

IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MARK YOUR CALENDAR

PAGE 7

MARK YOUR CALENDAR

LETTER FROM THE PRESIDENT

Greetings to The Coal Institute. I recently had the opportunity to participate in The Women's Mining Coalition (WMC) for a week on Capitol Hill. WMC is a grass roots organization that flies in to Washington, DC each spring to speak with Congressmen and Senators about the importance of mining and low cost electricity for our country.

We engaged these folks in dialogue around issues such as EPA's authority to veto mining permits, 404 permitting, the US's dependence on foreign sources of critical and strategic minerals, jurisdictional waters and the importance of coal in producing low cost, affordable energy. This was a great way for me to engage in these important discussions and I encourage you to share the ways you are engaging in Industry discussions with each other.

You will hear me and the rest of The Coal Institute Board of Directors refer to our Institute in the future as just that, The Coal Institute. While our heritage originated in North Carolina, we currently have members from at least 26 states and we wish to communicate our mission more broadly. We will be re-branding our communications accordingly. Global coal demand remains strong and preserving and promoting the worldwide coal industry, enriching coal knowledge, and inspiring coal support for the future will remain our vision.

Our Summer Trade Seminar is just around the corner. We have worked hard to integrate more extensive Industry related discussions in an updated format.

I look forward to seeing you all there!

Best Regards,

Barbara Coppola
President

2014 SPRING MEETING: POWERFUL SPEAKERS & A HUGE SUCCESS!!

The 2014 Spring Meeting was held once again at the Ballantyne in Charlotte, NC from April 2 – April 4, 2014. Along with an outstanding slate of Speakers, a new reception and dinner format was implemented. Wednesday's reception began with an assortment of passed heavy hors d'oeuvres including Crispy Duck Rolls, Maryland Crab Cakes and pulled barbeque sliders as well as an open bar. Dinner was plated with a choice of Beef Tenderloin, Scottish Salmon or Pork Tenderloin.

Our opening Speaker was the colorful, opinionated, passionate and insightful Robert E. Murray, President, CEO and Chairman of Murray Energy Corporation. His speech was titled "Today's Coal Industry the View from Murray Energy". Those in attendance heard a fantastic commentary from one of the coal industry's most recognized figures. Mr. Murray got everyone's attention right out of the gate while keeping our attention throughout the evening.

Folks Thursday morning was more of the same. Paul Vining, President, Alpha Natural Resources started off with "Adapting to the Evolving Landscape of CAPP". Paul was kind enough to be one of our Featured speakers even though he was on vacation. Joseph Czul, President, Logan & Kanawha Coal Company kept the energy going with his presentation regarding the coking coal marketplace. Then Sasha Weintraub, Vice President, Duke Energy Fuels & System Optimization shared the

(continued)



IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MEMBERSHIP UPDATE

PAGE 7

MARK YOUR CALENDAR

2014 SPRING MEETING: POWERFUL SPEAKERS & A HUGE SUCCESS!! (CONTINUED)

numerous things that Duke is working on currently and for the future while navigating a constantly changing landscape. Senator Joe Manchin of WV provided the Institute with a video address discussing the overzealous approach of the EPA regarding its current War on Coal (this should be called the War on America's hardworking middle class).

We had an interesting and enlightening panel discussion moderated by Jim Thompson, writer (and now moderator) extraordinaire. The panel discussion focused quite a bit on the new IHS CERA report. It appears that both coal and natural gas inventories are low. What will happen if coal inventories are not increased for the summer burn and natural gas inventories substantially increased for the winter surge in demand??? (Borrowing a phrase from Brooks and Dunn: You are going to miss me when I'm gone!!)

A BIG THANK YOU TO ALL OUR SPEAKERS! Thank you to the membership for such good attendance at this event.

SUMMER TRADE SEMINAR

Please make plans to join The Coal Institute at the Kingston Plantation in Myrtle Beach, SC for the 2014 Summer Trade Seminar (STS). The meeting schedule will open with a Fishing Tournament on Sunday, July 13th, 2014 with an 8:00 am start. Official registration for the conference will begin at the Poolside Social at 2:00 pm followed by the Norfolk Southern Welcome Reception at 6:00 pm.

