



NC SUSTAINABLE
ENERGY ASSOCIATION

A LETTER FROM THE EXECUTIVE DIRECTOR



2016 was a significant year of transition for both the NC Sustainable Energy Association and our state's clean energy economy. NCSEA starts our 39th year stronger, more capable, and better positioned to advance clean energy on all fronts than at any time in NCSEA's modern history. NCSEA stands ready to deliver on our commitment to make clean energy work for all North Carolina – consumers, industry, utilities and our government statewide.

Inside NCSEA, our team and Board transitioned to an entrepreneurial business model, focusing on our highest and best contributions, creating value daily with and for each of you as our 'customers.' We added a collective 52 years of relevant career experience to our accomplished staff team. Thanks to many of our members and supporters, NCSEA's funding support is diversifying and growing around our new and existing programs. We have formalized and scaled up the way we communicate with you, now reaching 1.6 million North Carolinians through our new Communications Hub, and telling your stories with our nationally recognized Story of Clean Energy campaign.

Across our great state, clean energy has become a beneficial and critical part of our landscape, our culture, and our economic opportunity. In nearly every county clean energy now puts food on the table for North Carolina families and businesses, driving billions in new private investments while contributing more in local tax revenues that pay for schools and the services we all depend on each day. All electricity customers are benefiting as clean energy development continues to slow the rise in our electricity rates. The first wind farm in the southeast will soon be online, and utilities have fully complied with the Renewable Energy and Efficiency Portfolio Standard five years ahead of schedule at half the cost. NC is now #2 in installed solar capacity and energy efficiency remains dominant.

NCSEA seized every opportunity to learn, lead and succeed together, because we know as well as most that underneath our shared accomplishments much work remains to be done. In each of the past twelve months, our team invested heavily in spending time with you – convening members and stakeholders to identify challenges and immediate steps forward for both emerging and established clean energy solutions. We learned where challenges remain for customer owned solar, geothermal, bioenergy and utility scale solar, and we laid the groundwork for significant policy and market improvements in 2017.

A key part of leadership is building trust and dialogue. NCSEA launched new programs in energy storage, customer-owned solar, biogas, energy efficiency, solar and agriculture, and wind power, involving utilities, industry, consumer advocates and decision-makers. Our Utility Solutions Program is growing rapidly with generous support from our largest funders and a grant from the US Department of Energy. NCSEA now also works outside of public policy with our utilities, proving out leading edge data driven solutions that can enable utilities to solve their business model challenges around clean energy through delivery of customer savings and service.

On behalf of NCSEA, thank you for the role you play in our affordable, resilient and increasingly clean energy economy. The best is yet to come!

Sincerely,

A handwritten signature in black ink that reads "Ivan Urlaub". The signature is written in a cursive, flowing style.

Ivan Urlaub
NCSEA Executive Director

2016 BY THE NUMBERS

163,506
WEBSITE VISITS

10 INTERNS

18 POLICY WINS

34,294 CLEAN ENERGY JOBS IN NC

74 NCSEA
SPEAKING
APPEARANCES

38 YEARS AND COUNTING

31% GROWTH
IN NC CLEAN
ENERGY JOBS
SINCE 2015

NC CLEAN
ENERGY REVENUE
IN EXCESS OF
6.4 BILLION

10TH YEAR
OF CONSECUTIVE
GROWTH IN NC

OVER 1,300
EVENT
ATTENDEES

8TH ANNUAL MAKING ENERGY WORK

5 AWARDS AND ACCREDITATIONS

NC RANKED 2ND
IN INSTALLED
SOLAR CAPACITY

2,738
MEMBERS

17 EVENTS
HOSTED BY
NCSEA

NORTH CAROLINA'S CLEAN ENERGY ECONOMY 2016 HIGHLIGHTS

34,294
FULL TIME JOBS
in North Carolina
* Full-Time Equivalent

\$6.4
BILLION
in NC Revenue

SEEING ALL NORTH CAROLINIANS IN CLEAN ENERGY

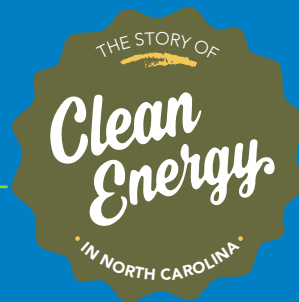
In 2016, NCSEA launched 'The Story of Clean Energy' campaign, telling the many and diverse clean energy stories of North Carolinians across our great state. There are many more stories to be told in 2017, and we encourage you to help us tell in the coming year.

LEGAL AND FINANCE EDUCATION

NCSEA helped lead a collaborative effort with some of North Carolina's most experienced utility legal experts to create a utilities law specialization within the North Carolina State Bar, and two of NCSEA's attorneys were among the inaugural class of specialists. In addition, NCSEA's second annual Continuing Legal Education event on renewable energy law and clean energy finance event for accounting CPE credit each received high marks from attendees from across the Southeast.

10 YEARS STRONG AND GROWING

Thanks in part to the hard work of NCSEA members and staff throughout 2016, North Carolina's clean energy industry experienced its 10th consecutive year of industry growth with 34,294 jobs and \$6.4 billion in annual clean energy industry revenues.



