

## SOUTHEAST CLEAN ENERGY INDUSTRIES CENSUS 2013

Thank you for participating in the 1st annual Southeast Clean Energy Industries Census. The goal of the Census is to understand the employment and industry dynamics of organizations working in various capacities within the clean energy sector. For the purpose of this Census, **clean energy refers to renewables, energy efficiency, and alternative vehicle fuels (not petroleum or conventional diesel)**. This Census looks specifically at the following nine focus areas across eight business activities:

Business Focuses	Business Activities
<ul style="list-style-type: none"> <li>➤ Solar</li> <li>➤ Wind</li> <li>➤ Biomass</li> <li>➤ Hydroelectric</li> <li>➤ Geothermal / ground source heat pumps</li> <li>➤ Smart grid or AMI/AMR infrastructure</li> <li>➤ Energy efficiency / building sciences</li> <li>➤ Energy storage (including fuel cells)</li> <li>➤ Alternative fuels or clean fuel vehicle conversion (including infrastructure and components)</li> </ul>	<ul style="list-style-type: none"> <li>➤ Research and development</li> <li>➤ Manufacturing and/or production</li> <li>➤ New energy efficient design and construction</li> <li>➤ Energy efficiency retrofitting of existing buildings</li> <li>➤ Renewable energy systems retailer or distributor</li> <li>➤ Renewable energy systems installer, designer, or developer</li> <li>➤ Power generation owner or operator</li> <li>➤ Education, services, and consulting</li> </ul>

The Census is 21 questions, requires approximately 30 minutes to complete, and can be completed across multiple sittings. **ALL CONTACT INFORMATION AND ANSWERS YOU PROVIDE ARE KEPT STRICTLY CONFIDENTIAL.** The results are published in aggregate as a freely available online report following the completion of the Census. Individual organization information is never released publically or privately and is not sold, remarketed, or used in any way that would compromise an organization's anonymity.

If you have any questions or concerns regarding the Census please contact the 2013 Census Project Manager directly; contact information can be found below and at the bottom of each survey page

**North Carolina:**  
**Ms. Miriam Makhyoun**  
 North Carolina Sustainable Energy Association  
[Census@energync.org](mailto:Census@energync.org)  
 919-832-7601 extension 114

**Georgia:**  
**Ms. Joy Hinkle**  
 Southface  
[jhinkle@southface.org](mailto:jhinkle@southface.org)  
 404-604-3634

**South Carolina:**  
**Mr. Andrew Epting**  
 South Carolina Clean Energy Business Alliance  
[Andrew@SCCEBA.Biz](mailto:Andrew@SCCEBA.Biz)  
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**Virginia:**  
**Mr. Bill Greenleaf**  
 Virginia Energy Efficiency Council  
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 804-525-7657

***For questions or assistance please contact:***

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**1. Please complete or verify your organization's name and website.**

Organization Name \_\_\_\_\_

Website \_\_\_\_\_

*Format <http://www.name.domain>*

**2. a) Does your organization have at least one employee in Georgia, North Carolina, Virginia, or South Carolina dedicating a portion of time to clean energy in the business activities and focuses in the matrix below?  
[SELECT ONLY ONE RESPONSE]**

Business Focuses	Business Activities
<ul style="list-style-type: none"> <li>➤ Solar</li> <li>➤ Wind</li> <li>➤ Biomass</li> <li>➤ Hydroelectric</li> <li>➤ Geothermal/ground source heat pumps</li> <li>➤ Smart grid or AMI/AMR infrastructure</li> <li>➤ Energy efficiency/building sciences</li> <li>➤ Energy storage (including fuel cells)</li> <li>➤ Alternative fuels or clean fuel vehicle conversion (including infrastructure and components)</li> </ul>	<ul style="list-style-type: none"> <li>➤ Research and development</li> <li>➤ Manufacturing and/or production</li> <li>➤ New energy efficient design and construction</li> <li>➤ Energy efficiency retrofitting of existing buildings</li> <li>➤ Renewable energy systems retailer or distributor</li> <li>➤ Renewable energy systems installer, designer, or developer</li> <li>➤ Power generation owner or operator</li> <li>➤ Education, services, and consulting</li> </ul>

