



DRILLER

DEPA REPORT ON INDUSTRY, LEADERSHIP, LEGISLATION AND ENERGY REGULATION

ONE BIG BEAUTIFUL BILL ACT PASSES
WHAT IT MEANS FOR DOMESTIC OIL & GAS PRODUCERS

On May 22, 2025, the U.S. House of Representatives narrowly passed the "One Big Beautiful Bill Act" (OBBBA), a sweeping budget reconciliation package that marks a significant shift in federal energy policy. The legislation, which passed by a 215–214 vote, aims to bolster domestic fossil fuel production, particularly benefiting onshore oil and gas producers.

Key Provisions Impacting Oil and Gas Producers

1. **Mandatory Lease Sales:** The bill mandates quarterly onshore oil and gas lease sales, ensuring consistent opportunities for producers to access federal lands. This provision is designed to streamline the leasing process and reduce bureaucratic delays.
2. **Reduced Royalty Rates:** The legislation lowers the royalty rate for onshore oil and gas leases on federal lands from 16.67% to 12.5%, reverting to rates established nearly a century ago. This reduction aims to incentivize increased production by lowering operational costs for producers.
3. **Expedited Permitting Processes:** The bill introduces measures to expedite the Application for Permit to Drill (APD) process, including extending APD terms from

two to four years and implementing an "APD by Rule" provision to streamline approvals.

4. **Noncompetitive Leasing Reinstated:** The legislation restores the Bureau of Land Management's ability to issue noncompetitive leases for parcels that receive no bids during competitive auctions, providing additional avenues for producers to acquire drilling rights. (
5. **NEPA Reforms:** To accelerate project approvals, the bill allows companies to fund their own National Environmental Policy Act (NEPA) analyses, potentially reducing the time and cost associated with environmental reviews.

Implications for Domestic Energy Production

The OBBBA represents a significant policy shift favoring fossil fuel development. By reducing financial and regulatory burdens, the bill aims to stimulate increased domestic oil and gas production, potentially enhancing energy independence and economic growth in energy-producing regions

However, the bill's future remains uncertain as it moves to the Senate, where it may face opposition or require modifications. Stakeholders across the energy sector will be closely monitoring the legislative process to assess the final impact of these provisions on domestic energy production.

“The passage of this reconciliation bill is a major victory for domestic energy producers and a clear signal that Congress is listening to the concerns of hardworking American oil and gas operators. During DEPA’s annual DC Fly-In just days ago, our members met directly with lawmakers as negotiations were unfolding in real time. We’re grateful to the many members of Congress who stepped away from intense discussions to keep us informed and engaged. This legislation addresses long-standing challenges in leasing, permitting, and regulatory overreach—giving independent producers the certainty they need to keep America powered and energy secure.” - Jerry Simmons, DEPA CEO/President



DEPA DC FLY-IN AND BOARD MEETING

MAY 20 & 21

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DEPA believes in seeking common ground, through common sense solutions, to the challenges facing our industry. Our bipartisan approach provides a uniquely powerful voice for our members at the state and national level.

*Our work is critical.
Your support is vital.*

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96th Annual Meeting June 17-19, 2025 Williamsburg Virginia

The IPAA 96th Annual Meeting, is where connections are forged, innovation thrives, and discussions with prominent national speakers, policymakers, and industry leaders take center stage. This year, immerse yourself in the historic charm of Colonial Williamsburg, a living history museum that brings the 18th century to life. Stay at the Williamsburg Lodge, where timeless comfort meets convenience. Its prime location—just steps from the Colonial Williamsburg Historic Area—places you at the heart of America’s story. Stroll through cobblestone streets, explore vibrant taverns, and visit historic sites, all within walking distance of your room. After a day of discovery, unwind with the Lodge’s exceptional amenities. Rejuvenate at the spa, savor traditional Southern cuisine, or tee off at the renowned Golden Horseshoe Golf Club, one of the country’s top courses. Whether you’re looking for a family-friendly atmosphere or a romantic getaway, the Lodge offers it all—including childcare options for your convenience. As you explore, let the Colonial Williamsburg mission, “That the future may learn from the past,” inspire your journey. Join us for an unforgettable experience of history, comfort, and connection!



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SENATOR JOE MANCHIN**

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[For agenda information and other details](#)

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For questions contact Beth Stockner bstockner@ipaa.org



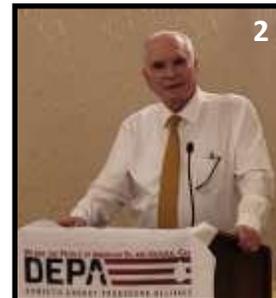
DEPA ANNUAL DC FLY-IN AND BOARD MEETING



LEFT,
Sen. James Lankford (OK)

RIGHT,

- 1) Rep. Bruce Westerman (AR)
- 2) Rep. Mike Kelly (PA)
- 3) Rep. Julie Fedorchak (ND)
- 4) Rep. Pete Stauber (MN)
- 5) Abbie Tardif ,
EPA Ofc of Air and
Radiation Principal Dep
Assistant Admin.
- 6) Rep. Bob Latta (OH)
- 7) Rep. August Pfluger (TX)



Our DC Fly-In on May 20–21 brought DEPA members face-to-face with key members of Congress during a critical moment on Capitol Hill. While we were in Washington, lawmakers were preparing for a vote on the reconciliation bill scheduled for May 22. That timing gave our group a unique opportunity to speak with elected officials as they were actively engaged in final negotiations.

We heard firsthand how the process was unfolding—directly from the people in the room. These real-time conversations allowed us to reinforce the importance of American energy producers and the need for policies that protect and support our industry.

Scroll through the photos below to see highlights from the conversations and briefings that made this Fly-In one of our most impactful yet.



DEPA Emerging Leaders 2025 with Senator James Lankford

DEPA's Emerging Leaders Make Their Mark in D.C.

First Cohort Joins Policy Conversations on Capitol Hill

The future of American energy is bright—and it just walked the halls of Congress.

This month, the inaugural class of Emerging Leaders was welcomed to Washington, D.C., for a series of impactful meetings with members of Congress on and off Capitol Hill. This new program, designed to spotlight and support the next generation of oil and gas professionals, is already proving to be a vital link between rising industry talent and national energy policy.

Each Emerging Leader was nominated by a peer, supervisor, or mentor in the industry who recognized their exceptional promise, leadership ability, and deep commitment to the future of domestic energy. These young professionals represent a broad range of expertise—from field operations to engineering, land and legal, business development, and public affairs—but share one important quality: a belief in the critical role American oil and gas plays in our economy, security, and way of life.

During their time in D.C., the cohort participated in exclusive discussions with congressional staff and members of Congress, offering insights from the field and learning firsthand how policy decisions are made. They also received a special recognition trophy commemorating their selection and commitment to the industry.

"These conversations were not just symbolic," said Jerry Simmons, DEPA CEO/President. "They were substantive, thoughtful exchanges between tomorrow's leaders and today's lawmakers. Our goal is to build a bridge—not just for this cohort, but for every emerging leader who follows."

The Emerging Leaders program was created to empower and elevate the next generation of energy advocates, ensuring that their voices help shape the future of U.S. energy policy. In the coming months, this group will continue its engagement through mentorship opportunities, board meeting observations, and additional events focused on leadership development.

