



NC SUSTAINABLE
ENERGY ASSOCIATION

2019 | ANNUAL REPORT



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As you've likely heard, in January 2020 I dove into a new role as NCSEA's Chief, Strategy & Innovation. I am proud to say that throughout my nearly 15 years as NCSEA's Policy and then Executive Director, our organization has been a cornerstone leader or supporter in nearly every clean energy achievement across our state. Most of all, I am deeply grateful for our high impact team of dedicated, seasoned professionals to collaborate with for far greater impact in 2020 and the next decade.

When I accepted the role of Executive Director in late 2005, NCSEA's leaders and I shared a vision that North Carolina and the southeast were sitting on a gold mine of untapped economic opportunity for which sustainable energy policy was the best path forward. I had no idea what else I was signing up for. In the following years, as my gracious and supportive wife can attest, this work would require the focused investment of an entire decade of my life to simultaneously learn how to build a strong, sustaining, trusted public interest institution 365 days a year AND effect the incremental policy and market changes only a trusted, responsible institution can. Needless to say, I had a love-hate relationship with the role of Executive Director.



Anyone who has been a board, staff team, supporter, partner, or member with NCSEA over the last 15 years knows the opportunities and challenges we have tackled together to cultivate the opportunities of today. Since 2005, the NCSEA community has had a monumentally beneficial impact on the economy, quality of life, and energy future of North Carolina including:

- Enabled over \$28.2 billion in total economic impact on \$14.8 billion of renewable and energy efficiency investments in our state, improved the energy productivity of our state economy, and grew clean energy jobs 550 percent;
- Renewable electricity generation rose from less than 1 percent to over 12 percent on a path to 30 percent by 2030 while electric sector greenhouse gas emissions fell 34 percent on a path to 50 percent reduction by 2025;
- Over 100 clean energy provisions passed into law and regulatory decisions ordered, including 16 energy efficiency bills, and tax incentive policies had a cumulative net positive fiscal impact;
- Strengthened the building energy conservation code 15 percent and increased performance contracting caps by 10x, enabling over \$1 billion in taxpayer savings;
- Innovated leading edge utility solutions for delivering affordable energy efficiency that can work for a majority of America's low-income households today;
- Launched Women in Clean Energy and NCSEA's Equity, Diversity, & Inclusiveness Initiative, providing a platform for building an inclusive energy economy and improving economic mobility; and
- Our Renewable Energy and Energy Efficiency Portfolio Standard, or REPS achieved compliance four years early at about half the expected cost, avoiding over half a billion in costs to electricity ratepayers.



Since 2005, through the steadfast partnership of the Z. Smith Reynolds Foundation, the Energy Foundation, the Stanback family, Coastal Credit Union, Richard & Lonna Harkrader, and our many members and supporters, NCSEA has continuously evolved, including:

- Making the leap from a volunteer led board to a capable and respected team of 17 and five contractors boasting 251 years of relevant career experience;
- Breaking out of a sub-\$100,000 annual budget to over \$2.5 million; and
- Supporting the founding and initial growth of multiple non-profits spanning diverse societal needs, perspectives, and sectors to create a more inclusive leadership community.

NCSEA is not an environmental organization, we are not a trade association. Folks have never really known what to call NCSEA, and that is okay, because there is no standard category or name for a non-profit constantly working at the leading edge of change for the public interest of our state. We are a clean energy non-profit working with and for all North Carolinians who produce, use, and are impacted by electricity. We work most with those who want to collaboratively realize a sustainable energy future for our state, and we respectfully engage the best we can within our limitations. The more capable, collaborative, and accountable NCSEA is, the better our energy system and energy economy becomes each year for all North Carolinians.

I foresaw, and our team and board agree, that the change that NCSEA needed to make to be our best was for me to move into this new role. I already find myself popping out of bed each morning excited to collaborate with all of you to realize a shared energy vision. Thank you for your support, friendship, and leadership over these many years, and I look forward to writing this next chapter together.

Ivan Urlaub
Chief, Strategy and Innovation



Transition is, by nature, a leap into the new. Vision is what you need to galvanize you to leave your comfort zone and make the leap into sometimes murky waters. About 15 years ago, NCSEA's board made a big leap into murky waters by hiring and appointing into leadership a young visionary, Ivan Urlaub. I don't think even the most optimistic of those board members could have projected the results NCSEA has seen since that time. Within a few years of joining NCSEA, Ivan and a small group of individuals (including Michael Shore, whose letter you will read later in this report) somehow managed to complete what had seemed unthinkable—the passage of a renewable energy and energy efficiency requirement in the south.

Passage and implementation of that, and dozens of other responsible policies, along with innovative business models and declining costs, have resulted in our state being second only to California in solar energy capacity installed and operating. Billions of dollars have been invested and tens of thousands of jobs have been created in clean energy and energy efficiency since the Renewable Energy and Energy Efficiency Portfolio Standard, or REPS in 2007. You can see the impact of Ivan's leadership in our 2019 Economic Impact Study, where we reported that the total economic impact in North Carolina from clean energy (renewable energy and energy efficiency) project development from 2007 - 2018 was \$28.2 billion.