<input type="checkbox"/>	<b>YES:</b> I will complete the 2013 Census. <b>[SKIP TO Q3]</b>
<input type="checkbox"/>	<b>YES:</b> My organization does meet the criteria, but I am unable to participate in the 2013 Census.
<input type="checkbox"/>	<b>NO:</b> My organization does not meet the criteria. <b>[GO TO B]</b>
<input type="checkbox"/>	<b>NO:</b> My organization does not meet the above criteria, but I would like to participate in the Census to share my industry expertise and perceptions. <b>[SKIP TO Q3]</b>

**b) If you answered “No” please indicate the reason you do not meet the criteria so that the Census team can determine whether to check with you in 2014 or remove your organization from our list of clean energy organizations. [SELECT ONE RESPONSE OR SPECIFY OTHER]**

<input type="checkbox"/>	My organization no longer conducts business related to clean energy in Georgia, North Carolina, South Carolina, or Virginia <i>(Example: Energy Star certified builder, but no longer building Energy Star homes)</i>
<input type="checkbox"/>	The organization is no longer in business.
<input type="checkbox"/>	I am no longer employed at the organization.
<input type="checkbox"/>	My organization does not meet the criteria this year; please check with me again in 2014.
<input type="checkbox"/>	Other reason <b>[SPECIFY]</b> _____ _____ _____

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**3. Please complete or verify your professional contact information.**

Contact information is kept confidential and used ONLY for annual Southeast Clean Energy Industries Census.

Prefix \_\_\_\_\_

First Name \_\_\_\_\_

Last Name \_\_\_\_\_

Job Title \_\_\_\_\_

Business Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip Code \_\_\_\_\_

Business Email \_\_\_\_\_

Business Phone \_\_\_\_\_

**4. Please complete or verify an alternate contact within your organization in the event we are unable to reach you in a future annual Southeast Clean Energy Industries Census.**

Person will only be contacted in the event we are unable to reach you for a Census.

Prefix \_\_\_\_\_

First Name \_\_\_\_\_

Last Name \_\_\_\_\_

Job Title \_\_\_\_\_

Business Email \_\_\_\_\_

Business Phone \_\_\_\_\_

**5. If you know your North American Industry Classification System (NAICS) Code(s), please enter them here.**  
Visit [this link](#) for more information.

\_\_\_\_\_

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6. For each business focus listed below, please indicate which of the business activities your organization conducts.  
[SELECT ALL ACTIVITIES THAT APPLY FOR EACH FOCUS AREA]

Business Focus	Business Activity							
	Research and development	Manufacturing and/or production	New energy efficient design and construction	Energy efficiency retrofitting of existing buildings	Renewable energy systems retailer or distributor	Renewable energy systems installer, designer, or developer	Power generation owner or operator	Education, services, and consulting
Solar								
Wind								
Biomass								
Hydroelectric								
Geothermal/ground source heat pumps								
Smart grid or AMI/AMR infrastructure								
Energy efficiency/building sciences								
Energy storage (including fuel cells)								
Alternative fuels or clean fuel vehicle conversion (including infrastructure and components)								

7. Please indicate the states and cities where your organization has an office that conducts clean energy activities.

	North Carolina	South Carolina	Georgia	Virginia
a) State in which your organization conducts clean energy. [CHECK ALL STATES THAT APPLY]				

b) Primary clean energy office located in city of: [SPECIFY PRIMARY CITY FOR EACH RELEVANT STATE]	
North Carolina	
South Carolina	
Georgia	
Virginia	

c) Additional clean energy offices located in city/cities of: [SPECIFY ALL CITIES FOR EACH RELEVANT STATE]	
North Carolina	
South Carolina	
Georgia	
Virginia	