On Monday morning July 14th, the business meeting will begin at 8:30 am followed by industry presentations from Ben Hatfield (Patriot Coal), Hans Daniels (Doyle Trading Consultants), Ryan Mills (Berman & Company), Greg Workman (Dominion), and Ginny Farrow (NRG) regarding future challenges and opportunities within the coal industry. We have also added a catered luncheon this year featuring speaker Jason Hayes from the American Coal Council who will provide an in-depth look at the current overall state of the coal industry. After the speaker presentation schedule concludes early afternoon, please bring your family and join us at 7:00 pm on the beach for a casual pizza party hosted by Patriot Coal Sales & River Trading.

The STS Golf Tournament will be held at Pine Lakes on Tuesday morning July 15th with a start time of 8:00 am. The summer meeting program will continue on Tuesday evening beginning with the CEDAR Awards Presentation at 5:30 pm followed by a presentation from our motivational speaker, Major Dan Rooney, USAF (retired). Mr. Rooney is a veteran F-16 fighter pilot who has completed three combat tours in Iraq, is a two-time recipient of the Top Gun award, was the motivational team speaker for the US Ryder Cup team in 2010, and now heads up his Folds of Honor Foundation which has awarded nearly 5500 scholarships worth over \$35 million to family members of servicemen and women who are killed or disabled in combat action. After Mr. Rooney's presentation, CSX will be hosting a reception beginning at 6:30 pm followed by the conclusion of the STS program with dinner, awards, door prizes, and musical entertainment beginning at 7:30 pm.

The Kingston Plantation can be reached for room reservations at (800) 876-0010. There are multiple accommodation options available including hotel suites and multi-bedroom condominiums with varying rates. Make sure you mention the NCCI or Group Code NCI when you reserve your room to assure you receive the conference rate.



IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MEMBERSHIP UPDATE

PAGE 7

MARK YOUR CALENDAR

SUMMERTIME BLUES

Summer is the season that we generally associate with family vacations, school breaks, weekend gatherings, camping and long days thinking about times past.

Doesn't matter what business you are employed, summer time is usually spent with family or wishing you were. Summer brings new beginnings for high school and college graduates. Parents adjust their lives accordingly, again, with the departure of their children into a world of adulthood. Parents hold on to the hope and trust that they have properly prepared their children with mostly love, and a firm guidance of simply the difference between right and wrong, self-respect and integrity.

As becoming a parent you only know what you were taught by your parents, elders or a special teacher during your educational training along the way. Yet we watch and our children grow physically and mentally from babies' held in our arms until they drive away from our home. It's the way life is supposed to go.

If a family is lucky enough our children prosper we are blessed with grandchildren and the cycle repeats itself.

Our coal industry, The Coal Institute, is a family, sometimes it may appear more of a dysfunctional family but it's a family. Some of our family members depart and new members arrive each year.

Summer time brings the blues but it also brings new beginnings.

The Coal Institute Family celebrates summer every year at Myrtle Beach, SC. The Institute attempts to educate our family about our coal industry and how families are impacted with coal and without coal. The Coal Institute promotes "family" in all aspects of its mission.

Attending the Summer Trade always helps soothe the "blues", encourages new beginnings and teaches us what is right and wrong. Warm sandy beaches, sunsets and family ... you only know it's still the coal business.

It's the way life is supposed to go.

Rick D. Meade

FRIENDS OF COAL: A SUCCESS STORY

By Bill Bissett

As it enters its twelfth year, the Friends of Coal campaign continues to grow not only in numbers of supporters, but also into new states where our logo becomes a fixture both in and beyond the coalfields.

How It Started

Developed originally in West Virginia in 2002, Friends of Coal began with a comment from Beckley coal operator Warren Hylton. In a discussion about how the coal industry might rally its supporters, Hylton said, "We have lots of friends out there. If we ask, I'd bet they would help us."

The next step was the employment of Charles Ryan Associates, an integrated marketing firm located in Charleston, West Virginia. Under the direction of the WV Coal Association, a logo, website, materials, and infrastructure were created to promote and support the campaign. Its growth was exponential, as the logo became a common sight across the Mountain State.

(continued)



IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MEMBERSHIP UPDATE

PAGE 7

MARK YOUR CALENDAR

FRIENDS OF COAL: A SUCCESS STORY (CONTINUED)

Specific highlights of the campaign's success in West Virginia includes the sponsorship of the Friends of Coal Bowl, which is the annual football game between Marshall University and West Virginia University (WVU), a gigantic car show in Beckley, the use of former Marshall and WVU football coaches Bobby Pruett and Don Nehlen to serve as spokespeople for the campaign, and a Friends of Coal license plate for personal vehicles.

