects:

### Proposed Backhaul Projects Table

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<th>Project</th>
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<th>Capacity</th>
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<td>TX, LA</td>
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<td>Transco</td>
<td>Alabama</td>
<td>450 Dth – 1 Bcf/d</td>
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<tr>
<td>Uniontown to Gas City</td>
<td>Spectra Energy</td>
<td>Gas City, IN</td>
<td>125 Mdth/d</td>
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<tr>
<td>NEXUS</td>
<td>DTE/Enbridge/Spectra</td>
<td>MI &amp; Ontario</td>
<td>1 Bcf/d</td>
<td>11-2016</td>
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</table>

**Proposed LNG Export Projects.** Analysts believe that the US can export between 6 and 8 Bcf/d of LNG before domestic gas prices are adversely impacted and, to that end, the DOE has been operating under that assumption to approve LNG projects. Three projects have been approved and one project is possibly near approval to export a total of 6.2 Bcf/d to non-FTA countries; however, much like the pipeline backhaul projects, significant regulatory and environmental work must be completed to bring the projects to fruition. Unfortunately, these projects will not provide any relief to the supply glut in a meaningful way until near the end of the decade.
Proposed LNG Export Projects Table

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<th>Project</th>
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<td>Sabine Pass</td>
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<td>1.3 Bcf/d</td>
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<td>Freeport LNG</td>
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<td>Cove Point</td>
<td>Dominion</td>
<td>1 Bcf/d</td>
<td>MD</td>
<td>Pending</td>
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</table>

Electricity Generation. In 2012, 9 gigawatts (GW) of coal fired generation was retired which accounted for 3% of total US coal plant capacity of 316 GW. Another 30 GW of retirements have been announced between now and 2016 which represents 10% of the nation’s coal fired capacity, and that could double under various regulatory scenarios. Domestic coal production is falling and coal producers are searching for new markets overseas which bodes well for natural gas. However, Asia, the primary market for exported coal is experiencing economic turmoil and the price for domestic coal has collapsed. Natural gas prices have averaged $3.68 based on the NYMEX close through August 2013 based on the strength created earlier in the year due to the late withdrawals from storage and the deferral of the injection season. So effectively, until gas prices fall below $3.00, as we saw much of in 2012, natural gas is priced out of the electricity market. This is evidenced by the strong storage injections we have seen this season as compared to last year. Notwithstanding this, natural gas is gaining over coal because coal fired plants are being retired and natural gas fired plants are being built to replace them. Of course, coal will not go without a fight, and the lead time necessary to build new gas fired power plants is long. Unfortunately, electricity generation will not provide immediate sustained relief to low natural gas prices in the near term.

So, in summary, help is on the way, unfortunately, it may not be here until 2016 and beyond. I encourage you to speak with your trusted marketer(s) to discuss strategies to help you weather the storm.
Two natural gas processing facilities are up and running in eastern Ohio, helping to relieve the bottleneck Ohio has experienced since Utica Shale development began a few years ago. These facilities are only two of the six natural gas processing facilities being planned for the region. These projects are investing billions of dollars in Ohio.

Utica East Ohio (UEO) and MarkWest’s Cadiz facility are both currently processing natural gas, unlocking the added value of natural gas liquids like propane, butane and ethane from the high btu natural gas that the Utica, as well as other formations, hold in Ohio.

When many people think of natural gas liquids they only think of the Utica. It should be noted that Clinton wells in southern Ohio produce a 1,100 to 1,150 btu gas while the Berea and some shallow Devonian wells produce a btu rating of 1,200 or more; meaning there is something there for our conventional producers as well.

On July 28, Utica East Ohio (UEO), a joint venture by Access Midstream, M3 and EV Energy Partners, became the first fully-integrated gathering, processing and fractionation complex to be put into operation in eastern Ohio. The initial phase of the UEO project is now capable of processing 200-million-cubic-feet-per-day (MMcf/d) at their cryogenic processing facility near Kensington, as well as processing 45,000-barrels-per-day of natural gas liquids at their fractionation, storage, and rail facility near Scio.

When complete, the UEO project will include 800 MMcf/d of cryogenic processing, 135,000 barrels-per-day of natural gas liquids fractionation, 870,000 barrels of natural gas liquids storage and a rail facility capable of loading 90 cars per day.

The MarkWest Cadiz facility began accepting natural gas late last year with an interim plant processing facility that was able to process 60 MMcf/d while the initial phase of the facility was still being constructed. MarkWest is currently processing 185 MMcf/d from a 125 MMcf/d processing facility called Cadiz I and the 65 MMcf/d interim facility. MarkWest plans to increase the capacity to 325 MMcf/d by mid-2014 with the completion of Cadiz II, a 200 MMcf/d plant. At that time, the interim plant will no longer be needed at the Cadiz complex.