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8. Within each state, please estimate the percent of clean energy staff time allocated to the following business focuses. [ROUND TO WHOLE NUMBER; COLUMN PERCENTAGES SHOULD ADD TO 100%]

	North Carolina	South Carolina	Georgia	Virginia
Solar				
Wind				
Biomass				
Hydroelectric				
Geothermal/ground source heat pumps				
Smart grid or AMI/AMR infrastructure				
Energy efficiency/building sciences				
Energy storage (including fuel cells)				
Alternative fuels or clean fuel vehicle conversion (including infrastructure and components)				
	100%	100%	100%	100%

9. Within each state, please estimate the percent of your organization's clean energy staff time allocated to the following business activities. [ROUND TO WHOLE NUMBER.; COLUMN PERCENTAGES SHOULD ADD TO 100%]

	North Carolina	South Carolina	Georgia	Virginia
Research and development				
Manufacturing and/or production				
New energy efficient design and construction				
Energy efficiency retrofitting of existing buildings				
Renewable energy systems retailer or distributor				
Renewable energy systems installer, designer, or developer				
Power generation owner or operator				
Education, services, and consulting (e.g., law, engineering, finance)				
	100%	100%	100%	100%

10. For each applicable state please indicate (or verify) the approximate year your organization. [ENTER THE NUMBER 1 IF YOU DO NOT KNOW THE APPROXIMATE YEAR BUT ARE ACTIVE IN THE STATE]

	North Carolina	South Carolina	Georgia	Virginia
a. First established a physical office location				
b. Entered the state's clean energy industries				

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11. For each applicable state, please estimate your organization's full time equivalent (FTE) employment. [Please estimate based on the full-time equivalent staff time (for example, two employees working half-time equal one full time equivalent and one FTE is equivalent to 30 hours per week)]

	North Carolina	South Carolina	Georgia	Virginia
Number of FTE employees in:				

12. For each applicable state, please estimate the average annual percent of time spent by in-state employees on clean energy activities. [ENTER NUMBER FOR EACH RELEVANT STATE]

	North Carolina	South Carolina	Georgia	Virginia
Percent of time dedicated to clean energy activities by employees in:	%	%	%	%

13. For each applicable state, what is the anticipated change in your organization's clean energy jobs over the next 12 months? [SELECT ONE FOR EACH RELEVANT STATE]

	North Carolina	South Carolina	Georgia	Virginia
Very likely to <b>add</b> clean energy jobs				
Somewhat likely to <b>add</b> clean energy jobs				
Remain unchanged				
Somewhat likely to <b>reduce</b> clean energy jobs				
Very likely to <b>reduce</b> clean energy jobs				
Do not know/unsure				

14. For each applicable state, which of the following factors do you consider when adding or removing clean energy jobs over the next 12 months? [FOR EACH RELEVANT STATE, SELECT ALL FACTORS THAT APPLY]

	North Carolina	South Carolina	Georgia	Virginia
Access to investment				
Access to loans				
Access to incentives				
Access to skilled labor				
Private sector collaboration				
Consumer awareness				
Economic development support				
Access to utility programs				
Other factors [SPECIFY FOR EACH RELEVANT STATE]				

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15. a) For each state in which you conduct business, please select the top three factors that represent a skill gap with respect to your business needs. [SELECT THREE FOR EACH RELEVANT STATE]

	North Carolina	South Carolina	Georgia	Virginia
Customer service/sales				
General maintenance				
Lean/Six Sigma/process				
Office skills				
Electrical systems/wiring				
Energy auditing				
Engineering and design				
Financial analysis				
Accounting				
Weatherization				
High performance building				
Computer programming language				
Software development				

b) Please describe other applied skills gaps, if any, your organization is facing. \_\_\_\_\_

16. For each state where your organization has a physical office location, please estimate the **percent** of your organization's total annual gross revenue within the state that was attributable to the clean energy industries in the last fiscal year. [FOR EACH RELEVANT STATE, ENTER 0 – 100%]