The Move To Kentucky

Another highlight of the Friends of Coal campaign was its adoption in the neighboring state of Kentucky. Similar success was witnessed in Kentucky as the Kentucky Coal Association adopted the campaign's logo for its use. After the sponsorship of the Thunder Over Louisville fireworks display and concert that coincided with the 2007 Kentucky Derby, a large Friends of Coal rally was organized during the 2008 General Assembly in Frankfort to draw attention to legislation that was harmful to Kentucky's coal production. Thousands of supporters wearing shirts and carrying banners with the Friends of Coal logo made a loud statement in Kentucky's Capitol where the anti-coal legislation was ultimately defeated that year. "It was an impressive day for Kentucky coal," said David Moss, KCA's Vice President. "From politicians to the media, it was obvious there was a tremendous amount of support for our efforts and the coal miners of Kentucky."

In 2009, the Friends of Coal license plate was launched in Kentucky. In three years, more than 55,000 personal vehicles display this distinctive plate, along with nearly two thousand motorcycles. At the announcement of the new license plate, Kentucky Governor Steve Beshear spoke about the importance of coal to the Commonwealth's economy. "Kentucky owes a lot to coal," Governor Beshear said. "Coal creates over 17,000 jobs, 90-plus percent of our electricity and more than a billion dollars in direct wages. The Friends of Coal specialty plate gives drivers in the Bluegrass a chance to show their appreciation for the mineral and those who mine it."



The Big Tent

It is important to remember that Friends of Coal is not a public education campaign. Its primary purpose is to gather people who work within the coal industry or related companies, family members of these workers, or individuals who feel an affinity to the coal industry or its important connection

to our economy. In this way, the Friends of Coal acts as a "Big Tent", to use a political term, to allow our supporters to work under a common banner and logo, and also be identified as supporters. For too long, the coal industry has been perceived a business ran by a small group of people from out-of-state who have little connection to West Virginia or Kentucky. The success of Friends of Coal in both states negates this perception and shows the overwhelming support that was there before, but not identified.

Beyond identification, Friends of Coal also creates a network of information that allows us to share information and opportunities with identified Friends. Using inexpensive E-mail blasts, state coal associations have invited fellow Friends to attend public hearings and rallies, such as the rally and U.S. Environmental Protection Agency (EPA) hearing in Frankfort, Kentucky on June 5, 2012. Nearly two thousand pro-coal supporters, many of whom were wearing Friends of Coal shirts, attended the rally and hearing afterwards, which clearly demonstrated support of our coal production over the current



(continued)



IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MEMBERSHIP UPDATE

PAGE 7

MARK YOUR CALENDAR



FRIENDS OF COAL: A SUCCESS STORY (CONTINUED)

actions of the EPA or the anti-coal activists in attendance. To have an event more than two hours from our Eastern Coalfield was an impressive win for Kentucky's coal industry.

The Future

Friends of Coal has tremendous growth potential. We have been contacted by other states interested in starting similar campaigns and are assisting in any way possible. While there needs to be a coordinating group, such as a state coal association, to make certain that the campaign is professional in nature, it would be expected that the logo would be well accepted in other coal-producing states. If you would like to know more information about the Friends of Coal, please contact either:

Kentucky Coal Association

859.233.4743

West Virginia Coal Association

304.342.4153.

Bill Bissett is the President of the Kentucky Coal Association. He formerly served as Chief of Staff/Senior VP for Communications of his Alma Mater, Marshall University. He also was instrumental in the establishment of the Friends of Coal campaign in West Virginia.

SCHOLARSHIP UPDATE

Earlier this month, The Coal Institute distributed checks totaling \$78,000 to eleven colleges and universities as part of our Educational Funding Program. The University of South Carolina, West Virginia University and the University of Kentucky each received \$5,000 checks and eight \$3,500 checks were sent to two-year community and technical colleges. The revenue for this, as well as our contributions to CEDAR and Challenger Learning Center, come from our membership dues, golf hole sponsorships, mulligan sales and raffle ticket sales.

This month we want to recognize a student from Rend Lake Community College in Rend Lake IL, **Drake Curry**. Drake received the 2013-2014 Coal Institute scholarship at Rend Lake and just completed his freshman year. Drake's family is involved in coal mining in Illinois and he plans to begin his career in coal mining when he completes his Associate's Degree in Mining Technology in May 2015. We received a letter from Shawna Manion, CEO of the Rend Lake College Foundation, and she advised that Drake would not have been able to attend college this past year if not for the Coal Institute scholarship, and as a "strong B" student, he is taking full advantage of this opportunity.