In addition, MarkWest is currently building their second complex in Noble County near Somerfield, called the Seneca processing complex. When complete, the Seneca complex will host three 200 million-cubic-feet-per-day cryogenic processing plants with a recently announced 38,000 barrels a day de-ethanization plant. The first portion of the Seneca complex is scheduled to be up and running in the fourth quarter of this year, with the remaining portions to be completed in 2014.

MarkWest has also just recently announced a third natural gas processing complex in Tuscarawas County near Uhrichsville and Dennison. That complex will include two 200 million-cubic-feet-per-day cryogenic processing plants.

These facilities are just a snap shot of what is happening in Ohio in terms of midstream development. Blue Racer, a joint venture between Dominion and Caiman, and Hickory Bend, a joint venture between NiSource and Hilcorp, are both in the process of constructing pipelines and natural gas processing facilities in Ohio. Blue Racer does have a jumpstart with the Natrium facility up and running in West Virginia.

These natural gas processing facilities have brought billions of dollars of investment to Ohio over the past two years. They are the key to unlocking the bottleneck we are currently experiencing in the Utica and making the play as prolific as it has been touted. Of course, it is not only the Utica developers that have a chance to experience the added benefits of natural gas processing. The midstream developments could provide added revenue to our conventional producers, benefiting all of Ohio’s oil and gas industry.
Anti-Development Surpasses Pro-Industry in Harnessing the Power of Social Media

By: Anne Carto, Communications Coordinator

In recent years, technology has given the oil and gas industry the ability to grow immensely in the United States. During the same time, social media has given the public, organizations, and companies the opportunity to voice opinions, and what they deem fact, in an open forum. Social media and the Internet have created universal discourse free from fact-checking, peer review, and sources. Some consider this an innovative blessing—giving each person an equal voice. However, in some cases, it can be used to spread propaganda and misinformation to a wider audience. Anti-oil and gas development groups are currently using these tools with relative success.

According to Dictionary.com, “Social media” can be defined as “web sites and other online means of communication that are used by large groups of people to share information and to develop social and professional contacts”. Twitter and Facebook come to mind when many hear the term. Both have an unbelievable following.

There are almost 555 million active users currently on Twitter. Facebook says it now has more than 1.1 billion people using their site each month. Yes, more than a billion people. This has given individuals the ability to come in contact with people across the world that share their similar interests and viewpoints. This is the case for supporters of the oil and gas industry and those set on debilitating the industry.

A well-known anti-development organization is 350.org. They get their name from deeming “350” to be the “safe upper limit of CO2 in the atmosphere”. The organization explains on their website how their supporters can “harness the power of social media”:

“Social media is a powerful tool for activists and advocates, and everyone who is able should use it for good. Like a brick, you can build something huge with it, or cause some minor chaos. We don’t think we need to choose between speaking truth to power and using the very best bullhorn that creativity and passion can buy... We use social media [to] amplify this movement’s most inspiring stories, spread its most innovative ideas, and forge powerful connections around the block and around the world.”

So who sees the “inspiring stories” and “innovative ideas”? Their tweets go to more than 153,000 users. The problem is that many of their stories and ideas are based on myths or misinformation. How many of those 153,000 people are being misled? As many in the oil and gas industry know, it is much easier to make accusations and claims than defend complicated technology and science in a 140-character tweet.

The oil and gas industry has begun to make strides in social media, attempting to push their followers to engage each other on the Internet. While some in the oil and gas industry are active social media users, it still does not compare to anti-development activists and celebrities that corral the common person to the cause.

A well-known industry fact-checking organization, Energy In Depth, has a little more than 24,000 likes on Facebook and 15,000 followers on Twitter. These accounts, like the Ohio Oil & Gas Association’s accounts, spread positive stories about job creation and energy production in the US. 350.org spreads debunked studies and disproved cases of water contamination, but has a following that is tenfold. Ann McElhinney, Director of FrackNation, has more than 5,000 followers on Twitter. She often directly engages the opposition, including Gasland director Josh Fox, for their erroneous claims. With only 5,000 followers, it is hard to be noticed when celebrities like Mark Ruffalo (or “The Hulk” if you prefer) is tweeting false information about the industry to his 520,000 followers.

There is an obvious lack of balance when it comes to the two sides of oil and gas development. Facebook groups like “Shattered Dreams of the Marcellus and Utica Experiment”, “No Fracking Way”, and “Anti-Fracking, Pro-Earth” are much more eye-catching than the pages of industry groups such as “Energy Nation” and “Energy From Shale”.

As Ann McElhinney often preaches, it is time for supporters and professionals of the oil and gas industry to engage the public through social media. A billion people using one website is a big deal and it is not going away any time soon. Spreading factual information, academic studies, and inspiring stories from Ohio’s rural communities can go a long way and have a huge impact on public perception and regulation. We must be willing to take the time to tell our factual stories in our own words and combat this trend of blatant misinformation.