This first cohort marks the beginning of something powerful: a growing network of young professionals prepared to lead, advocate, and defend the American energy story for decades to come.

DEPA'S 2024 / 2025 EMERGING LEADERS



BRADY PELTON
VP GENERAL COUNSEL
ND PETROLEUM COUNCIL



GRACE PRINCE
PERMIAN BASIN
PRODUCTION MANAGER
CONTINENTAL
RESOURCES



JACQUES WHITE
CHIEF OPERATING OFFICER
ROLLAND
RESOURCES



ELIZABETH PARKER
VP BUSINESS
DEVELOPMENT AND PLANNING
BIRCH RESOURCES



JEREMIAH ANDERSON
COMPLETIONS
MANAGER
CONTINENTAL
RESOURCES



ADAM DeLANEY
ENGINEER II,
ENVIRONMENTAL
CONTINENTAL
RESOURCES



THAD DUNHAM
SR. DIRECTOR
GOVT & INDUSTRY AFFAIRS
INTERNAT'L ASSOC
OF DRILLING
CONTRACTORS



C. OLIVIA SIMONSON
LEGAL &
COMMUNICATIONS
CALIFORNIA NATURAL
RESOURCES GROUP



SARAH HALE
MANAGER
WILLISTON BASIN
RESOURCE DEVELOPMENT
CONTINENTAL
RESOURCES



TRUMP ADMINISTRATION SIGNALS STRONG ENERGY DIPLOMACY WITH AFRICA

GOOD NEWS FOR U.S. OIL & GAS EXPORTERS

At the recent Powering Africa Summit in Washington, D.C., U.S. Secretary of Energy Chris Wright, speaking on behalf of the Trump administration, delivered a powerful and unapologetic endorsement of practical, pro-growth energy development across the African continent — a message that resonates strongly with U.S. oil and gas producers, midstream companies, and exporters.

Energy as Human Opportunity — Not Ideology

“The only goal of energy is to expand human opportunity,” Wright stated. “Make us live longer. Healthier. More opportunities for us and our kids... Africa needs massively more energy. Africans will do that. Africans will deliver that. The United States is thrilled to partner with you in that endeavor.”

Wright emphasized that the U.S. will not impose restrictions on what types of energy Africa chooses to pursue. “There’s no technology I don’t like,” he said — a clear signal that oil, gas, LNG, and other conventional fuels remain not only welcome but critical to solving global energy poverty.

A Pro-Business, Bottom-Up Strategy

Wright laid out a vision that embraces entrepreneurialism, U.S. private sector engagement, and capital investment without the burdens of centralized, ideological planning. “We’re not going to decide what you want. You decide what you want... We want to be your partners in technology and providing capital.”

This signals a shift from the Biden administration’s previous focus on restricting financing for fossil-based international

energy projects — a policy that limited American companies’ ability to compete globally and drew criticism from energy producers and developing nations alike.

A Return to Energy Realism

Leaders from across Africa, including Nigeria’s Minister of Power Adebayo Adelabu, welcomed the renewed U.S. engagement. He praised previous Power Africa initiatives and underscored the importance of strong U.S.-Africa collaboration to unlock private investment, stabilize infrastructure, and deliver real results.

Sun Africa CEO Adam Cortese called for cutting through bureaucratic red tape and prioritizing “power plants that come online as quickly as possible.” His comments echo a growing recognition that U.S. energy independence and technological know-how are part of the solution — not the problem.

What It Means for U.S. Oil, Gas, and Infrastructure Companies

The Trump administration’s message is clear: **American energy is back on the global stage**, and U.S. oil and gas producers are welcome partners in Africa’s economic rise. With an all-of-the-above approach, no off-limits technologies, and support for export-oriented investment, this is an open invitation for U.S. companies to lead in delivering affordable, scalable, and timely energy solutions abroad.

The industry should prepare for expanded export markets, infrastructure partnerships, and international energy diplomacy grounded in mutual prosperity and strategic cooperation.



US SECRETARY OF ENERGY
CHRIS WRIGHT



MINISTER OF POWER,
CHIEF ADEBAYO ADELABU

BETTERING HUMAN LIVES FOUNDATION — FORMED BY CHRIS WRIGHT IN 2023, AS CEO OF LIBERTY ENERGY

Well before his political career, Chris Wright was putting his money where his mouth is and created a foundation to battle energy poverty and save lives. The Bettering Human Lives foundation is offering a pathway to prosperity. From their [website](#) “Our Pathway to Prosperity starts off by offering much needed, catalytic funding to local small businesses and entrepreneurs working across the clean cooking value chain, enabling them to innovate, expand, and grow. This economic development approach leads to sustained increases in access to clean cooking, which, in turn, uplifts the well-being of women, children, and communities. We sustain this cycle through ongoing reinvestment, ensuring a brighter future for all.”

DEMOCRATIC SENATORS WARN AGAINST OVERRULING PARLIAMENTARIAN ON CRA RESOLUTION— WE STRONGLY DISAGREE

May 1 several Democratic members of Congress sent a sharply worded letter cautioning against efforts to overrule the Senate Parliamentarian's recent decision that a joint resolution of disapproval regarding three EPA Clean Air Act preemption waivers granted to California is not entitled to expedited procedures under the Congressional Review Act (CRA). The lawmakers argue that doing so would set a dangerous procedural precedent and undermine the Senate's institutional integrity.

Our organization disagrees with both the tone and substance of this letter—and believes that the Parliamentarian's decision should, in fact, be challenged. Here's why:

1. EPA's California Waivers Are De Facto Rules with Nationwide Impacts

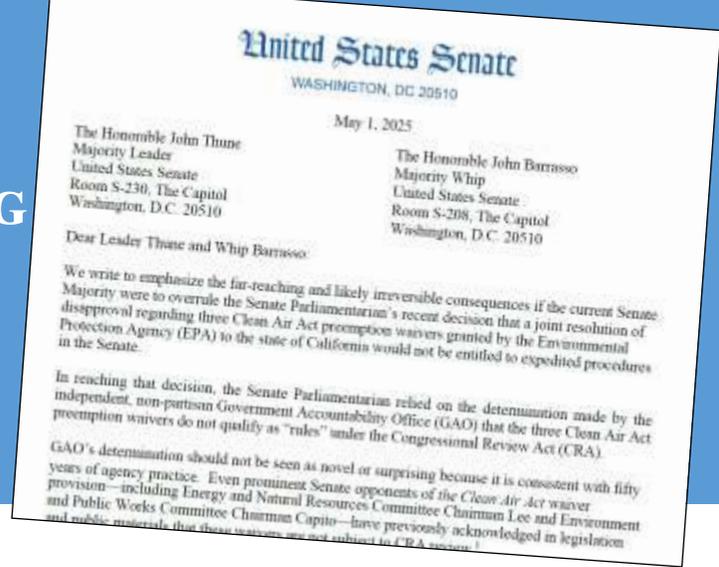
At issue are the EPA's decisions to allow California to enforce its own, more stringent emissions standards under the Clean Air Act—standards that increasingly shape national policy. These waivers, while granted to a single state, affect the entire auto and energy sector, pressuring manufacturers and regulators across the country to comply with California's mandates. These are not routine state exceptions; they are de facto rules that influence fuel composition, vehicle technology, and energy development across state lines.