	North Carolina	South Carolina	Georgia	Virginia
<b>Percent</b> of total annual gross revenue from clean energy industries	%	%	%	%

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17. For each state where your organization has a physical office location, please estimate **how much** of your organization's total annual gross revenue within the state was attributable to the clean energy industries in the last fiscal year. [FOR EACH RELEVANT STATE, INDICATE AMOUNT OR ENTER 0 IF NONE]

	North Carolina	South Carolina	Georgia	Virginia
Total annual gross revenue from clean energy industries	\$	\$	\$	\$

If you would prefer not to provide a specific number, please answer using the US Census Bureau's Economic Census revenue categories or to select the "prefer not to answer" option for this question.

	North Carolina	South Carolina	Georgia	Virginia
Less than \$100,000				
\$100,000 to less than \$250,000				
\$250,000 to less than \$500,000				
\$500,000 to less than \$1 million				
\$1 million to less than \$2.5 million				
\$2.5 million to less than \$5 million				
\$5 million to less than \$10 million				
\$10 million to less than \$25 million				
\$25 million to less than \$50 million				
\$50 million to less than \$100 million				
\$100 million to less than \$250 million				
\$250 million to less than \$500 million				
\$500 million or more				
Prefer not to answer				

18. a) In the past 12 months, what percent of your organization's clean energy products and services were provided to customers in: [ROUND TO WHOLE NUMBER; COLUMN TOTAL SHOULD SUM TO 100%]

	North Carolina	South Carolina	Georgia	Virginia
Local markets within 100 miles of the office(s)				
Regional markets within 500 miles of the office(s)				
National markets				
International markets				
	100%	100%	100%	100%

- b) What are the primary domestic and/or international markets for the products or services your state offices offer?

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**19. Please indicate the importance of the following to the success of your organization's clean energy business activities. [SELECT ONE RESPONSE FOR EACH ITEM]**

	Very Important	Somewhat Important	Not Very Important	Do Not Know / Not Applicable
Personal tax incentives				
Corporate tax incentives				
Sales tax incentives				
Property tax incentives				
Rebate programs				
Grant programs				
Loan programs				
Industry recruitment or support programs				
Green/energy efficient building programs				
Performance-based incentive programs				
Manufacturing tax credit				
Improved interconnection process				
Enhanced net metering rules				
Streamlined permitting				
Standardized permitting				
Expanded Federal Renewable Fuels Standard				
Corporate structure (e.g., REITs, MLPs)				
Adoption and enforcement of enhanced building codes				
Third-party sales of electricity				
Third-party leasing				
Improved access to customer energy usage data				
Other very important factor(s) [SPECIFY]				

**20. We would appreciate your suggestions, concerns and general industry observations to inform future Census questions.**

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**21. The 2013 Census summary report will be available online in the fall of 2013. Would you like to be notified directly when the report is available online?**

	Yes and I would also like to be notified about pending legislation, networking events, and other industry news in my states.
	Yes, but I would prefer not to receive additional communications.
	No, please do not contact me until the 2014 Census.

Several hundred organizations have taken the time to share their expertise and insights on the clean energy industries through previous state-level annual Clean Energy Industries Censuses. The reports were read by both state and national decision makers, and the results have been cited in numerous media outlets as essential insight into individual state's clean energy economy. **This first Southeast Clean Energy Industries Census would not be possible without the generous participation from organizations like yours, and the Southeast Clean Energy Industries Census team would like to sincerely thank you for your time and participation in the 2013 Southeast Clean Energy Industries Census.**

Please feel free to contact the Census team at any time to make changes to your organization information, add a new contact, or ask any questions that you may have regarding the Census results. Best of luck in the upcoming business year, and we look forward to contacting you again in June of 2014 for the next annual Southeast Clean Energy Industries Census.

Sincerely,

The 2013 Southeast Clean Energy Industries Census Team

**North Carolina:**

**Ms. Miriam Makhyoun**

**North Carolina Sustainable Energy Association**

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