Be sure to “Like” OOGA on Facebook at facebook.com/ooga.org and follow us on twitter at twitter.com/ooga_hq
IPAA Final Comments on BLM Hydraulic Fracturing Rule Submitted

Independent Petroleum Association of America

Sixteen months ago, the Bureau of Land Management released its proposed well stimulation and hydraulic fracturing regulation for Federal and Indian lands. The original intent of the rule was to ensure that the hydraulic fracturing process does not contaminate groundwater. IPAA opposed this rule because it imposes costs that are not commensurate with any benefits the rule might provide and because the proposed rule is duplicative of States’ efforts to regulate oil and natural gas. IPAA urged BLM to produce a gap analysis identifying inadequacies in existing requirements that BLM’s proposed rule would remediate. BLM has not done so.

BLM received 177,000 comments from interested stakeholders in response to the original proposal. To address the shortcomings documented in those comments, in May 2013, the BLM issued a supplemental proposal. Unfortunately, the revised proposal reflected in BLM’s current rulemaking still fails to account for the facts related to hydraulic fracturing. BLM’s proposal is technically unsound, and does not provide any benefits that the already-existing regulations currently provide. Because the revised proposal arbitrarily imposes costs without providing any corresponding benefit, IPAA still opposes the proposed rule and respectfully requests that the Administration withdraw the regulation.

Below are various technical issues that we believe make the rule unworkable.

Usable Water Definition Creates Confusion for An Existing Regulatory Structure: BLM’s proposal defines all water as usable down to a 10,000 part per million total dissolved solids standard and requires operators to protect that water.

Contrary to current practice, the proposed rule assigns individual operators, not the State agencies with specialized knowledge of local water zones, the responsibility to determine what geologic areas require protection.

The proposed rule imposes significant compliance costs associated with additional cementing and logging obligations without providing any environmental benefit or additional protection. State/Tribal or Basin Variance Language is Flawed: The proposal purports to contemplate a procedure by which BLM would recognize compliance with a State or Tribe’s requirements as equivalent to compliance with BLM’s rule but does not provide any process or procedure for securing the variance.

The variance process is unclear, discussed only in the preamble with no technical language or proposed regulatory language provided.

The variance provisions provide operational uncertainty because BLM would have unfettered discretion to revoke or modify the variance. Economic Analysis is Inadequate and the Rule is Arbitrary and Capricious: BLM’s economic analysis estimates costs of $3,138-5,011 per well for a cumulative cost to industry of $12-20 million.

An independent analysis estimates cost per well to be $96,913 reflecting a cumulative annual cost of $345 million.

BLM’s analysis omits several significant categories of cost to industry.
All aboard!

That was the message from OOGA Vice President David R. Hill when he recently took several members of the local media on an “all access” rig tour in Southeast Ohio. Mr. Hill was joined by local and out-of-state staff from PDC Energy, OOGA staff, and Shawn Bennett from Energy in Depth. The tour showcased a drilling rig, focusing on how it operates, by allowing the media to listen to a safety briefing, strap on some safety gear, walk around the pad and step into the doghouse. These rig tours are a part of ongoing efforts to show the transparency of the oil and gas industry when it comes to their operations.

Reporters from the Akron Beacon Journal, the Daily Jeffersonian, the Marietta Times, and the Associated Press asked everything from who works at the site to how long the equipment will be on location. Mr. Hill and the crew from PDC took all the questions and gave direct answers to help the reporters better understand what they were viewing in an effort to communicate these facts to their readers.

What may have been most surprising is that most of the visitors have been writing about oil and gas development or shale activity for months, yet they still had some very basic questions. It is important that, as both an Association and an industry, we answer those questions so that those in the media have both the facts and correct information when compiling a story.

Look for more information about tours in the future as the Association continues to aggressively reach out to TV, radio and print outlets across Ohio to share the message of job creation partnered with environmental protection.

Lastly, a hearty thanks from the Association to Mr. David Hill and the leadership of PDC Energy for allowing access to their site for our friends in the media.

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**AUCTION**

**Machine Shop Equipment**

**Wed., Sept. 25, 2013 at 10:00 AM**

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- Grinding Equipment
- Magnetic & Manual Chucks
- Radial Arm Saw
- Cut-off Saw
- Shaper
- Hyd. Power Unit w/Tank
- Heat Treating Furnaces
- Oil Quench Tank
- Air Compressor
- Welder
- Welding Turn Table
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- Micrometers
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Group Looking Into Secession Due to Overregulation of Oil and Gas Industry

By: Brian Hickman, Director of Government Affairs

A movement is underway in Colorado to explore the option of seceding from the state due in part to the perceived overregulation of the oil and gas industry. “North Colorado” includes a group of 10 rural counties located in Northern Colorado which contain a majority of Colorado’s oil and gas production. Several residents of these areas feel disenfranchised with the current nature of state government, claiming that the viewpoints of rural counties are not being properly represented.