In addition to having an immediate and monumental impact on North Carolina's energy economy, Ivan also built NCSEA from a small team of two to the leader in clean energy public policy and market development that it is today. That team of two is now over 20 staff and contractors. Under Ivan's leadership, NCSEA became inextricable with the effort to drive public policy and market development for affordable and accessible clean energy in North Carolina. Those reading this letter and participating in NCSEA's membership, events, and communications know this well.

Now, Ivan's vision for the energy system in our state continues in new forms. Because of that vision, and the monumental opportunities ahead of us to further strengthen our clean energy economy, Ivan requested a change in title to Chief, Strategy and Innovation. This transition is perfect timing for advancing clean energy policy, regulation, and implementation. NCSEA is at a crossroads. We can continue along the path we are currently on, or we can leap into the new and seize the opportunity to push for the next phase of clean energy. If we are to truly live our mission of driving a clean energy system and economy that benefits all of North Carolina, this is not just an opportunity. It is an obligation. Ivan will continue to lead that charge in his new role. In fact, I am excited to see just how much farther we can go now that he can exercise his greatest strengths: strategy and vision.

I, for one, am excited to watch the future of North Carolina's clean energy industry unfold in this new chapter. Each of us, the NCSEA team; our members; partners; and donors, will have a chance to say that we were there doing our part when the shift to an affordable, reliable, accessible clean energy economy happened for North Carolina.

Ward Lenz
Acting Executive Director

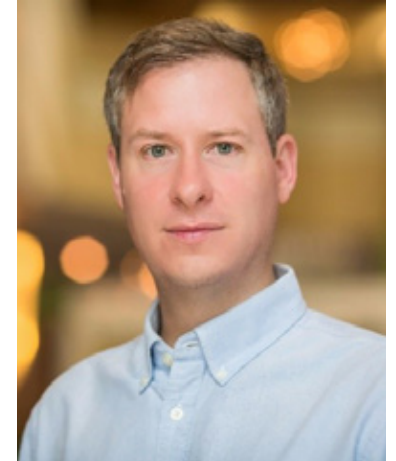


As members of NCSEA's Board of Directors, we were among the first people Ivan and Ward spoke with regarding the change in organizational structure you've read about in the previous pages.

It was immediately apparent to us that this was a carefully considered plan that presented enormous possibilities for NCSEA's further success and advancement. However, the NCSEA Board of Directors, responsible for overseeing the work of the Executive Director, must be equally enthusiastic.

In keeping with these duties, we pressed Ivan and Ward to perform their due diligence by researching other organizations that have made a change of this magnitude, and develop a proposal to present to the rest of the Board. They put countless hours into their proposal, giving full attention to every potential impact they could identify. Their primary focus was not on themselves, but on NCSEA's team, supporters, and partners and how this change would impact them.

As part of this inquiry we held further conversations with Ivan and Ward and it was quickly apparent that Ivan's passion, expertise, and visionary perspective were being under-utilized in the role of Executive Director. After reviewing the proposal, each board member posed important questions to both Ivan and Ward that allowed each of us to engage deeply on the related merits and challenges.



In these conversations the full NCSEA Board truly began to understand that this was not simply a title change, but the culmination of years of work and self-reflection. NCSEA's huge success under Ivan's leadership is a testament to his dedication to clean energy and the passionate, highly capable team he oversees. As Executive Director, however, Ivan has been unable to fully utilize his strategic and visionary skills. As a Board, our exercise was to imagine the possibilities for NCSEA if he was able to utilize 100 percent of those skills.

In both larger and smaller group discussions, each board member heard Ivan describe the goals he has for NCSEA, with strategies to reach those goals already in development. We were convinced that we would be doing NCSEA and North Carolina's clean energy future a disservice if we didn't approve the requested change and give NCSEA, and Ivan, the best chance of reaching their full potential as possible.

Our comfort with this change is significantly impacted by the presence of Ward, whose insight and expertise, history with NCSEA, and steady hand puts us at ease that this will be a smooth transition. We are excited to see what the future for NCSEA holds now that the talent and vision of their leaders are in their best position to succeed.



James Ortega
2019 NCSEA Board of Directors Chair



Cris Masselle
2020 NCSEA Board of Directors Chair



It is safe to say that I know Ivan Urlaub pretty well. In fact, our paths over the previous two decades have crossed as often as the electrons passing through the p-n interface of a solar photovoltaic cell.

In a metaphor that is overly generous to me, Ivan has been the Luke Skywalker of clean energy in North Carolina to my inner Yoda. I am proud to say that Ivan was my intern at Environmental Defense Fund in the early 2000s. Next, I was a recent NCSEA Board member when Ivan was first hired by the organization. Then, we served together on the NC Climate Change Commission in the mid-2000s. In our most impactful collaboration, he and I sat side-by-side in legislative negotiations across the table from the electric utility companies every Friday for six months to hammer out North Carolina's landmark Renewable Energy and Energy Efficiency Portfolio Standard, or REPS in 2007.

Ivan and NCSEA were there for me when I launched and grew a solar company in the late 2000s. As fate would have it, I rejoined the NCSEA Board of Directors in 2017. In 2018, I served as chair, so just like in the beginning of our relationship, Ivan once again reported to me.

My relationship with our clean energy Jedi, however, is much deeper than what we have done together. I hold Ivan in high esteem. I have seen him atop the peaks of success and in the nadirs of struggle against the Empire. I have witnessed his thoughtfulness and integrity in making important decisions. I admire his vision, eloquence, honesty, vulnerability, and intentions. I recall so well when the REPS bill was losing popularity because of political horse trading, Ivan stuck to good policy as his guide on what NCSEA could and should support.