Under the CRA, Congress has the authority to review and disapprove "rules" with broad policy implications. That is exactly what these waivers represent in practice—regulatory decisions with significant, national consequences. Relying on narrow technical definitions to exempt them from review undermines Congressional oversight over far-reaching administrative actions.

2. The CRA Was Created to Check Regulatory Overreach

The CRA was specifically designed to allow Congress to rein in overreaching or controversial agency actions—especially when such actions bypass the legislative process. Whether the GAO finds that these waivers technically qualify as "rules" is beside the point: the spirit and intent of the CRA is to prevent regulatory fiat from replacing representative lawmaking.

By shielding EPA's waiver decisions from CRA review, we



risk normalizing the practice of circumventing Congressional scrutiny through creative legal framing. If these decisions aren't subject to CRA oversight now, what's to stop a future agency from cloaking other sweeping policies in similar exemptions?

3. Institutional Precedent Should Not Override Accountability

The letter characterizes the effort to overrule the Parliamentarian as a "procedural nuclear option," but the real threat to institutional norms is allowing executive agencies to operate without accountability. Precedent should serve the institution—not be used as a shield against legitimate oversight. The Senate has mechanisms in place to correct flawed procedural decisions when broader democratic accountability is at stake.

Furthermore, this is not a question of political convenience. It's a question of whether Congress will retain its rightful role as a check on executive power, particularly when that power is used to implement policies with immense economic, technological, and environmental consequences.

4. Energy Producers Deserve a Say in National Policy

The oil and gas industry—and all sectors affected by transportation and fuel policy—have a direct stake in how emissions standards are implemented. When unelected bureaucrats can effectively dictate national policy via state-level waivers, without public comment or legislative oversight, producers are left with policy uncertainty, regulatory whiplash, and diminished competitiveness.

Congress should embrace its responsibility to scrutinize these waivers under the CRA. That requires overruling the Parliamentarian's narrow interpretation—because the stakes are too high to ignore.

Our organization stands firmly in favor of efforts to bring these waivers under CRA review. If the Senate Majority is serious about protecting the balance of powers, regulatory accountability, and the industries that keep America moving, it should act decisively to challenge this decision and reaffirm Congressional authority.

THE LETTER SENT TO THUNE AND BARRASSO BY 20 DEMOCRATIC SENATORS

We write to emphasize the far-reaching and likely irreversible consequences if the current Senate Majority were to overrule the Senate Parliamentarian’s recent decision that a joint resolution of disapproval regarding three Clean Air Act preemption waivers granted by the Environmental Protection Agency (EPA) to the state of California would not be entitled to expedited procedures in the Senate.

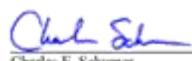
In reaching that decision, the Senate Parliamentarian relied on the determination made by the independent, non-partisan Government Accountability Office (GAO) that the three Clean Air Act preemption waivers do not qualify as “rules” under the Congressional Review Act (CRA).

GAO’s determination should not be seen as novel or surprising because it is consistent with fifty years of agency practice. Even prominent Senate opponents of the Clean Air Act waiver provision—including Energy and Natural Resources Committee Chairman Lee and Environment and Public Works Committee Chairman Capito—have previously acknowledged in legislation and public materials that these waivers are not subject to CRA review.

We, however, do not write to relitigate the determination by GAO or the question already decided by the Parliamentarian. Both parties have been on the losing end of decisions by the Parliamentarian. We ourselves were on the losing end of several decisions by the Parliamentarian during the 117th Congress. But we did not attempt to overrule these decisions, even though we did not agree with them.

Now, we understand that some may be considering overruling the Parliamentarian’s decision. While that might be more expedient than agency rulemaking³ or considering legislation under the Senate’s normal rules, such an action would be a procedural nuclear option—a dramatic break from Senate precedent with profound institutional consequences. If the current Senate Majority were to open this door, the CRA could be weaponized to retroactively invalidate decades of agency actions—including adjudications, permits, and licensing decisions that were never previously considered “rules”—and effectively hijack the Senate floor.

In addition, if efforts to invalidate such actions were successful, future administrations would face significant obstacles utilizing the underlying authorities for any arguably similar actions, given the plain text of the CRA. Most importantly, however, once that precedent is set, a future Senate Majority could subsequently apply it to legislation beyond the CRA. Put bluntly, there is no cabining a decision to overrule the Parliamentarian. We therefore urge you to weigh these issues carefully—with full knowledge of the consequences—should you consider whether to overrule the Parliamentarian regarding a CRA resolution disapproving the Clean Air Act preemption waivers.


Charles E. Schumer
United States Senator
Minority Leader


Alex Padilla
United States Senator
Ranking Member, Committee
on Rules and Administration


Sheldon Whitehouse
United States Senator
Ranking Member, Senate
Committee on Environment
& Public Works


Richard J. Durbin
United States Senator
Ranking Member, Senate
Committee on the Judiciary


Patty Murray
United States Senator
Vice Chair, Senate Committee
on Appropriations


Jeffery D. Merkley
United States Senator
Ranking Member, Committee
on Budget


Maria Cantwell
United States Senator
Ranking Member, Committee
on Commerce, Science, and
Transportation


Christopher A. Coons
United States Senator


Ron Wyden
United States Senator
Ranking Member, Committee
on Finance


Brian Schatz
United States Senator
Vice Chairman, Committee
on Indian Affairs


Jeanne Shaheen
United States Senator
Ranking Member, Senate
Foreign Relations Committee


Edward J. Markey
United States Senator
Ranking Member, Committee
on Small Business
and Entrepreneurship

CC: The Honorable John Boozman
The Honorable Shelley Moore Capito
The Honorable Bill Cassidy
The Honorable Susan Collins
The Honorable Tom Cotton
The Honorable Mike Crapo
The Honorable Ted Cruz
The Honorable Joni Ernst
The Honorable Lindsey Graham
The Honorable Chuck Grassley
The Honorable James Lankford
The Honorable Mike Lee
The Honorable Mitch McConnell
The Honorable Jerry Moran
The Honorable Lisa Murkowski
The Honorable Rand Paul
The Honorable James Risch
The Honorable Eric Schmitt
The Honorable Rick Scott
The Honorable Tim Scott
The Honorable Roger Wicker


Jack Reed
United States Senator
Ranking Member, Committee
on Armed Services


Mark R. Warner
United States Senator
Vice Chairman, Select
Committee on Intelligence


Kirsten Gillibrand
United States Senator
Ranking Member, Special
Committee on Aging


Richard Blumenthal
United States Senator
Ranking Member, Senate
Committee on Veterans’
Affairs


Amy Klobuchar
United States Senator
Ranking Member, Committee on
Agriculture, Nutrition, and
Forestry


Martin Heinrich
United States Senator
Ranking Member, Committee
on Energy and Natural
Resources


Elizabeth Warren
United States Senator
Ranking Member, Committee
on Banking, Housing, and
Urban Affairs


Maggie Hassan
United States Senator
Ranking Member, Joint
Economic Committee

Notable reactions from members of congress regarding the recent decision to overrule the Senate Parliamentarian on the applicability of the CRA to California's Clean Air Act waivers:

**Senator John Thune (R-SD),
Senate Majority Leader**

"California's waivers are not just state-level decisions; they have nationwide implications. Overruling the Parliamentarian is necessary to ensure that such impactful regulations undergo proper Congressional scrutiny."