At its core, this urban county vs. rural county debate drives the secession discussion. In Colorado, legislative districts are currently designed by population density. To this end, many rural residents and counties feel that their voices are either not being heard or being drowned out by the urban counties.

These feelings have been heightened in the recent legislative session. The legislature, which is controlled by Democrats, has passed several initiatives that has angered urban citizens. Measures recently enacted include stricter gun laws, increased renewable energy standards, and the recently enacted constitutional amendment to legalize recreational marijuana.

However, recent proposed changes to Colorado oil and gas law have been a focal point of this debate. During the 2013 legislative session, an additional increase in state inspectors and additional reporting requirements pertaining to spills were approved. Additional legislation was introduced that would increase the maximum penalties under law for violation of oil and gas law, require stringent water testing around well sites, and prohibit newly-appointed commissioners from serving on the Colorado Oil and Gas Conservation Commission if they are an employee of an oil and gas operator. Environmental groups continue to push Democrats to go farther in the regulation of the oil and gas industry.

With this as a background, the counties of Weld, Phillips, Yuma, Kit Carson, Morgan, Logan, Sedgwick, Lincoln, Cheyenne, and Washington have begun exploring their options to better represent their residents. It is also noteworthy that eight of these ten counties are currently in the top-ten oil and gas producing counties within the state. Secession appears the most popular answer for residents, while county representatives are looking at modifying Colorado legislative district to be based upon size rather than population.

During a recent public meeting, Weld County Commissioner Sean Conway highlighted the debate as it pertains to the oil and gas industry.

“The very things that are leading to economic prosperity, most of which are coming out of right here, they (legislative Democrats) want to go after,” noted Conway. “When you talk about our very way of life being under assault, it’s the constant drumbeat of rules and regulations from the state legislature and frankly, they’re not hearing us out here.”
Conservancy District Benefitting From Oil and Gas Development

By: Shawn Bennett, Energy In Depth

As many of you know, oil and gas development and the Muskingum Watershed Conservancy (MWCD) have maintained great working relationship since it was formed. In fact, the first oil and gas lease was signed in 1934, just one year after the MWCD was formed.

Created in 1933, MWCD is tasked to reduce flooding and conserve water for beneficial uses in the Muskingum Watershed, which covers nearly 20% of the state. Today, the MWCD covers 8,000 square miles with 16 dams and reservoirs that provide flood reduction, recreation, and water conservation for the region.

The MWCD has an estimated 275 Clinton wells producing royalties with 120 wells on MWCD-owned property. All of these wells are essential in helping fund the agency for flood reduction and operational costs.

While oil and gas development has always been an important partner of the MWCD, it wasn’t until a few years ago the MWCD really began to understand how important this partnership was going to be for their future. With Utica Shale development emerging across eastern Ohio, the MWCD was in a prime spot to capitalize on the acreage they have accrued since its inception.

In 2011, the MWCD negotiated two leases with Chesapeake and Gulfport at the Clendening and Leesville reservoirs. These two leases brought the MWCD over $37 million in revenue. This unanticipated revenue allowed the MWCD to reduce its debt and replenish its cash reserves.

Most recently, the MWCD entered into a new oil and gas lease with Antero Resources at their Seneca Reservoir bringing in over $30 million in new revenue that will go to funding park, recreation, and public access improvements at Seneca Lake. The MWCD has already used a very small portion of that funding to build a beautiful brand new welcome center for park visitors, take ownership of the marina, and purchase a new water obstacle course for the beach.

Currently, the MWCD has identified over $80 million in repairs, maintenance, and capital improvements that must be addressed. The oil and gas industry will be playing a major role in funding those projects through leasing and royalties paid to the MWCD. In fact, the MWCD has already received over a million dollars in royalties to help fund these projects.

In addition to leasing land, the MWCD has also entered into short-term water sales to companies needing water for their operations. Since 2011, the MWCD has sold over 59 million gallons of water to oil and gas companies while making $500,000 in the process. Again, with a focus on conservation, the MWCD sold much of the water via temporary water lines to well sites. These temporary lines were responsible for removing 18,000 water truck trips just in Harrison County.

Unfortunately, the MWCD has not entered into any long-term water agreements, mostly due to opposition from the anti-oil and gas crowd. This is an issue that needs to be addressed. The Seneca Lake summertime pool holds over 14 billion gallons over water and the lake also draws down 6 billions gallons of water a year during the winter as do Clendening and Piedmont combined. There is plenty of water to be sold into long-term water agreements that will benefit all of Ohioans with affordable and reliable energy.