Ivan's passion is policy. He wants to destroy the Death Star of our current perversely incentivized energy regime to conceive a system at the state level that is fairer, cleaner, and more cost-effective. I don't think Ivan ever longed to be leader of NCSEA, but he accepted the role year after year because there was no one who could better serve as Executive Director. The irony of his reluctant leadership is that his tenure was replete with accomplishment, more than the most ambitious leader could hope for.

And we have one more reason to appreciate Ivan. Ivan has assembled a management team at NCSEA that is stronger than any one person. Ward, Laura, Peter, Karen, and Jordan, along with Ivan are the perfect team to transition NCSEA to the next evolution of its development. While NCSEA evolves its leadership, I await with great anticipation what Ivan creates next in his focus on policy formulation.

There are so many of us who have benefited from Ivan's 15-year leadership of NCSEA. On behalf of every person who has installed solar on their house, every person who has a job in the clean energy sector in North Carolina, every person who breathes cleaner air in our state, we thank you, Ivan Urlaub, and wish you the best in the next phase of your career with NCSEA.

May the (electro-magnetic) force be with you.



Michael Shore
Sustainable Entrepreneur and Yoda Wannabe



2019 HIGHLIGHTS

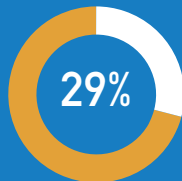
12,720 installed renewable energy systems in North Carolina.

Launched a podcast with over 9,000 plays with listeners from over 50 countries.



12.9 percent of all electricity generated in North Carolina came from clean sources.

Over the course of 2019, NCSEA sent **over 70 newsletters** with an average open rate of 29 percent.



NCSEA made **46 filings** at the North Carolina Utilities Commission with a total of **2,971 PAGES**.

NCSEA held **25 member calls** to discuss some of the most important issues impacting clean energy in North Carolina.



NCSEA hosted **EIGHT events** throughout the year.

Over **20,000 e-mails** sent to legislators during the legislative session.



251 years of career experience on NCSEA's team.



Advance

COLLABORATION | INNOVATION | EQUITY, DIVERSITY, AND INCLUSIVENESS

Through our work, we saw 12.9 percent of all electricity generated in North Carolina in 2019 come from clean sources—an **8.5 percent increase** from 2018! Additionally:

- Clean energy brought North Carolina **\$14 billion in revenue in 2018**;
- Rooftop solar registrations increased by 44.2 MW, a 25 percent increase from 2018;
- NCSEA reached agreement with Duke Energy, the Public Staff, and environmental groups regarding **performance incentives mechanisms for Duke's energy efficiency programs**;
- Through October 2019, utility-scale solar increased by close to **170 MW**, a 4 percent increase from the end of 2018;
- North Carolina was #4 for electric vehicle charging stations per capita; and
- North Carolina remained #2 in the nation in installed solar capacity.





ADVANCE: Collaboration

Unprecedented coalition in size and diversity aligned in efforts opposing Senate Bill 559 at the North Carolina General Assembly.

- With the help of our members, partners, and friends we sent over 20,000 *emails to legislators* during the legislative session.

Lobbying for new Commissioners with our partners at the General Assembly:

- Since 2017, the Commissioners at the North Carolina Utilities Commission have changed almost entirely, and the new commission has the potential to change regulatory outcomes for the better.

Executive Order 80 (EO80) and Clean Energy Plan:

- While EO80 was announced in 2018, we spent 2019 engaged in stakeholder processes to get to work on achieving the goals laid out in EO80.



ADVANCE: Innovation

In 2019, we released a report demonstrating that Duke Energy's status quo is no longer the cheapest energy option for North Carolinians—and it is *certainly not the cleanest*. This study and associated alternative partial Integrated Resource Plan (IRP) proposal was a huge boon to NCSEA's work at the North Carolina Utilities Commission during Duke Energy's IRP process.

Ultimately, the North Carolina Utilities Commission accepted only the 2019-2020 plan—requiring Duke Energy to re-evaluate and present a different (hopefully cleaner and cheaper) option for 2021 and beyond.



ADVANCE: **Equity, Diversity, and Inclusiveness**

With our board of directors, NCSEA re-evaluated our existing Diversity and Inclusiveness plan to more adequately reflect our beliefs and the issues facing underserved communities in North Carolina. Together, we developed a set of principles that we will use to guide our analysis, strategy, program development and implementation, and all other areas of our work.

EQUITY, DIVERSITY, AND INCLUSIVENESS GUIDING PRINCIPLES

It is our responsibility to listen to every person and player in the energy supply chain in North Carolina, including energy consumers from all backgrounds. We *must* question how people interact with the energy system dynamics currently at play in North Carolina, challenge the status quo where needed, and perpetually move our state toward a more equitable (and just) direction regarding our energy future.

In doing so, we will work towards the vision where everyone has equitable access to affordable clean energy and the opportunity to influence corporate and government energy decisions.

We embrace diversity in all aspects of our work, in order to achieve our mission of affordable, accessible, and reliable clean energy for all North Carolinians.



