

# SEIA Annual Report 2018



Solar Energy  
Industries  
Association®

## Introduction

The SEIA team prepared this Annual Report as a means of communicating the association's successes in 2018 and our priorities and deliverables in 2019. We believe the efforts outlined in this report will help us compete against the intensifying efforts of much better-funded opponents who are trying to put a halt to solar growth.

According to GTM Research, there will be \$61.7 billion in solar market opportunity through 2022. This report uses this data and seeks to quantify, to the extent practical, the specific market opportunities that the deliverables are attempting to open or protect. And while SEIA doesn't claim to create these market opportunities alone – in fact, one of our most important assets is our ability to convene regional players and manage cohesive campaigns – SEIA does work effectively with partners to drive policy victories.

**In all cases, 2019 priorities and deliverables are tied directly to SEIA's four strategic objectives: creating new markets while ensuring existing markets remain open; reforming electricity markets to better enable solar use at the highest values; continuing as the voice and market research center for the solar industry; and ensuring SEIA is providing value to its members.**

This year has marked another robust fiscal year for SEIA, with strong dues support and diligent financial stewardship. By keeping our overhead low and channeling our resources toward board-approved advocacy priorities, we continued to maximize the impact of each member dollar invested in SEIA.

As we look to 2019, SEIA remains committed to executing our strategic plan through aggressive efforts to grow revenue and targeted, priority-driven spending.

## Top 7 Priorities

Here are the top seven priorities we aim to accomplish in 2019 and their associated deliverables and potential market value.

### State Affairs – Building & Reforming Markets

- 1 Protecting and expanding solar markets through regulatory proceedings.** SEIA plans to engage in a litany of regulatory proceedings throughout the country in order to protect existing solar markets or create new market opportunities. Winning cases in these states alone would **add to or preserve \$23 billion in opportunity through 2022**. Among state regulatory proceedings we will engage in throughout 2019 are the following (more details in state section):

#### California

- Update IRPs based on SB100
- Establish a standard offer contract under PURPA
- Protect net metering in the NEM3 proceeding
- Advocate for favorable Green Tariff Filing program design
- Obtain pro solar outcome in PG&E rate case
- Obtain pro solar outcome in SDG&E rate case
- Increase NEM 3.0 engagement
- Obtain favorable time-of-use rates in regulatory proceedings

#### Colorado

- Obtain greater solar adoption in Xcel Energy Resource Plan
- Ensure solar friendly regulatory revisions on distribution system planning, qualifying facilities and interconnection proceedings

**Arizona**

- Obtain pro solar outcome in APS 2019 general rate case, if filed

**Texas**

- Obtain pro solar outcome in Centerpoint rate design case
- Obtain pro solar outcome in AEP/NEM rate design case to support pro solar outcome

**Illinois**

- Ensure proper Adjustable Block Program implementation that supports DG and community solar
- Drive program improvements in the 2019 renewable procurement plan
- Define net metering cap trigger and successor tariff compensation

**Michigan**

- Potential intervention in DTE IRP to ensure more solar adoption
- Establish legally enforceable obligation standard for PURPA contracts
- Intervention in interconnection reform docket

**Florida**

- Secure favorable outcome in Florida IOUs solar-only Base Rate Adjustment filing

**North Carolina**

- Support NCCEBA's intervention in the Biennial Avoided Cost Proceeding to ensure avoided cost is calculated fairly to solar

**South Carolina**

- Defeat utility-proposed fixed charge increase
- Improve interconnection for utility-scale projects in grid modernization proceeding
- Obtain capacity value in avoided cost calculation for qualified facilities
- Ensure appropriate implementation of NEM successor tariff, once passed

**Mississippi**

- Maintain full net metering
- Defend against demand charges

**Tennessee**

- Legalize third party ownership
- Establish personal property tax credit for residential systems

**New Jersey**

- Expand the size of community solar pilot projects
- Relax land use restrictions on large-scale solar

**New York**

- Finalize fixes to New York's VDER tariff for larger-scale projects
- Preserve net metering for residential and small commercial customers

**Massachusetts**

- Ensure that SMART rollout is successful and fix lingering issues with implementation
- Oppose proposed Eversource fixed and demand charges