Dependable water withdrawals can make or break the emerging shale industry in Ohio. The MWCD is open to listen and the Ohio Oil and Gas Association is working on the solution. We just need to keep the anti-development crowd honest and not allow them corrupt the MWCD board with their wild claims of flaming faucets and purple squirrels.

This longstanding partnership is only getting better as shale development increases. The revenue generated from leasing, royalties and water sales will help make improvements to the parks, lakes, and recreation areas that will bring in more tourism and give our residents more incentive to enjoy the outdoor activities the MWCD provides. Conservation and the industry truly make for a great partnership.
Federal Pipeline Safety Regulator Proposes New Integrity Verification Process for Gas Transmission Lines

By: Keith J. Coyle, Babst, Calland, Clements & Zomnir, P.C.

On August 7, 2013, the U.S. Department of Transportation’s Pipeline and Hazardous Materials Safety Administration (“PHMSA”) held a public workshop to discuss its proposal for creating a new integrity verification process (“IVP”) for gas transmission lines. While still in the early stages of development, the IVP is part of PHMSA’s efforts to comply with a mandate in the Pipeline Safety, Regulatory Certainty, and Job Creation Act of 2011 (“Act”), the most recent reauthorization of the federal pipeline safety laws, and to address the safety recommendations issued by the National Transportation Safety Board (“NTSB”) after investigating a September 2010 natural gas transmission line incident that occurred in San Bruno, California.

Section 23 of the Act requires operators to verify the established maximum allowable operating pressure (“MAOP”) for gas transmission lines in densely populated and other high consequence areas (“HCAs”) and to submit documentation to PHMSA identifying each pipeline segment with insufficient records to confirm the established MAOP. It also requires PHMSA to establish regulations for conducting tests to confirm the material strength of previously-untested gas transmission lines that are located in HCAs and which have an operating pressure that exceeds 30 percent of specified minimum yield strength (“SMYS”).

The provisions in section 23 are largely based on a series of safety recommendations that NTSB issued in response to the San Bruno gas transmission line failure. Among other things, NTSB advised PHMSA to delete a “grandfather clause” for gas transmission pipelines constructed before 1970 and require that such lines receive a hydrostatic pressure test that incorporates a spike test. NTSB also recommended that PHMSA only consider manufacturing- and construction-related defects to be stable if a gas pipeline received and passed a post-construction hydrostatic pressure test of at least 1.25 times MAOP. Finally, NTSB stated that PHMSA should require that all natural gas transmission pipelines be capable of accommodating in-line inspection tools, or “smart pigs,” with priority given to older pipelines.

The IVP proposal seeks to implement the Act’s mandate and NTSB’s recommendations by requiring gas transmission line operators to follow a 21-step integrity verification process.

Steps 1 to 8 require operators to identify pipeline segments that are operating under the grandfather clause, that have insufficient records to confirm the established MAOP, or that lack an acceptable pressure test or have a history of failures attributable to manufacturing and construction defects. Step 9 calls for a determination as to whether any of these pipeline segments are located in an HCA or a so-called “moderate consequence area” (“MCA”), a newly-created risk category that would include non-HCA pipe in densely populated areas and certain rural locations.

Steps 10 to 14 require operators to determine whether they need to perform destructive or non-destructive testing to establish the material properties of certain low-stress and high-stress pipeline segments that lack sufficient validated and traceable documentation. Steps 15 to 20 prescribe assessment options for re-establishing the MAOP of these segments. Those options include using a hydrostatic pressure test supplemented with a spike test; other segment-specific assessment methods, such as inline inspection tools, close interval surveys, coating surveys, interference surveys, and engineering critical assessments; derating the MAOP commensurate with the class location; or replacing the affected segments.

PHMSA noted in the workshop that operators would be required to comply with any additional or more stringent state pipeline safety standards as part of the IVP. PHMSA also stated that operators may be able to minimize the time and cost associated with implementing the IVP by beginning with step 9 in the process and determining whether they have any pipeline segments in higher risk locations. According to PHMSA, there are approximately 300,000 miles of gas transmission lines in the United States, and approximately 91,000 miles of these lines are located in HCAs or MCAs.

PHMSA emphasized that the IVP is still under development and that the comments received at the workshop and in other forums would be considered in fleshing out its proposal. PHMSA also noted that the implementation of the IVP would be part of multi-year effort with graduated compliance deadlines that would focus, first and foremost, on higher risk pipeline segments.
Other OOGA Services

Permit and Plug Lists

Before the internet became mainstream, frankly not that long ago, the ODNR maintained paper files of oil and gas permits issued. These are public files and open for public viewing. If you were interested in looking at them, a drive to Columbus was required. OOGA provided a valuable service to its members by making these trips, gathering this information and then making them available to the membership on a subscription basis.