ADVANCE: **Equity, Diversity, and Inclusiveness**

In 2019 NCSEA allowed ourselves to step out of our comfort zone. Recognizing that the clean energy industry cannot be sustainable until it is wholly inclusive, we took steps to bring equitable solutions forward in a genuine way.

- Beginning in 2019, NCSEA will no longer sponsor or co-host events that do not include a diversity of panelists and speakers. For the purposes of this policy, we define diverse panels and speaker lists as those that are made up of individuals of varying genders, races, and ethnicities.
- NCSEA does not intend for this policy to be a “quota”—we will not require a certain number of diverse persons in order to sponsor or co-host an event. Rather, we aim to encourage dialogue about race and gender among clean energy advocates, institutions, and industry to support diversity efforts with similarly minded organizers.



Inform

CAPTURING DATA | UNLOCKING BARRIERS | SPREADING AWARENESS

In 2019, NCSEA continued to position ourselves as the leading source for reliable, evidence-based, and timely information necessary to understand the latest clean energy trends and developments. We used data, innovative thinking, and collaboration to identify the pressing issues facing North Carolina's clean energy economy. Through newsletters, publications, and bi-weekly members-only phone calls, we provided a forum for information sharing and strategic discussion.



INFORM: Capturing Data

In 2019, we further developed our Renewable Energy Database (REDB). The REDB is a comprehensive source of information on renewable energy projects in North Carolina. All the information contained in the REDB comes from filings to the North Carolina Utilities Commission, primarily from Reports of Proposed Construction (ROPCs) and Certificates of Public Convenience and Necessity (CPCNs). **NCSEA is the only organization in the Southeast to maintain a database of this type.**

- NCSEA analyzes this information to illustrate the role that clean energy is playing in the lives of North Carolinians, gain insight into market barriers, and identify possible solutions.
- Using the REDB, NCSEA is able to track the overall growth of clean energy in North Carolina from year to year.

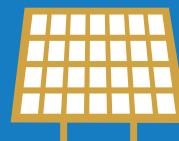
In 2019, we were excited to report that the number of residential solar PV systems registered increased by over 25 percent from 2018 to 2019.

Systems Registered (Year to Date 2019)