Senator Shelley Moore Capito (R-WV), Ranking Member of the Senate Environment and Public Works Committee

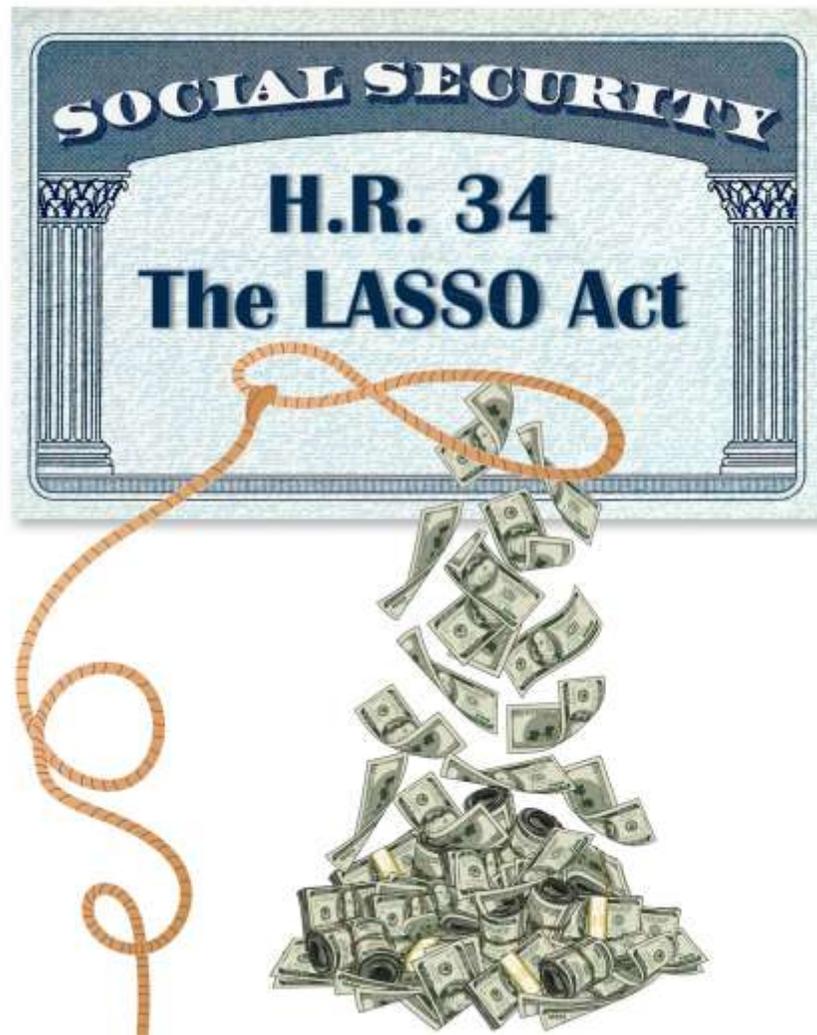
"Granting California these waivers effectively allows one state to dictate national policy. It's imperative that we challenge this overreach to protect our economy and energy independence."

Senator Mike Lee (R-UT)

"The Clean Air Act was never intended to let California set emissions standards for the entire country. Overruling the Parliamentarian aligns with restoring the balance of power and ensuring that federal regulations serve all states equally."

Representative Cathy McMorris Rodgers (R-WA), Chair of the House Energy and Commerce Committee

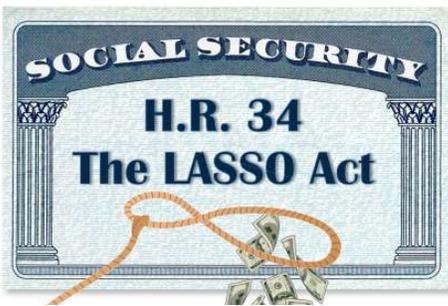
"California's push for stringent emissions standards undercuts consumer choice and places undue burdens on industries. It's time we reassert Congressional authority and prevent a single state from imposing its will nationally."



In the first week of May DEPA proudly announced its full support for H.R. 34, the *Land and Social Security Optimization (LASSO) Act*, introduced by Congressman Paul Gosar. This forward-looking legislation offers a commonsense solution to two urgent national priorities: ensuring the solvency of Social Security and expanding responsible energy development on America's federal lands.

The LASSO Act requires that **10 percent of all revenue generated from lands managed by the Department of the Interior and the U.S. Forest Service—including submerged lands on the Outer Continental Shelf—be deposited directly into the Federal Old-Age and Survivors Insurance (OASI) Trust Fund**. This trust fund is the primary Social Security fund that pays benefits to retired workers and their families.

“This is exactly the type of smart, pro-growth policy our country needs,” said DEPA President and CEO **Jerry Simmons**. “The LASSO Act harnesses the economic potential of our public lands to help secure the



future of Social Security. By linking domestic resource development to retirement security, this bill creates powerful incentives to support American energy production and ensure our seniors get the benefits they’ve earned.”

FUNDING SOCIAL SECURITY THROUGH AMERICAN RESOURCES

Without action, the OASI Trust Fund faces an estimated depletion by **2033**, at which point the government would only be able to pay out **approximately 77%** of scheduled benefits. The **FY 2023 shortfall alone was \$70.4 billion**.

Under H.R. 34, public lands—including onshore and offshore oil and gas operations, mineral development, timber harvesting, and grazing—would contribute directly to closing that gap. In fact, if the bill had been enacted in FY 2023, **at least \$2 billion** could have been deposited into the trust fund from existing royalties and receipts.

According to the Congressional Budget Office, the LASSO Act is projected to **add \$15 billion to the OASI Trust Fund over the next decade**, bolstering the retirement benefits of millions of Americans without raising taxes or cutting benefits.

REDIRECTING ROYALTIES FOR THE PUBLIC GOOD

Currently, most royalties and revenues from federal land development are deposited into the U.S. Treasury’s general fund, where they are spent without any specific connection to public programs. The LASSO Act reimagines this model by **directing a portion of these funds to serve a tangible, high-priority public purpose: safeguarding Social Security**.

This bill not only supports retirees—it also promotes American energy independence and economic development. As energy producers face increasing regulatory burdens and politically motivated land withdrawals, H.R. 34 provides a strong counterbalance by rewarding productive use of federal lands.

A CLEAR PATH FORWARD

The LASSO Act disincentivizes excessive federal land withdrawals—such as the Biden administration’s removal of **625 million acres of federal waters from future oil and gas leasing**—and instead champions policies that generate revenue, energy, and jobs.

“We believe in the power of responsible resource development to improve lives,” Simmons added. “From the oil fields of Texas to the offshore platforms in the Gulf, America’s energy producers stand ready to deliver value to the American people—not just through reliable energy, but through direct contributions to critical programs like Social Security.”

