

Cliffside Refiners Limited Partnership Meeting

June 9, 2020 @ 9:00 AM

Attendees:

(Cliffside) Rodney C. Brad H. Mark M.
(Downtown) Emress B. Sam B.
(NOC) David S.
(CRLP) Nick D. Bob L. Bobby S. Kaylyn S.
Mike D. Tony K. Brad B.

Roll Call

➤ Noted

Sam B.-Well let us go ahead and get started hopefully Nick will join us soon. Have there been any changes for the COVID?

Tony K.-Nothing on my end.

Nick D.-Sorry phone problems.

Any updates on COVID? I did hear that for NC, numbers have been picking up that beaches are open and tourists are allowed there.

Sam B.-There are a couple of changes. Our guards have a check list so they have been updated to allow out of state contractors. We have some things for return to office. The first phase was up to 25% in the office.

Nick D.-Ok. Plant status update.

Mark M.-Things are going well with the plant. We decided to test the north methane pump so if that does well we will keep that running. It is about 7 degrees above zero now. Last time we tried this we overlooked the dew point step. We checked the boil levels on the Atlas Copco. Two of them did not need additional oil. The pipeline pressure is higher than what I have been reporting in the past. We are 1368 we are targeting between

We are putting about half of our production into the pipeline

Nick D.-Do the operators or mechanics keep an active log by machine?

Mark M.-We write it on a calendar. We will be working on getting the types of maintenance on

Nick D.-What you are talking about moving on with the PSM standard would be better information. I think I read in an email about a compressor needing oil.

Any questions for Mark?

Mark M.-You bring up a good point

We have always had to add oil to the north methane pump but it has not been too excessive.

The south methane pump as we rebuilt it has been running without needing to add anything to it.

Nick D.-I added a note back in 9 or 10 weeks since I returned and we had these discussions about plant operations. We had discussions about our auction. The past few days I have been reading about several things coming out of the helium industry. The other day I was reading about the supply/demand situation. The gist of it was indicating that we will not see a rapid return to consumption. It will be like a long check mark to

That got me thinking about some of the dialogue we have had over the last few months. Sam I will defer to your information as to what you or seeing or hearing about demand. One thing that has changed is the CRLP ability to support BLM on site. I say that without having talked to the companies about willingness to go to site.

Clearly the partner companies are prepared to support on site work to some degree so that changes the dynamic to help the operating team to help if there is an outage or a planned outage. I will open that up for dialogue.

Sam B.-There is a lot of discussion about campaign and it means different things to different companies. We lose a lot of gas bringing the plant up and down. The govt position is more about cycling instead of bringing the plant up and down. During the higher temperatures it is more difficult

It is problematic to run the plant in campaign mode. Mark do you have some additional things to add?

Mark M.-If we took the plant down due to low market demand. I need some information on how long we can keep the wells locked in with out watering off. Bringing the plant back up I think that should be market based. I don't think every week is possible. There is a hidden benefit to reinjecting and that is to return the helium to the center of the dome. So maybe that is

Nick D.-Those are all great comments I am not pushing for shutting the plant down. I just wanted to throw it back on the table.

Brad B.-We are certainly not, we haven't turned the switch on traveling by plane by any means. It doesn't change the fact of supporting as many of us can drive in.

Tony K.-It is 12 hours from Houston, we aren't flying yet.

Nick D.-I just wanted to put that out there to see if there was any major interest. What I am hearing is let's just keep continuing doing what we are doing. I don't have access to your

general supply/demand information so I can't really look forward to July and August. Unless there is other discussion I would table it.

Sam B.-We get these updates, normally we get them on a monthly basis. You think you have it worked out and then something happens. There could be a situation where we turn the plant off and then we have to bring it right back up.

Nick D.-Any other questions before we move on to the outage planning?

NONE.

Nick D.-We have said in the past couple of weeks we don't have a hard date for taking one or more outages. Brad I understand you are going to the site, Tony you have talked about your team going to the site. I just need to know when you have the information that you need so we can start putting some dates down so Sam can do the communication that he needs to do. The thing I think about is the air coolers and whether we need to go after the cleaning on a more urgent need. I know we haven't set a date but we need to get information for availability for sometime in July because we will need to do this work. Open for comments.

NONE.

Nick D.-Plant visits nothing has changed there. Eric H. with support from Brad will be doing PSM work next week and from that we will evolve some further actions that may or may not involve CRLP. Brad H., my paperwork went in as one of the earlier ones and so far I have not received any information back. Just for your information I should get a call or email earlier than some of the other submissions. I don't have anything else. Anyone else have anything we need to talk about?

Sam B.-Rodney did you want to share about getting back to do the sampling again?

Rodney C.-We started our regular schedule and I think that all of the plants have been done down the line.

Nick D.-Sam are you having another storage call?

Sam B.-Yes there will be another storage call and we will be announcing that we will be going to a teleconference meeting for the Storage meeting in July.

Emmett L.-I wanted to introduce myself, so I have taken over for Melissa Hutchison for

Nick D.-I did get the information for modification.

It is probably going to be time to update the contact list. I will follow up with you later this week. Anything else?

Alright, my apologies for the delay this morning. Talk to you all next week.