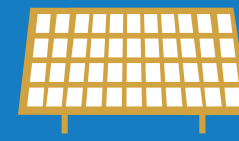
Residential
4,959



Commercial and Industrial
108

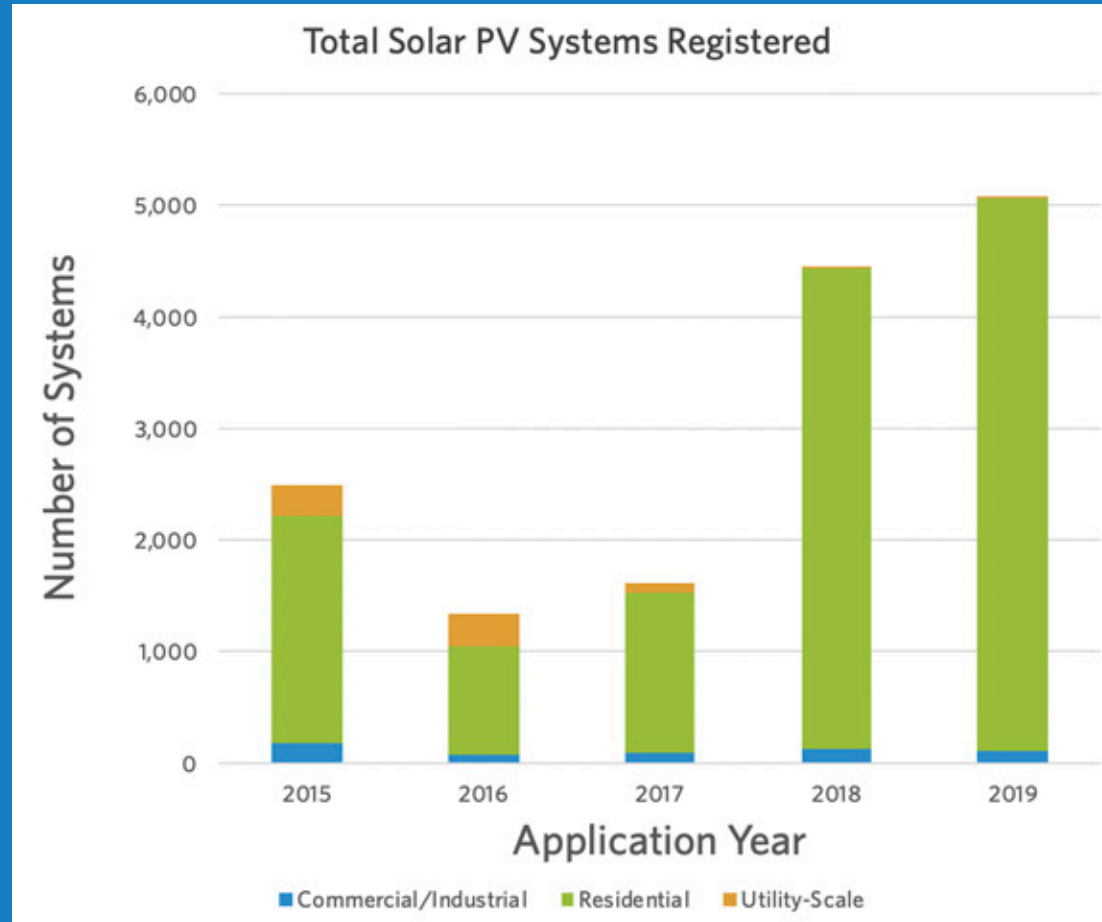


Utility-Scale
17





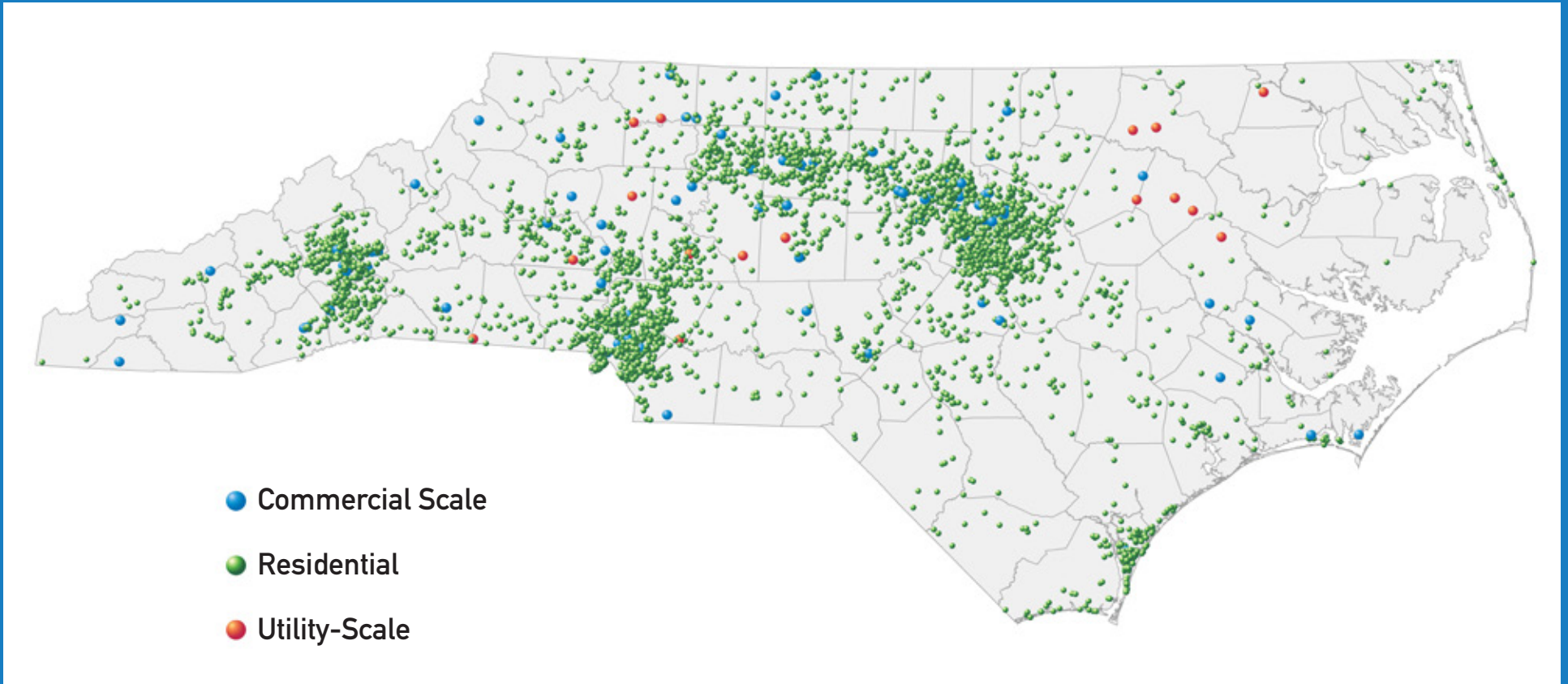
INFORM: Capturing Data



This chart shows the total number of solar PV installations for each year from 2015 through November 2019. The growth seen in the last two years can be attributed to a dramatic increase in the number of residential solar PV registrations due to the Solar Rebate Program.



INFORM: Capturing Data



This map shows the registrations of new renewable energy facilities across the state in 2019.



INFORM: Capturing Data

PROPERTY TAX STUDY

- In 2019, we continued to use data to demonstrate what we know about clean energy—that it is the best choice for North Carolina consumers.
- For the first time, NCSEA released a report on the impact of solar development on property tax income for 50 counties in North Carolina. We were not disappointed: **properties that developed solar saw a nearly 2,000 percent increase in tax revenue.**

CLEAN ENERGY INDUSTRY CENSUS AND ECONOMIC IMPACT ANALYSIS

- We released the 10th edition of our Clean Energy Industry Census in 2019. Since we pioneered the first state-based Clean Energy Industry Census in 2008, the annual census tells a tremendous story of statewide economic growth that few imagined in 2008.
 - The Clean Energy Industry in North Carolina now boasts participation by approximately **1,700 companies**, provides more than **43,000 jobs**, and generates over **\$14 billion** in annual revenue.
- We released the 2019 update to our Economic Impact Analysis of Clean Energy Development in North Carolina. This report finds that the total economic impact in North Carolina from clean energy (**renewable energy and energy efficiency**) **project development from 2007-2018 was \$28.2 billion.**

\$14
BILLION
in Revenue

43,238
JOB





INFORM: **Unlocking Barriers**

Throughout 2019, NCSEA further devoted ourselves to easing the disproportionately high energy burden faced by disadvantaged areas in the Southeast.