Introduce the Internet

Subscriptions to the weekly printed permit lists started to taper, and with good reason. The information was available, albeit in an obtuse way, online. Members could access the information from their home, office, or even while on vacation. The problem was that the information, while available and viewable, was not particularly accessible or convenient.

Last year, OOGA revamped the method of distribution for the weekly permit information. The goal was to extract, at a minimum, the same information as previous reports, but added some additional utility and value. After all, it is simply a list.

Subscribers to the Permit and Plug list receive a weekly email, early in the week, of the prior week's permits granted. Included in that email are 5 files.

1. The permit list as an Adobe PDF file, suitable for printing that looks very much like the old print and mail permit list.
2. The permit list as a “flat” Microsoft Excel file, a conventional spreadsheet version of the list.
3. An alternate permit list, a Microsoft Excel file, which contains significant additional permit information captured by the state, and previously not included in the reports.
4. A Google Earth KMZ file. Open this file on a computer with Google Earth installed on it, and a Google map appears with the permit well spots. Click on a spot, and the permit information appears in a pop up window.
5. An ESRI ArcView Shapefile suite of files. These files allow easy import into a variety of mapping systems.

These files are produced with minimal processing, and are intended to represent the permits as submitted to and granted by the ODNR. Unless there is a blatant error (for example - a well spots over in the Atlantic Ocean for example) the data is not modified for the OOGA reports. The same cautions apply when using this data as with any state data.

The intent of the OOGA permit list subscriptions is to provide the permit information in a convenient format allowing subscribers to view and use the information quickly and easily.

If you would like to start receiving the weekly permit list, or the weekly plug permit list, contact OOGA. The cost is $100 per one year which runs concurrently with your membership anniversary date.
### Explorer Foundation Corporate Members

#### Discovery Members

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<td>Gulfport Energy Corporation</td>
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<td>Dominion East Ohio</td>
<td>Ohio Oil Gathering, LLC a Crosstex Energy Services Company</td>
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<td>Eclipse Resources - Ohio LLC</td>
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#### Wildcat Members

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<td>Dominion East Ohio</td>
<td>Ken Miller Supply, Inc.</td>
<td>Vallourec &amp; Mannesmann USA</td>
</tr>
<tr>
<td>The Energy Cooperative</td>
<td>KENOIL, Inc.</td>
<td></td>
</tr>
</tbody>
</table>