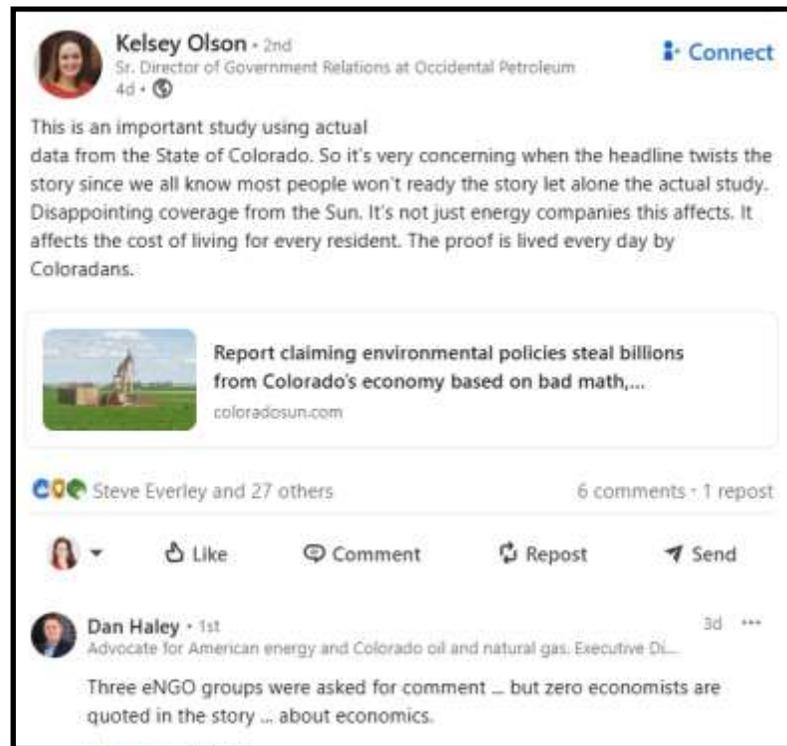
DEPA urges Congress to act swiftly on H.R. 34 to preserve Social Security, promote energy security, and restore balance to the management of our public lands.

THE PRICE OF POLICY: NEW STUDY REVEALS \$32 BILLION ECONOMIC TOLL FROM COLORADO'S ENVIRONMENTAL AGENDA

A new report by the Common Sense Institute (CSI) underscores what many oil and gas professionals in Colorado have long known: the state's aggressive environmental agenda carries significant economic consequences. Since 2009, more than 100 major environmental mandates have been added to Colorado's laws—policies that, according to CSI's analysis, have cost the state \$32 billion in economic output and nearly 31,000 jobs.

From shuttering coal-fired power plants to restricting new oil and gas development, these regulations have hit energy workers and businesses hard. Industries across the board—coal mining, transportation, power generation, and oil and gas production—have experienced job losses and increased compliance costs. Companies report devoting more time and resources than ever before to navigating a maze of regulations rather than focusing on innovation and productivity.

CSI's executive director, Kelly Caufield, emphasized the need for a more balanced conversation: "These impacts have to be taken seriously and openly debated. Policymakers and the public deserve a clear picture of both the benefits and the costs before major environmental rules are enacted."



This study is a sobering reminder: energy policy doesn't operate in a vacuum. It has ripple effects across communities, job markets, and household budgets. If the public isn't fully informed about the tradeoffs involved, then our policy decisions are neither democratic nor sustainable.

Unfortunately, that balanced conversation is often lacking. The Colorado Energy Office and allied environmental groups quickly dismissed the CSI report, calling it simplistic or misleading. Yet their rebuttals often rely on idealized projections rather than hard economic realities. While regulators tout net benefits based on assumed future fuel savings or healthcare reductions, many of those assumptions fail to reflect the lived experiences of Colorado families and workers.

As one Colorado professional pointed out on LinkedIn, "This is an important study using actual data from the State of Colorado. So it's very concerning when the headline twists the story... It's not just energy companies this affects. It affects the cost of living for every resident. The proof is lived every day by Coloradans."

Indeed, many Coloradans have seen higher utility bills, job displacement, and rising costs of living—consequences conveniently excluded from state agency impact assessments. While environmental advocates blame fossil fuel volatility for rate

hikes, they fail to acknowledge the significant role that state mandates and infrastructure transition costs play in shaping the monthly bills that Coloradans receive.

Critics argue that the CSI report cherry-picks data, yet they ignore the complexity and uncertainty embedded in their own models. More concerning is the reluctance to address the real costs being paid by working families and small businesses in pursuit of aggressive climate goals.

This study is a sobering reminder: energy policy doesn't operate in a vacuum. It has ripple effects across communities, job markets, and household budgets. If the public isn't fully informed about the tradeoffs involved, then our policy decisions are neither democratic nor sustainable.

As this debate continues, CSI is calling for an honest accounting—one that includes economic consequences alongside environmental aspirations. That's a conversation the energy industry, and all Coloradans, deserve to have.

VICTORY FOR COMMON SENSE: COALITION OF STATES HALTS CALIFORNIA'S ELECTRIC TRUCK MANDATE



In a significant development for U.S. energy independence, the national supply chain, and the American economy, California has agreed to repeal its sweeping electric truck mandates following a year-long legal battle led by Nebraska and joined by 16 other states. The decision marks the end of the California Air Resources Board's (CARB) "Advanced Clean Fleets" rule, which sought to ban the sale of new diesel trucks starting in 2036 and require all trucks and buses in the state to be zero-emissions by 2045.

A Win for the Supply Chain and Everyday Americans

This repeal is more than a victory for the trucking industry—it's a win for every American who relies on affordable goods delivered in a timely manner. California's mandates would have affected any truck fleet operating in the state, regardless of where it was based. Given that 30% of all U.S. vehicle imports come through California ports, the Advanced Clean Fleets rule had the potential to impose de facto national regulations, disrupting freight operations and raising consumer prices across the country.

By backing off the mandates, California has eased pressure on the logistics networks that underpin the U.S. economy. Consumers will benefit from lower costs at the grocery store, hardware store, and online retailers, while avoiding supply delays that have become all too familiar in recent years.

Protecting America's Energy Backbone

This outcome represents a significant protection against policies that would have artificially restricted demand for liquid fuels. The mandate would have forced truck fleets—our most diesel-dependent sector—to transition rapidly to electric vehicles, despite widespread concerns about EV cost, reliability, range, payload limitations, and charging infrastructure. Such a shift would have undermined American fuel producers and driven further reliance on imported minerals and foreign battery supply chains.

The now-repealed rule applied to *all* fleets operating in California, regardless of where they were headquartered. Given California's economic size and its status as a key gateway for imports and exports, these mandates would have rippled across the national supply chain—driving up shipping costs, disrupting logistics, and placing enormous

financial burdens on small and mid-sized operators.

Instead, this ruling reaffirms the vital role of domestic oil and gas in powering America's economy. Diesel remains the most efficient and effective energy source for long-haul trucking, agriculture, construction, and industrial logistics. Ensuring its continued use supports U.S. energy security and economic competitiveness.

Federalism in Action

Nebraska Attorney General Mike Hilgers, who led the charge against the rule, summed it up well: "This settlement is a huge win for everyone in Nebraska... for consumers who would have faced higher prices, and for the rule of law."

The lawsuit, *State of Nebraska v. Cliff*, challenged the legality of California's attempt to override federal transportation laws by imposing emissions standards that would affect other states. With backing from 17 states—including energy producers like Oklahoma, Texas, Louisiana, and Wyoming—this legal coalition demonstrated how federalism remains a powerful tool to check regulatory overreach and protect industry and citizens alike.