As of the close of 2019, our **Energy Solutions Reserve Fund (ESRF)** supports the operations of three tariffed on-bill (TOB) energy efficiency programs offered by utilities in North Carolina, Arkansas, and Tennessee.

We stepped up when we realized that some utilities in the program require additional support to ensure the successful launch of their inclusive energy programs. Now, NCSEA offers a suite of services for utilities that includes marketing, data analytics, grant writing support, and more.

By supporting TOB, in 2019 NCSEA helped unlock access to much-needed residential energy efficiency upgrades for low-income communities.

TOB provides upgrades at no upfront cost and an immediate cash flow positive scenario for the customer.



INFORM: Spreading Awareness

Throughout 2019, NCSEA convened our business members on a bi-weekly basis to share important regulatory, policy, and programmatic updates as well as dialogue with our members on the issues they faced in real time. These calls provided members with routine opportunities to have their questions answered and issues heard by their peers and numerous NCSEA team members, while receiving information about key topics such as:

Legislative and policy updates, such as the status of Senate Bill 559

Updates from NCSEA's Executive Director

25
Hour-long
Calls in 2019



Regulatory updates on key NCSEA and partner filings in relevant dockets such as Interconnection, Avoided Cost, and others

Important meetings or events



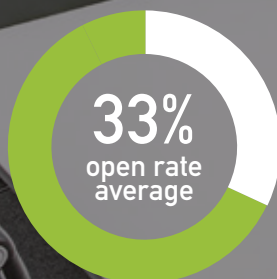
INFORM: Spreading Awareness

In 2019, we used both new and established techniques to tell the story of North Carolina's clean energy landscape.

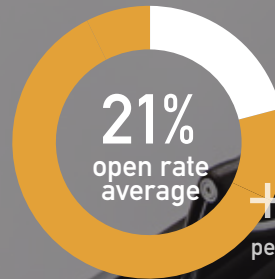
NCSEA sent over 70 newsletters to our subscribers with just under half of these newsletters reaching over 4,000 people! Even with such a large audience, our newsletters consistently achieve higher-than-average open rates for non-profit organizations, with **an average open rate of 28.6 percent** (2.2 percent over the national average)!

We shared timely topics with members in **Clean Energy Insights**; promoted new members and shared how clean energy impacts the daily life of North Carolinians in **Clean Energy Storyteller**; advertised NCSEA and partner events in **Clean Energy Events Radar**; and navigated the (very long) long session at the North Carolina General Assembly in **Clean Energy Policy Update**.

Clean Energy Insights

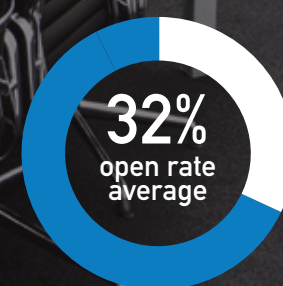


Clean Energy Storyteller



sent to
+4,000
people on average

Policy Update





INFORM: Spreading Awareness

WE PUBLISHED REPORTS AND INFOGRAPHICS ON OUR WEBSITE

- Economic Impact Analysis of Clean Energy Development in North Carolina—2019 Update RTI
- Celebrating Clean Energy-Powered Places of Worship Infographic
- 2018 North Carolina Clean Energy Industry Census
- Increased North Carolina County Tax Revenue from Solar Development
- Consumer Guide to Solar Electricity for the North Carolina Homeowner

WE CREATED A PODCAST

The Squeaky Clean Energy Podcast was **played over 9,000 times** in over 50 countries in 2019, and featured NC Governor Roy Cooper, NC DEQ Secretary Michael Regan, NBA All-Star David West, The Energy Gang's Katherine Hamilton, and representatives from Google, Microsoft, and JP Morgan.

WE DEVELOPED A GLOSSARY OF TERMS

The Glossary of Terms is designed to help bring the very acronym heavy world of clean energy into the hands of everyday North Carolinians.

the
Squeaky
Clean Energy
podcast by NCSEA



Connect

CONVENING | JOINING | NETWORKING

NCSEA continues to prioritize connection in our work. Whether in the office or out in the community, we spent 2019 with our people—our members, partners, and friends. We enjoyed connecting with fellow clean energy supporters, watching as their businesses, goals, understanding, participation, and careers advanced through partnerships.



CONNECT: **Convening**

In 2019, NCSEA spent countless hours amplifying the work of our members, partners, and stakeholders to ensure that our network became your network. We were at events and conferences all year connecting with clean energy professionals, including:

- American Council for an Energy-Efficient Economy Rural Energy Conference
- Appalachian State University Energy Summit & Mid-Year Meeting
- Energy Storage Association events
- North Carolina State Energy Conference
- Rocky Mountain Institute's eLab Summit
- Solar Power International
- Southeast Energy Efficiency Alliance Annual Conference
- Southeast Renewable Energy Summit
- University of North Carolina Clean Tech Summit



CONNECT: **Convening**

We are incredibly proud of our clean energy community. Throughout 2019 we worked to ensure that the voices of our members and partners were heard in front of key audiences—leading discussions, guiding policy decisions, and sharing their expertise.

Over the course of 2019, NCSEA helped place our members and partners at numerous events all over the country so that North Carolina's interests were always considered and promoted.