The Coal Institute should take pride in helping these young people get their education and prepare themselves to enjoy a career in the coal industry.

THE COAL INSTITUTE SPONSORSHIP OPPORTUNITIES

Myrtle Beach here we come! I am excited and looking forward to the 2014 The Coal Institute Summer Trade Seminar. You may know that in addition to our full lineup of energy industry speakers, we will have Major Dan Rooney as our motivational speaker. We are looking for sponsors for Mr. Rooney's presentation, as well as for the Sunday Poolside Reception, Lunch, Coffee Service, and General

(continued)

IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MEMBERSHIP UPDATE

PAGE 7

MARK YOUR CALENDAR

THE COAL INSTITUTE SPONSORSHIP OPPORTUNITIES (CONTINUED)

Sponsorships. As always, we greatly appreciate your past support of The Coal Institute sponsorship and hope we can count on your continued generosity as we go forward in this challenging business climate. Let me know if you have any questions about the sponsorship opportunities.

If any of you have any ideas on how to improve the The Coal Institute's sponsorship service to our membership, please do not hesitate to let me know. I look forward to seeing each of you at the The Coal Institute Summer Trade Seminar in Myrtle Beach. If you are a prospective member who is considering joining the The Coal Institute, come talk to us and let us show you why it makes sense for your company to become an The Coal Institute member.

Tim Carr

Sponsorship Chairman

MEMBERSHIP UPDATE

We are pleased to report that we approved four new members during the Spring Meeting (Central Electric Power Cooperative, Clean Coal Solutions, KopperGlo Mining and Reference Services). The Coal Institute currently has 158 members. This is slightly down from the mid-160 range we had during the 2006 through 2008 timeframe, however, it is still a very respectable number given the many consolidations in the industry and the significant challenges our industry has been facing. We are very thankful for our continued strong membership base! However, there are still a couple of areas for improvement:

1. Unfortunately, the annual membership dues have not been received from 35 of our members so we would really like to receive those dues payments as soon as possible
2. We have a very strong desire to continue to grow our membership and we encourage you to please contact anyone on the Membership Committee <http://www.thecoalinstitute.org/committees> if you are aware of a company who may be interested in joining or have any ideas regarding how we can better expand our membership.

As our members know, Membership Has Its Privileges:

- » From a purely financial standpoint, becoming a member enables your company to obtain significant discounts on our meeting fees which are already some of the lowest in the industry. For example, for a company that typically sends two representatives to each meeting, the discounted meeting fees more than offset the cost of the annual membership dues after the attendance of as few as two meetings. For companies who send more than two representatives, the payback is even quicker.
- » Your company and its representatives will be included in our membership directory which provides a tremendous networking and advertising value.
- » The Coal Institute is a non-profit organization and all of your membership dues are used to directly support coal education efforts.

Jeff Lamb



IN THIS ISSUE

PAGE 1

LETTER FROM THE PRESIDENT
SPRING 2014 MEETING RECAP

PAGE 2

SPRING 2014 MEETING RECAP (CONT.)
SUMMER TRADE SEMINAR

PAGE 3

SUMMERTIME BLUES
FRIENDS OF COAL: A SUCCESS STORY

PAGE 4

FRIENDS OF COAL (CONT.)

PAGE 5

FRIENDS OF COAL (CONT.)
SCHOLARSHIP UPDATE
SPONSORSHIP OPPORTUNITIES

PAGE 6

SPONSORSHIP OPPORTUNITIES (CONT.)
MEMBERSHIP UPDATE

PAGE 7

MARK YOUR CALENDAR

MARK YOUR CALENDAR

2014

October 21-23 **Fall Meeting**
Mid Pines Resort, Southern Pines, NC
Tel: 910.692.2114

2015

April 15-16 **Spring Meeting**
The Ballantyne Hotel, Charlotte, NC
Tel: 704.248.4020

EDITOR'S NOTE

Coal Matters welcomes member comments or observations about our coal industry. Feel free to email **Ed Spiker** at espiker@oxfordresources.com for inclusion in a future edition of *Coal Matters*.

Please direct any comments, questions or concerns about *Coal Matters* to either:

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