What Comes Next

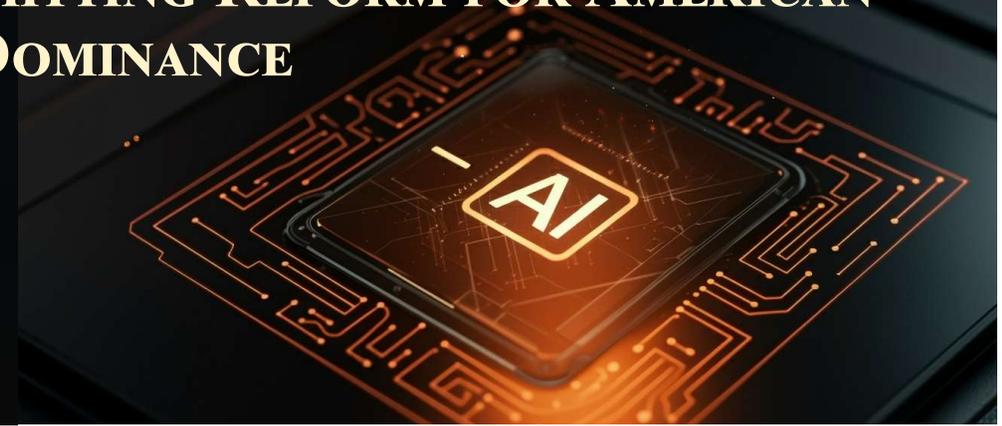
This victory may signal a broader shift in environmental and transportation policy. The U.S. House of Representatives recently voted to revoke the EPA waiver that had allowed California's 2035 gas-powered car sales ban to proceed. With the truck rule now repealed and the car mandate in danger, states and federal leaders appear increasingly unwilling to allow California's aggressive electrification agenda to dictate national policy.

Bottom Line for the Industry

This outcome underscores the importance of vigilance and engagement in policy battles. It is a reminder that federal and state-level mandates—even those originating from a single state—can ripple across the country and affect demand, infrastructure, and long-term planning for the energy sector.

California's retreat from its Advanced Clean Fleets regulation preserves market fairness, protects fuel-based logistics, and supports a practical, all-of-the-above energy strategy that includes traditional fuels. And most importantly, it puts the needs of truckers, producers, and consumers back in the driver's seat.

DEPA LENDS ITS VOICE TO CRITICAL LETTER SUPPORTING PERMITTING REFORM FOR AMERICAN AI AND ENERGY DOMINANCE



DEPA joined a coalition of organizations in signing a pivotal letter to Representative Julie Fedorchak, applauding the formation of the AI and Energy Working Group and underscoring the urgent need for permitting reform to meet the rising energy demands of artificial intelligence infrastructure.

The May 12 letter, submitted in response to the Working Group's Request for Information, highlights the essential role natural gas will play in powering the next generation of AI data centers. It stresses that America's energy dominance is increasingly hindered by outdated and overly burdensome permitting processes — particularly those governing pipeline development under NEPA and the Clean Water Act.

Participating in this letter aligns with DEPA's long-standing mission: advocating for policies that ensure the viability and growth of independent domestic energy producers.

The letter outlines key legislative reforms including judicial timelines, clear standing rules for permit challengers, and expedited remedies for project delays. It also endorses Senator Bill Cassidy's permitting reform bill and calls for integrating additional permitting changes through the budget reconciliation process.

These proposed reforms are not just about streamlining bureaucracy — they are essential to building the natural gas infrastructure that will make large-scale data processing and AI capabilities possible.

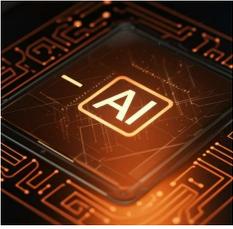
DEPA encourages members to read the full letter and to continue advocating for a regulatory environment that supports American energy strength.

Dear Representative Fedorchak:

The undersigned organizations are pleased to provide our views in response to your AI and Energy Working Group's recently circulated Request for Information. We represent companies and workers who build and provide equipment, materials, supplies and services to energy infrastructure development, including facilities essential to natural gas production, transportation and consumption. We comprise the vast industrial and labor supply chain that underpins American energy abundance, reliability and affordability.

We applaud and stand ready to support your critical work to develop legislative and policy recommendations to ensure that abundant power is available to support data centers critical to American AI dominance.

“This effort directly supports the energy infrastructure that underpins our nation's security and future technological competitiveness,” said Jerry Simmons, President and CEO of DEPA. “The permitting barriers facing natural gas pipelines don't just slow projects — they strangle the very innovation and development our country needs to maintain AI leadership. We are proud to join this letter and lend the voice of independent producers to the call for bold, legislative action.”



Long-term policy durability enshrined in law is critically essential to encourage large, long-term, multi-year investments by developers of energy infrastructure. Our comments below primarily address Pillar One of your Request for Information: American

Energy Dominance and AI Energy Demands.

Thank you for considering our views. We look forward to working with and supporting the AI and Energy Working Group as it develops policy and legislative recommendations to enable the investments needed for American AI and Energy dominance. We also stand ready to mobilize business and worker stakeholder voices in support of legislative reforms to ensure energy is abundantly available to enable American AI dominance.

Response to Request for Information by the AI and Energy Working Group Permitting Reform Essential to American AI Dominance

American energy dominance today is constrained by inadequate natural gas transmission capacity to enable greater levels and geographic diversity of production. Producers cannot produce more than the takeaway capacity of pipelines – which are now operating close to 100% of capacity.

The reason few new pipeline projects are being brought forward by midstream operators is the extreme time and cost uncertainty of new projects imposed by permitting barriers. No matter the potential economic opportunity, project sponsors are understandingly reluctant to undertake the high upfront costs of designing and engineering a new project or a capacity expansion to the point where permit applications can be submitted, when there is a high probability that the NEPA reviews and subsequent endless judicial challenges to the EIS/EA and other permit issuances will drag out project timelines and escalate construction costs beyond financial viability. This has occurred in numerous cases prominently including the cancelled Atlantic Coast Pipeline and PennEast Pipeline.

Clean Water Act Section 401 Permits

Another area of permitting uncertainty that must be cured urgently and durably by legislation is ambiguity in Clean Water Act (CWA) Section 401 provisions as administered by the Environmental Protection Agency. Section 401 allows a state to take delegation of EPA's responsibility for environmental review of a project's impacts to water bodies during construction, and to issue permits if it finds that those impacts will be sufficiently mitigated.

In considering Section 401 permit applications, some states (New York is a prime example) have gamed this ambiguity by interpreting CWA language to deny construction permits

based not on water quality considerations as intended by the Act, but rather on claimed cumulative environmental impacts of greenhouse gas emissions resulting from combustion of the pipeline's natural gas throughput, a factor not addressed by the CWA. Under the first Trump Administration EPA completed a rulemaking providing implementation guidelines that clarified that a factor other than water quality cannot be a criterion for issuing Section 401 permits. That reform was reversed by the subsequent Biden EPA. For permitting certainty, that clarification must be enshrined by legislating permanent changes to the CWA itself.