CONNECT: Convening

In 2019, we hosted **eight events**, of all varieties, that provided our community with an opportunity to come together and connect.

- We learned about clean energy law in the Southeast at our Continuing Legal Education (CLE) Course;
- We gathered with legislators to recognize their achievements and thank them for supporting a clean energy economy;
- We celebrated (**four times!**) the women in our clean energy community at our Women in Clean Energy networking events in Raleigh, Asheville, Durham, and Charlotte;
- We danced the night away and recognized outstanding member achievements with NCSEA's nearest and dearest friends at the Powering Our Future Gala; and
- We brought our members together to review the successes of the last year and the work ahead at our Annual Member Meeting.



CONNECT: Convening

In 2019, NCSEA's Business Members came together during our sector group meetings to dialogue on strategies for success and removing barriers to each sector's development in North Carolina.

THE SECTOR AND WORKING GROUPS WE CONVENED IN 2019 INCLUDE:



Electric
Vehicles
(EV)



Energy
Storage



Local
Government
& Solar



Residential/
Commercial
Solar



Utility-
Scale
Solar



CONNECT: **Joining**

Our members are the heart of NCSEA, and we spent 2019 laser-focused on ensuring that we provide as much value to our members as they provide to us.

IN 2019, WE PRESENTED SEVEN DIFFERENT MEMBERS WITH AWARDS

Lifetime Achievement Award: Maria Kingery

North Carolina Clean Energy Leadership Award: Zoë Gamble Hanes

Community Impact Award: Coastal Credit Union, presented to Creighton Blackwell

Clean Energy Innovator Award: The Nature Conservancy

Business Clean Energy Leader Award: Birdseye Renewables

Individual Clean Energy Leader Award: Tyler Norris, Cypress Creek Renewables

Promoting Diversity and Inclusion in Clean Energy Award: Al Ripley, North Carolina Justice Center



CONNECT: **Joining**

We worked throughout 2019 to update our member benefits. We hope these benefits reflect the gratitude we feel towards our members, and are valuable tools in advancing their businesses and careers.

The screenshot shows the NC Sustainable Energy Association website. At the top is a navigation bar with social media icons and links for Member Login, Donate, Join NCSEA, Subscribe, and Contact Us. Below this is a header with the NCSEA logo and a search bar. The main content area is titled "Find Your Place with NCSEA" and includes the text "Join over 5,000 members helping to advance our clean energy future." Below this are six circular icons representing different membership categories: Students (graduation cap), Individual (person), Government, Education, and Non-profit (heart), Business Basic (house), Business Advanced Small (building), and Business Advanced Large (taller building). At the bottom, two larger boxes highlight specific membership options: "Individual" for \$75/year with a "Student Discount: \$25/year" and "Government, Education, and Non-profit" for \$200/year.

Membership Category	Annual Fee	Additional Information
Individual	\$75/year	Student Discount: \$25/year
Government, Education, and Non-profit	\$200/year	

We are excited to reflect on these new benefits in next year's annual report.



CONNECT: Networking

2019 was another **successful** year for NCSEA's Women in Clean Energy (WICE) project. The goal of WICE is to foster a network of support, camaraderie, and opportunity for self-identifying women in the North Carolina clean energy community. Using the concept of "***we cannot be what we cannot see,***" WICE has endeavored to bring women in the clean energy system together to meet and interact with each other, so that they know who and where their fellow women are in this space.

Women in Clean Energy

In 2019, we laid the groundwork for a WICE Mentorship Program, which will launch in February 2020 with an inaugural class of **almost 40 participants!**



Through sponsorship by NCSEA, one young woman from a low-income household in North Carolina was able to attend an environmental leadership summer camp at a local university.



At the end of 2019, our WICE distribution list had **350+ women** with more and more women still joining.





CONNECT: Networking

49,310
website
visits

With over 43,238 clean energy jobs in North Carolina, the clean energy industry is clearly thriving. However, NCSEA is excited to be a part of growing that number! As in prior years, in 2019 the **Career Center on our website** was the top-visited page across our entire website.

Employing a stellar group of **eight interns** from across five North Carolina universities at various points throughout 2019, we saw what the future of the clean energy workforce looks like, and we cannot wait to watch them move forward and tackle the most pressing challenges facing our energy system today.



CONNECT: **Networking**

We are heavily invested in building relationships with students and the schools molding them into clean energy leaders. We provided guest lectures at several North Carolina institutions including: North Carolina State University, Appalachian State University, and Duke University. And, as in previous years, we sponsored the Appalachian State University Energy Student Summit, State Energy Conference, and the University of North Carolina at Chapel Hill Clean Tech Summit.



Advocate

The North Carolina General Assembly convened a long session in 2019, and NCSEA was there every day of the nearly **300 day session** to advocate for smart public policies that consider the diverse needs of North Carolina consumers and support the growth of our state's clean energy economy. On both the legislative and regulatory fronts, we fought tirelessly with our partners to protect the interests of North Carolina energy consumers and businesses.



Fun Fact: NCSEA made a total of **2,971 pages of filings** at the North Carolina Utilities Commission and the Federal Energy Regulatory Commission in 2019.