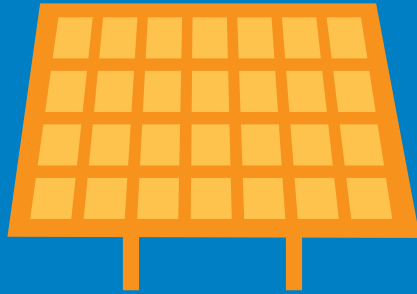
DEFINING PROBLEMS AND ADVANCING SOLUTIONS

NCSEA convened representatives from the energy storage, customer-owned and large scale solar, wind, bioenergy, and geothermal sectors to participate in ongoing "working group" discussions about the current state of the industry, policy and pathways forward for affordable clean energy in North Carolina.

LEGISLATIVE SUPPORT FOR CLEAN ENERGY

NCSEA's work connects state and local decision-makers with the clean energy workers, investors, business leaders and resources in their communities and beyond. In 2016, our state's leaders worked with NCSEA to successfully prevent all harmful policy proposals from becoming law and began exploring positive policy options for 2017.



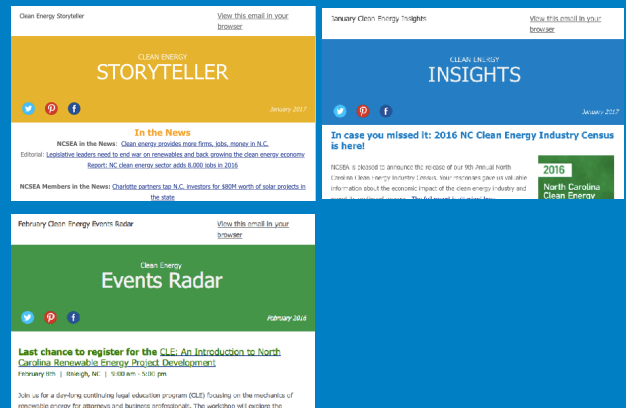


SOLAR LEADERSHIP

While North Carolina has been a pioneer for decades in passive solar design and high performance building, in 2016 we surpassed Arizona to become #2 in installed solar PV generating capacity with more than 2,000 Megawatts (MW) of installed solar capacity – 53 MW of which is customer owned rooftop solar.

NEW & IMPROVED NEWSLETTERS

NCSEA overhauled our email communications in 2016 with great results, replacing our general newsletter with three monthly newsletters tailored to our unique members and subscribers: The Clean Energy Storyteller, Clean Energy Events Radar, and Clean Energy Insights.



STRONG TEAM OF EXPERIENCED LEADERS

NCSEA added 52 additional years of direct career experience to our team, which quickly translated into increased collaboration, problem solving and impact with our members, partners and stakeholders. NCSEA staff also completed our fourth year as a lab team participant in the Rocky Mountain Institute's Electricity Innovations Laboratory, known as e-Lab.

UTILITY SOLUTIONS PROGRAM AT THE LEADING EDGE

NCSEA designed and launched our innovative new Utility Program. We have started working with several North Carolina utilities to test new data-driven approaches to identify clean energy and business model options that can be beneficial for both utilities and their customers.

INCLUSIVENESS INITIATIVE

NCSEA launched our new Inclusiveness Initiative, to ensure the work of NCSEA and our members is advancing opportunities for all North Carolinians to participate in and directly benefit from our clean energy economy.



FINANCIAL SUMMARY

REVENUE AND SUPPORT	
Contributions	\$1,954,895
Miscellaneous	\$2,596
Program Service Fees	\$150,712
Interest Income	\$3,065
Total Revenues	\$2,111,268

EXPENSES	
Program Services	\$1,798,788
Management and General	\$726,353
Fundraising	\$92,014
Total Expenses	\$2,617,155
Net Assets - Beginning of Year	\$1,602,483
Net Assets - End of Year	\$1,152,801
Change in Net Assets	-\$449,682

MAJOR FUNDERS

Thank you to our major funders. Our success would not be possible without you.

Fred & Alice Stanback

The Energy Foundation

U.S. Department of Energy

Z. Smith Reynolds Foundation

FLS Energy

Coastal Federal Credit Union

Cypress Creek Renewables

Green Tech Action Fund

DONATE TO NCSEA

The NC Sustainable Energy Association is a 501(c)(3) membership organization. Please consider making a tax-deductible donation to NCSEA today! Your support will help NCSEA advance the work that ensures a sustainable and secure clean energy future for all of us. **To donate go to www.energync.org.**

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OFFICE ADMINISTRATOR

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Owen Smith

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NCSEA's 2017 Board members

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Subscribe to the NCSEA's monthly newsletters, the Clean Energy Insights, the Clean Energy Storyteller, and the Clean Energy Events Radar, filled with timely information about our work, our members, and upcoming events.

Find NCSEA on Facebook, Twitter, and LinkedIn.



THANK YOU!

NC Sustainable Energy Association extends its sincere thanks and appreciation to our many members, donors, funders, sponsors, partners and volunteers. We feel privileged to work on behalf of North Carolina's clean energy sector, which would not be possible without your continued support.



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The North Carolina Sustainable Energy Association (NCSEA) is a 501(c)(3) nonprofit membership organization working daily to promote the interests of North Carolina, its residents, businesses and economy by ensuring a sustainable path for the growth of clean energy. Collectively, renewable energy, energy efficiency, smart grid technologies and plug-in electric vehicles are powerful drivers of jobs, innovation, economic prosperity and energy security for the state and region. Informed by principle and bolstered by rich data, careful analysis and strategic advocacy, NCSEA drives the creation of a market and policy environment that fosters solutions, progress and opportunity for all clean energy stakeholders.