#### Scout Members

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Company Name</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Choice Energy Services</td>
<td>Buchanan Ingersoll &amp; Rooney PC</td>
<td>Edgemarc Energy Holdings LLC</td>
</tr>
<tr>
<td>Advanced Energy Services, LLC</td>
<td>Buckeye Oil Producing Co.</td>
<td>E.L. Robinson</td>
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<tr>
<td>Alberts Spray Solutions LLC</td>
<td>Buckingham Doolittle &amp; Burroughs, LLP</td>
<td>Enerfab, Inc.</td>
</tr>
<tr>
<td>Alliance Petroleum Corporation</td>
<td>Burgess &amp; Niple</td>
<td>EnerVest Operating, LLC</td>
</tr>
<tr>
<td>American Road Machinery Co.</td>
<td>Burleson LLP</td>
<td>Enterprise Fleet Management</td>
</tr>
<tr>
<td>American Structurepoint, Inc.</td>
<td>Calfrac Well Services</td>
<td>E-Pak Manufacturing</td>
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<tr>
<td>American Water Management Services, LLC</td>
<td>Cameron Drilling Co., Inc.</td>
<td>ERM</td>
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<tr>
<td>Amerimar Realty Company</td>
<td>Canter Surveying GPS Services, Inc.</td>
<td>Ernst Conservation Seeds</td>
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<tr>
<td>Anderson Excavating, LLC</td>
<td>Canton Erectors Inc.</td>
<td>Eurofins Lancaster Laboratories, Inc.</td>
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<tr>
<td>Anderson Propane Services LLC</td>
<td>Carrizo Oil &amp; Gas, Inc.</td>
<td>Evans, Mechwart, Hambleton &amp; Titon, Inc.</td>
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<tr>
<td>Antero Resources</td>
<td>Century National Bank</td>
<td>Everflow Eastern Partners, L.P.</td>
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<td>APO Process Div APO Pumps &amp; Compressors</td>
<td>Chatham Associates</td>
<td>Evets Oil &amp; Gas Construction Services</td>
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<tr>
<td>Apple Mobile Leasing Inc.</td>
<td>Columbia Gas of Ohio, Inc.</td>
<td>Falco Energy</td>
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<td>Aqua Capital Ventures</td>
<td>CompManagement, Inc.</td>
<td>Fifth Third Bank</td>
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<tr>
<td>ARCADIS U.S. Inc.</td>
<td>Conestoga-Rovers &amp; Associates</td>
<td>Finn Corporation</td>
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<td>ARM Group</td>
<td>Consol Energy</td>
<td>FirstMerit Bank</td>
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<td>Array Products</td>
<td>Cox-Colvin &amp; Associates, Inc.</td>
<td>Fulbright &amp; Jaworski L.L.P.</td>
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<td>AultCare</td>
<td>Critchfield, Critchfield &amp; Johnston, Ltd.</td>
<td>GBQ Partners LLC</td>
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<td>AVT Inc.</td>
<td>CTL Engineering, Inc.</td>
<td>Graybar Electric</td>
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<tr>
<td>Baker &amp; Hostetler, LLP</td>
<td>D.A. Noit, Inc. of PA</td>
<td>Great Lakes Geophysical, Inc.</td>
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<tr>
<td>Bakerwell, Inc.</td>
<td>Dawood Engineering, Inc.</td>
<td>H &amp; H Enterprises</td>
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<td>Bass Energy, Inc.</td>
<td>Dewberry</td>
<td>Halcon Resources Corporation</td>
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<tr>
<td>BDI - Bearing Distributors, Inc.</td>
<td>Diversified Resources</td>
<td>Hall, Kistler &amp; Company</td>
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<tr>
<td>Benesch, Friedlander, Coplan &amp; Aronoff LLP</td>
<td>Dominion East Ohio</td>
<td>Halliburton</td>
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<tr>
<td>BL Companies, Inc.</td>
<td>Dorfman Production Co.</td>
<td>Harris Battery</td>
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<tr>
<td>Black McCuskey Souers &amp; Arbaugh, LPA</td>
<td>DTE Pipeline Company</td>
<td>Hillcorp Energy Company</td>
</tr>
<tr>
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<td>East Central Ohio Building &amp; Construction Trades Council</td>
<td>Holland Services</td>
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Hylant
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Industrial Torque Tools
Integrys Energy Services, Inc.
Interstate Gas Supply, Inc.
IPS Engineering
Iron Mountain Specialized, Inc.
Jackson Kelly PLLC
Jim Bourbeau Land Service, Inc.
JMW Trucking, Welding & Manufacturing
Jobes Henderson & Associates, Inc.
Joe Knows Energy
John Chance Land Surveys, Inc. (Fugro)
J.S. Paris Excavating, Inc.
K & L Gates LLP
Kegler, Brown, Hill & Ritter
Kelchner, Inc.
Keystone Insurers Group, Inc.
Kimble Companies
Kincaid, Taylor & Geyer
Kokosing Construction Co.
Krugliak, Wilkens, Griffiths & Daugherty
Kwest Group, LLC
Langan Engineering & Environmental Services
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Leff Electric
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LJ Stein & Company, Inc.
Local 66 IUOE
Loomis, Ewert, Parsley, Davis & Gotting, P.C.
LW Survey Co.
Lyden Oil Company
MacKenzie Land & Exploration, Ltd.
Marathon Petroleum Company
Maric Drilling Company
MarkWest Energy Partners, L.P.
Mason Producing, Inc.
McTech Corp
McFish, Kunkel & Associates
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MFC Drilling, Inc.
Mid-Ohio Pipeline Services
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Moore Well Services, Inc.
MS Consultants, Inc.
Nabors
NCL Natural Resources, LLC
Navarro & Wright Consulting Engineering, Inc.
Newpark Resources, Inc.
New Pig Corporation
Nicolozakes Trucking & Construction, Inc.
O’Brien & Gere
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Pipe-Valves, Inc.
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Plains All American
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Principle Energy Services
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Wheeling & Lake Erie Railroad Co.
William C. Abel & Associates
Winters & Lewis Excavating, Inc.
Young’s Environmental Cleanup, Inc.
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*Continued on the following page*
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NE Seismic Sales Manager
**Austin Powder Company**
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Cleveland, OH 44122
jay.walker@austinpowder.com

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Ohio Map of Utica Shale Activity

Provided By: MacKenzie Land & Exploration Ltd.
Ohio Oil & Gas Association Events

For the latest information on these and other events, including how to register, go to www.ooga.org

December

2013 Oilfield Expo
December 3-5, 2013
International Exhibition (IX) Center, Cleveland, OH

The OOGA Oilfield Expo is the largest event of its kind in the eastern United States. The I-X Center is an impressive facility, uniquely capable of housing the wide array of equipment and services deployed in the oilfield. Exhibit space has been expanded and refined, a Safety Congress component has been added, industry-specific training is being offered, completed with the Fall Technical Conference and Oilfield Symposium – bringing the decision makers, industry professionals, and suppliers together at one very impressive venue.