2,971
pages



OUR 2019 POLICY AND REGULATORY SUCCESSES INCLUDE:

- Preventing Senate Bill 559 (Duke Energy's multi-year ratemaking bill) from becoming law.
 - The months long effort required to protect ratepayers by keeping Duke Energy accountable demonstrated the strength of our coalition.
- Seeing the North Carolina Utilities Commission deny the majority of Duke Energy's 2019-2020 Integrated Resource Plans.
 - NCSEA demonstrated with our Synapse Study and alternative partial IRP proposal that Duke Energy's status-quo is no longer the cheapest option available for North Carolina energy consumers.
- Watching Senate Bill 377 (proposed wind moratorium) undergo a major overhaul and ultimately die after extensive negotiations among legislators and partners—saving North Carolina's burgeoning wind energy landscape.
- Engaging in meaningful strategic conversations with partners throughout the Executive Order 80 stakeholder process, and ending 2019 with data and a plan to move forward.
 - North Carolina Clean Energy Plan-Department of Environmental Quality
 - North Carolina Zero-Emission Vehicle Plan-Department of Transportation
 - Clean Energy and Clean Transportation in North Carolina Workforce Assessment-Department of Commerce

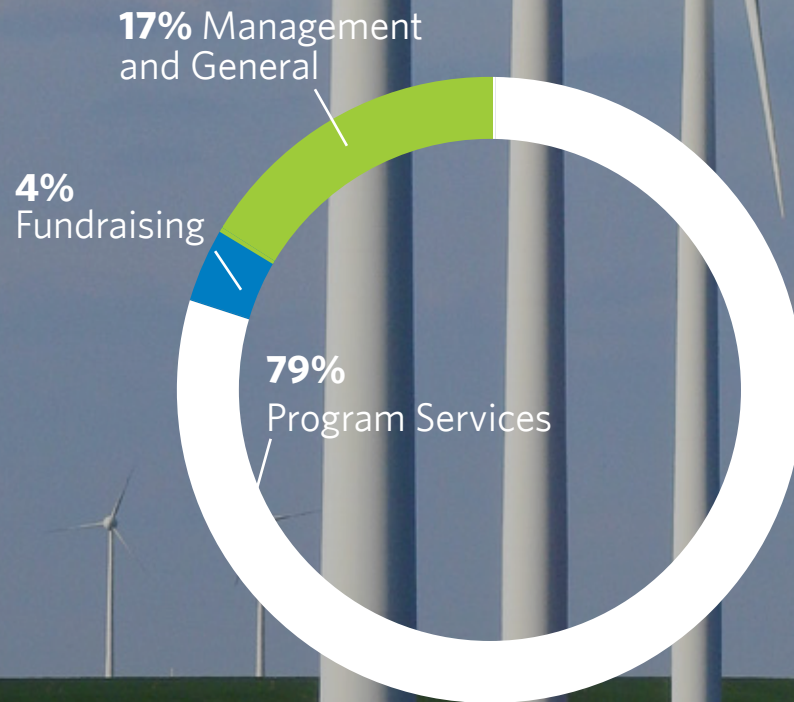


2020 GOALS

- Measurably improve the affordability and accessibility of each renewable resource, energy storage, electric vehicle infrastructure, energy efficiency, and sustainable buildings solutions.
- Increase the portion of electric generation from clean renewable sources to 14 percent, representing a 9 percent increase in renewable energy generation.
- Engage in collaborative dialogue to cultivate alignment on regulatory reform policy options.
- Through our Market Solutions and Equity, Diversity, and Inclusiveness program work, directly and measurably reduce the energy burden faced by low-income consumers across North Carolina.
- Advance our programmatic objectives at the NC General Assembly and NC Utilities Commission:
 - Further clarify rules of the road for energy storage market development
 - Resolve barriers to electric vehicle infrastructure deployment and electric vehicle use
 - Advance critical improvements to the Solar Rebate Program
 - Make progress on resolving interconnection issues for solar
 - Increase North Carolina's energy and water savings goals in state government buildings
 - Create opportunity for more community solar to become available in 2020
 - Improve consumer access to their electricity data
- Better enable corporations to affordably achieve their clean energy objectives.
- Strengthen our community by engaging and involving a great diversity of members, program partners, event participants, event speakers, and donors.
- Continue to build NCSEA's culture of philanthropy and delivering value to all of our members.



FINANCIALS SUMMARY



REVENUE AND SUPPORT

Grants	\$751,130.00
Direct Public Support	\$1,279,971.00
Indirect Public Support	\$320,777.00
Sponsorship	\$5,300.00
Membership	\$133,444.00
Program Income	\$110,807.00
Interest Income	\$8,337.00
MISC Income	\$371.00
Total Revenue	\$2,609,867.00

EXPENSES

Management and General	\$454,980.00
Fundraising	\$108,301.00
Program Services	\$2,161,757.00
TOTAL EXPENSES	\$2,725,038.00
Net Assets - Beginning of Year	\$1,438,679.00
Net Assets - End of Year	\$1,323,509.00
Change in Net Assets	- \$115,170.00



THANK YOU

Thank you to our major donors, grant funders, partners, and members. Our success would not be possible without you.

Major Donors & Partners

Foundation for the Carolinas
Energy Foundation
Coastal Credit Union
Z.Smith Reynolds Foundation Inc.

Upper Coastal Plain
Merck Family Fund
Green Tech Action Fund



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Thank you to our 2019 Board of Directors:

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376
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