Natural Gas: The Primary Energy Source for AI Data Centers

Over the critical next several years in the race for American AI dominance, natural gas power generation is projected to provide a high percentage of the enormous growth in electricity consumption driven by power needs of new AI data centers. Therefore, to ensure availability of natural gas, whether for increasing grid capacity or for "behind the meter" generation, we must have NEPA, CWA and judicial reforms that tighten the review process and limit both judicial and administrative challenges for new natural gas transmission projects.

Judicial Reform

Most fossil energy, including natural gas for AI data center power generation, can be neither produced nor consumed if it cannot be transported by pipeline from point of production to point of consumption. Thus, reforms to the currently unworkable process for pipeline permitting are absolutely essential to powering AI dominance. One approach to judicial reform that we applaud is the formula embodied in the bill recently introduced by Senator Bill Cassidy (R-LA), which includes the following provisions:

- *The legislation broadly defines "project" as any activity requiring a permit from any Federal agency with jurisdiction over any aspect of the project.*
- *An initial claim seeking judicial review of an issued permit must be filed within 120 days of the date of permit issuance.*
- *Subsequent action, such as seeking an injunction based on the initial claim, must be filed within 120 days of the initial claim.*
- *If the claimant fails to submit additional (subsequent) action by that deadline, □ the initial claim is invalidated;*
- *the claimant is barred from bringing additional claims;*
- *the claimant cedes any right of action with respect to the initial claim.*
- *If a court determines that the Federal agency issuing the*



permit did not comply with the process required by applicable law, the default remedy is to remand the application to that agency for further action to cure the lack of compliance.

- No court shall vacate any project permit unless the project presents "imminent and substantial danger to human health or the environment for which no other remedy is available."
- The only individuals who have standing to challenge a permit in court are those who will personally suffer a "direct and tangible harm", defined as physical illness or bodily injury, or an uncompensated economic loss.
- If a permit is enjoined, remanded or vacated by a court, the project sponsor and the permitting agency must engage in a mediation overseen by the Federal Permitting Improvement Steering Council (FPISC), which is comprised of senior representatives from 13 federal agencies involved in infrastructure permitting (all of which are part of the Administration), with the requirement to:
 - address the reason(s) for remand or vacature, and
- reauthorize the project.
- The remedy that results from the above FPISC process shall not be subject to judicial review or right of action by a project opponent.

Permits must be reissued within 15 days of completion of the above FPISC process, if not the project sponsor may proceed with project development.

- Any judicial challenge to a permit must be filed in the court of jurisdiction where the project is physically located. If the project spans multiple court jurisdictions, the court of jurisdiction will be the one covering the geography where the greatest financial investment exists.
- To avoid bias, cases must be assigned to the court's judges at random.
- FPISC will maintain a publicly accessible database of claims that have not been adjudicated by the court within 90 days of assignment to a judge, in order to expose and remedy instances where a claim has not been reviewed in a timely manner.
- The provisions of this Act will apply retroactively to any permit applications made prior to enactment of the law.

Reform Embedded in the Budget Reconciliation Process

We also favor a second broad, blanket approach that applies to both NEPA reviews and judicial reform to project permit-

ting. It is embodied in the recently released House Committee on Natural Resources print of that Committee's component of the Budget Reconciliation Bill. This language adds a new Section 112 to NEPA, entitled "PROJECT SPONSOR OPT-IN FEES FOR ENVIRONMENTAL REVIEWS", that provides for the cognizant lead Federal administrative agency to charge the project sponsor a fee to cover the cost of an environmental review, the proceeds from which will be deposited into the Treasury as miscellaneous receipts.

The draft new Section provides that any environmental review for which a fee was paid is subject to this new NEPA language: "There shall be no administrative or judicial review of an environmental assessment or environmental impact statement for which a fee is paid under this section." This provision would also apply to Findings of No Significant Impact or Records of Decision regarding an EIS or EA.

It should be noted that the above provisions would apply not only to pipelines but also to other major projects subject to NEPA and/or the Clean Water Act. Significantly these include oil and gas production complexes, power transmission, roads and bridges, export facilities, petrochemical refineries, mines, and other infrastructure essential to American energy dominance, security, reliability and affordability.

Together these new policies enacted into law will unleash the very large private investments in the infrastructure essential to significant additions to generating and grid capacity needed to power American AI dominance.

SIGNED BY:



Toby Mack, President & CEO



Linda Bauer Darr, President & CEO



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Jeff Eshelman, President & CEO



M. Robert Weidner, II, President & CEO



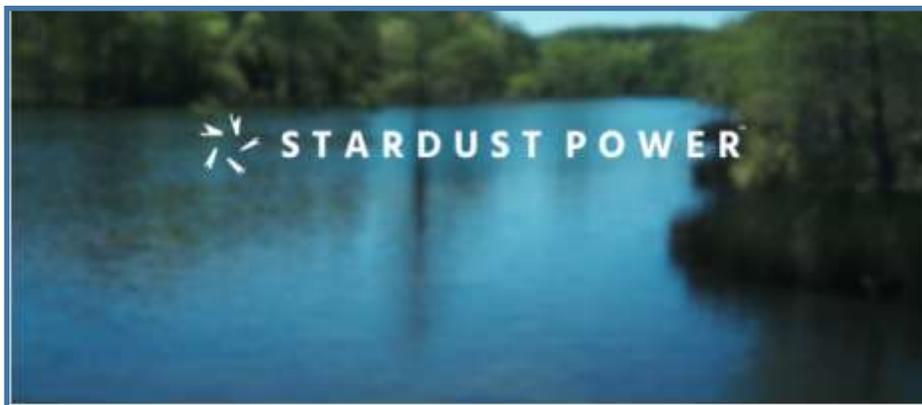
Michele Stanley, Interim CEO



Elizabeth Worrell, Managing Director



David M. Fink, President



No Wastewater Discharge Permit? For Stardust Power in Muskogee, That's Good News

BY NATHAN HAMMER

Stardust Power, a company developing battery-grade lithium products, recently announced a significant step for its planned facility here in the great state of Oklahoma. They've confirmed with the Oklahoma Department of Environmental Quality (ODEQ) that they will not need a traditional industrial wastewater discharge permit.

Now, you might hear "no permit" and think that sounds like a facility getting a pass on environmental rules. But in this case, it's actually because of the way Stardust Power plans to handle water at their site. They're using what's called a "closed-loop" water system.

Think of a closed-loop system like recycling water within the facility. Instead of using water once and then treating it to a certain level before sending it out to a river or public system (which is what a traditional wastewater permit covers), a closed-loop system constantly treats and reuses the water internally. This means there's no wastewater being discharged off the property into public waters.

The ODEQ's determination that a discharge permit isn't needed simply reflects this design. If a facility isn't discharging wastewater, there's no need for a permit that regulates wastewater discharge.

This approach has several upsides. For one, it significantly reduces the facility's demand on local water supplies after the initial filling of their tanks. It also minimizes the potential for any impact on nearby waterways because there's no treated water being released into them. Stardust Power's CEO, Roshan Pujari, highlighted this, stating that not needing a water permit shows how cleanly the facility has been designed, reducing water needs and discharge volumes.

This water management plan is just one piece of the puzzle for Stardust Power's project in Muskogee. As we've covered before on the Substack, this facility represents a notable industrial development for the area. You can get a broader overview of **Stardust Power's Muskogee Refinery project** and its importance by reading my article [here](#).