March

2014 OOGA Winter Meeting
March 5-7, 2014
Hilton Columbus at Easton

Industry Events

Contact Anne Carto at anne@ooga.org or Pete McKenzie at pete@ooga.org to submit an Industry Event to be included as a calendar item.

September

ADDC Annual Conference
September 25-29, 2013
Charleston, WV
www.addc.org

October

West Virginia Oil & Gas Expo
October 2, 2013
Morgantown, WV
www.wvoilandgasexpo.com

SOOGA Fall Clay Shoot
October 18, 2013
Whipple, OH
www.sooga.org

November

IOGA Fall Meeting
November 1, 2013
www.ioga.com

Mudrocks Symposium and Student Expo
Appalachian Geological Society & Eastern Section AAPG
November 2-4, 2013
Erickson Alumni Center in Morgantown, WV
www.geo.wvu.edu/~tcarr/AGS_ESAAPG/Registration.html

IOGANY Annual Meeting
November 5-7, 2013
Hyatt Regency Buffalo Hotel, Buffalo, NY
www.iogany.org
Bulletin Advertisers

The Ohio Oil & Gas Association would like to thank the following companies for their support through advertising in the Bulletin. Classified advertisements for these companies can be found on the pages indicated.

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Public Presentations/ Events Calendar

June 2013
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6 Stark County Minority Business Association Oil and Gas Forum
12 Toledo Refining Company Community Advisory Panel
12 - 13 Ohio Department of Education, Hands on Training (HOT) Conference
19 - 20 OOGEEP Teacher Workshop, Marietta College
21 Stark County K-12 Math/Science District Teacher Initiative
24 League of Women Voters of Darke County Oil and Gas Forum
27 Richland County Town Hall Meeting

July 2013
11 Mahoning Valley Shale and Energy Show
18 Cincinnati State Technical Community College Oil and Gas Forum
19 – 24 Ohio Fire Chiefs’ Association 2013 Annual Conference
30 Trumbull/ Mahoning/ Columbiana County School District Educational Forum
31 Ohio Department of Education 2013 Statewide Career Development Conference
31 - Aug. 1 OOGEEP Teacher Workshop, Mahoning County Career and Technical Center

August 2013
2 OOGEEP/Disney “Rocking in Ohio” at Ohio State Fair
8 Educators Development Program (EDP) Oil and Gas Forum
12 Green Library Oil and Gas Forum
14 Youngstown Oil and Gas Forum
15 Holmes County Liberty Coalition – Frack Nation Airing
15 8th Street Design District Association Oil and Gas Forum
16 Greenville City Council Oil and Gas Forum
22 Springfield Township Trustees Town Hall Meeting

September 2013
7 - 8 OOGEEP Oilfield Emergency Response Training Workshop
9 Niles City Council Oil and Gas Forum
9 OOGEEP/Disney “Rocking in Ohio” at Wayne County Fair
10 International Right of Way Association Oil and Gas Forum
12 Southeastern Ohio Oil and Gas Association Tradeshow
16 - 17 ANGA Natural Gas Utilization Summit
18 BWC Global Business Connection Conference
19 Darke County Mayor’s Association Meeting
20 2nd Annual Black Gold Ohio Summit
25 - 29 Desk & Derrick Club Convention

October 2013
1 OOGEEP/Disney “Rocking in Ohio” at Coshocton County Fair
8 Summit on Sustainability & the Environment
12 - 13 OOGEEP Oilfield Emergency Response Training Workshop
12 - 13 Wayne County Farm Tour
18 Delaware and Franklin Soil and Water Conservation District Teacher Workshop
23 Cambridge BWC Safety Council

November 2013
9 - 10 OOGEEP Oilfield Emergency Response Training Workshop
10 - 13 Ohio School Board Association Capital Conference and Trade
15 Cleveland Chemical and Allied Industries of Northwest Ohio Association
19 Career Technology Education Center (C-TEC) 2013 Career Fair
20 Professional Land Surveyors Association
25 Berlin Ellsworth Ruritan Club Oil and Gas Forum

December 2013
3 - 5 Ohio Oil and Gas Association Oilfield Expo
8 - 10 County Commissioners Association of Ohio/ County Engineers Association of Ohio Winter Conference
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Note: Oil prices only. Some postings do have transportation adjustments.
Crude Oil Prices
NYMEX v Ohio Wellhead Posted Prices
September 2012 – September 2013

Natural Gas Index Pricing
NYMEX Close & Appalachian Index
August 2012 – August 2013

Settle Price, Crude Oil
Light Sweet
New York Mercantile Exchange (NYMEX)
Sunday, September 15, 2013
$ per Bbl

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Settle Price, Natural Gas
New York Mercantile Exchange (NYMEX)
Sunday, September 15, 2013
$ per MMBtu’s

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2013 Gas Index Prices

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<td>August</td>
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<td>2.950</td>
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