Getting a large industrial site up and running involves many details, and securing necessary infrastructure is key. Another important step we discussed recently was the finalization of the power supply agreement. You can find details on **how Stardust Power and OG&E finalized that crucial agreement** in my article [here](#).

Stardust Power is still working through other necessary environmental permits, like the Minor Source Air Permit, which is under review by the ODEQ. They have already secured a permit for managing stormwater from construction activities, demonstrating their commitment to managing water responsibly on site during the construction phase.

The takeaway here is that not all permits are about controlling pollution being released. In the case of a closed-loop system, the absence of a wastewater discharge permit means the facility is designed to prevent that discharge from happening in the first place. It's a different way of managing water, focused on conservation and internal recycling, which aligns with true environmentally responsible practices.



Nathan is an experienced entrepreneur and problem-solver focused on optimizing complex and heavily-regulated industries through innovative process improvements and technology-driven solutions. He seamlessly blends his 16 years of hands-on experience in field services, construction, operations, maintenance, technology, and environmental & safety compliance (USEPA, CISA, PHMSA, DOT, OSHA) across diverse sectors in 29 states.

Stay up to date with the American energy and manufacturing sectors by following his LinkedIn newsletter **SYNERGIZING AMERICA**.

You can also follow him at **[NATHANHAMMER](#)**.
[SUBSTACK.COM](#).

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Jacqueline Anderson Horsley • 1st
Legislative Assistant & Energy Policy Liaison at U.S. House of Represent...
4d • Edited •

!! **JUST INTRODUCED:** Rep. Latta's REFINER Act was introduced in the House and was included in today's Energy Subcommittee legislative hearing that featured a total of 14 bills aimed at addressing systemic issues that are holding back our country's economic and technological energy potential.

⚡ **FROM ENERGY CHAIRMAN LATTA:** The nation and world are safer when the United States is energy dominant.

➡ **THE REFINER ACT:** This simple legislation will help increase domestic energy dominance by identifying factors leading to low refining capacity and presenting lawmakers with recommendations to expand refining capacity.

 **Latta Introduces REFINER Act to Increase U.S. Refinery Capacity**
latta.house.gov

7



Jacqueline Anderson Horsley • 1st
Legislative Assistant & Energy Policy Liaison at U.S. House of Represent...
23h • Edited •

!! **The House Committee on Energy and Commerce** passes the budget reconciliation bill after 26 hours and 22 minutes of markup. You may never know what to expect for a day in the life on Capitol Hill, but this was a great example of the dedication E&C committee members and staff have to the American people and to public service. us





Lee Clark • 2nd
Global Resourcing Manager at Elem...
1w • 🌐

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"California's first of three offshore platforms back in oil production business after 10 years."

'[Sable Offshore Corp.](#), a Texas-based oil company, has restarted oil output from a platform off the coast of California, where production has been offline for a decade. Two more platforms are left to be brought back online.'

Link to article:

<https://lnkd.in/edmFU3AB> ✓



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Regarding the repeal of California's EV mandate: "At the end of the day people realized they don't want to be forced into certain types of vehicles. People will vote with their pocketbooks, and the price of E.V.s for a lot of people are out of reach." [Thomas Pyle](#), President of the [American Energy Alliance](#)

<https://lnkd.in/g9XIUdrh>

#EVS #California #Congress #oil #oilandgas #climate #electricvehicle #electriccar



Why 35 House Democrats Joined Republicans Against a Major Climate Policy
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Chet Thompson • 1st
President and CEO at American Fuel & Petrochemical Manufacturers (AFPM)
4d • 🌐

The House of Representatives' vote to overturn California's ban of new gas cars a HUGE win for consumers all across the country. Time for the Senate to do the same, and quickly!



AFPM & API: Congress halfway to overturning CA gas car ban
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Big names. Big ideas. 📢 The Petroleum Alliance Annual Meeting is headlined by a few industry legends!

Rick Muncrief, who led [Devon Energy](#) until his retirement in March, brings a real-world perspective on the challenges and opportunities facing modern oil and gas producers. Stephen Moore, a co-founder of the Committee to Unleash Prosperity and former senior economic advisor to President Donald Trump, is known for his unapologetic support of free-market principles, domestic energy production, and limited government.

Join us June 3-6 at [The Ritz-Carlton Dallas, Las Colinas](#) — you won't want to miss insights from these two powerhouses in energy and economic policy. Register here: <https://bit.ly/3Y2x6D7>



Stephanie Canales • 1st
Tenaris | Board Member DEPA | Ambassador D...
4h • Edited • 🌐

We've been busy!

Grateful to have been part of the 2025 DEPA ...more



THE PETROLEUM ALLIANCE OF OKLAHOMA

ANNUAL MEETING SPEAKERS

RICK MUNCRIEF
RECENTLY RETIRED
DEVON ENERGY
PRESIDENT AND CEO



STEPHEN MOORE
CO-FOUNDER OF THE
COMMITTEE TO
UNLEASH PROSPERITY

WE ARE THE PEOPLE OF AMERICAN OIL AND NATURAL GAS



DOMESTIC ENERGY PRODUCERS ALLIANCE

The welfare of the U.S. and the world begins with energy. With the change in administration, we now have leadership that understands the importance of domestic oil and gas production in achieving energy dominance and strengthening our economy. However, our work is far from over.

A pro-fossil fuel administration provides us with a unique opportunity to make meaningful strides, but it does not mean we can afford to sit back and relax. We must continue to engage, educate, and advocate to ensure that the foundation of our energy security remains strong for generations to come. Policies and regulations can shift quickly, and it is vital that we stay vigilant and proactive in defending our industry against misinformation and unnecessary regulatory hurdles.

DEPA remains committed to bringing facts and clear thinking to the table where energy challenges are being discussed. Our presence in Washington, D.C., is critical to ensuring that lawmakers understand the real-world impact of their decisions and the essential role our industry plays in the lives of all Americans.

The most powerful way you can make a difference is by becoming a DEPA member or renewing your membership. Your support strengthens our ability to advocate for policies that protect and promote American oil and gas. But membership is just the beginning—you can amplify DEPA's impact by staying engaged, spreading the word to your network, and ensuring that industry voices are heard where it matters most.

Thank you for your dedication to DEPA and for everything you do to support our mission. Together, we can secure a strong, thriving, and energy-dominant future for our nation.

Sincerely,

Jerry Simmons

DEPA President/CEO

WE ARE THE PEOPLE OF AMERICAN OIL AND NATURAL GAS



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“Let’s all check our desires to be fashionable or hip when we talk about energy. Energy is so critical to human well-being that we must speak honestly, candidly, and frequently to combat the increasingly damaging plague of energy ignorance that has taken over our country and much of the western world.”

- Chris Wright, Liberty Energy CEO and DEPA Board Member

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DEPA PAC Co-CHAIRMEN | DAVID LE NORMAN AND DAN BOREN

The DEPA PAC works to ensure there is a loud, clear voice for the industry. Reliable, clean, efficient, affordable, energy is vital to our country, and the world. We are unapologetic about being the driver of economic growth and security across the globe.

We believe the only way to accomplish our sharply focused agenda is to establish common ground. We consistently seek common sense solutions to the challenges that face us in business, including our relations with the legislative and executive branches of the Federal government.

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