**2 Protecting and expanding solar markets through legislation.** New governors from Colorado, Illinois, Michigan, Maine, Nevada, Wisconsin, Minnesota and New Mexico have called for significant Renewable Portfolio Standards (RPS). SEIA will aggressively lobby for state legislation establishing RPS of up to 100 percent, in selected states. Assuming a 25 percent share of generation for solar, RPSs in these eight states alone would generate **more than \$10 billion a year in revenue** from sales of solar power to the ultimate customer. Currently, the **solar market opportunity in these eight states is about \$8.5 billion through 2022**. Among state legislative actions we are taking are the following (more details in state section):

#### **California**

- Accelerate procurement of utility-scale renewables

#### **Nevada**

- Increase the RPS
- Establish a community solar program
- Pass 704b (large customer energy choice)

#### **New Mexico**

- Increase the RPS
- Secure state tax credit that could help DG companies
- Establish a community solar program

#### **Colorado**

- Increase the RPS
- Improve community solar garden rules
- Enact energy storage legislation

#### **Texas**

- Defend against elimination of tax credit

#### **Illinois**

- Increase the RPS
- Increase funding for solar incentive program
- Challenge state bailouts for coal

#### **Michigan**

- Increase the RPS
- Establish community solar program
- Standardize property tax assessment process
- Restore net metering

#### **South Carolina**

- Establish voluntary corporate procurement program
- Ensure financeable projects by creating more consistent PURPA contract terms
- Establish net metering successor tariff

#### **Virginia**

- Authorize rate design changes to make distributed generation cost-effective

#### **New York**

- Codify a long-term solar goal
- Extend NY Sun program

#### **New Jersey**

- Establish a long-term SREC incentive program

## Federal Affairs – Building & Reforming Markets

- 3 Expanding solar markets through legislation.** SEIA plans to pursue a variety of legislative efforts that create greater opportunity for solar deployment. **These policies could spur (and protect) more than \$15 billion in new investment over the next 5 years.** Among the legislative activities we will undertake in 2019 are the following:
- Pass legislation to apply ITC to storage
  - Secure pro-solar provisions in infrastructure legislation
  - Obtain appropriations for Solar APP
  - Engage in meaningful dialogue and discussion around carbon policy
- 4 Expand and defend solar markets through regulatory proceedings.** This Administration has demonstrated its willingness to utilize the regulatory agencies to attempt to benefit other fuel sources. Active engagement at FERC is critical to ensuring that our industry’s interests are protected. The regulatory work we will engage in at the federal level includes:
- Resolve the Distributed Energy Resource rulemaking
  - Ensure favorable treatment for solar in the storage rule
  - Obtain favorable outcome for solar in any RTO proceedings, such as the PJM repricing rule currently being litigated
  - Ensure that FERC does not allow subsidies for incumbent generators
  - Defend PURPA as necessary
- 5 Reform markets and ensure that solar is properly valued in wholesale markets through engagement in the RTOs.** Working with partners and utilizing our joint resources efficiently, SEIA will pursue RTO policies that value system performance rather than attributes that favor traditional resources. **The efforts outlined in #4 and #5 have a potential value of \$10 billion over the next 5 years.**

## Continuing as the Voice & Research Center for the Industry

- 6** Top priorities are to build public and influencer support for key state and federal policies, increase high-value news hits, place op-eds from supportive third parties in every target state capital, and maintain our lead for social media followers so that we can continue to increase influence. In fulfilling these priorities, we will participate in important policy dialogues with state groups by cultivating relationships with external affairs and we’ll build, or participate in, an alliance with corporate solar groups. In addition, we will promote research products so as to build publicity and generate revenue. **We put the total value of our communications and research at \$25 million.**

## Providing value to members

- 7** In 2019, we plan to grow revenue from current and new members by 10 percent, which will add \$780,000 in revenue, partly through a 10 percent improvement in retention. This follows a four-year pattern of double-digit membership revenue growth. Our new lower-tier dues categories (Basic and Watt) will double the number of small companies in this membership category over the next two years, resulting in **\$1.4 million in additional revenue.**

## Speaking with One Voice

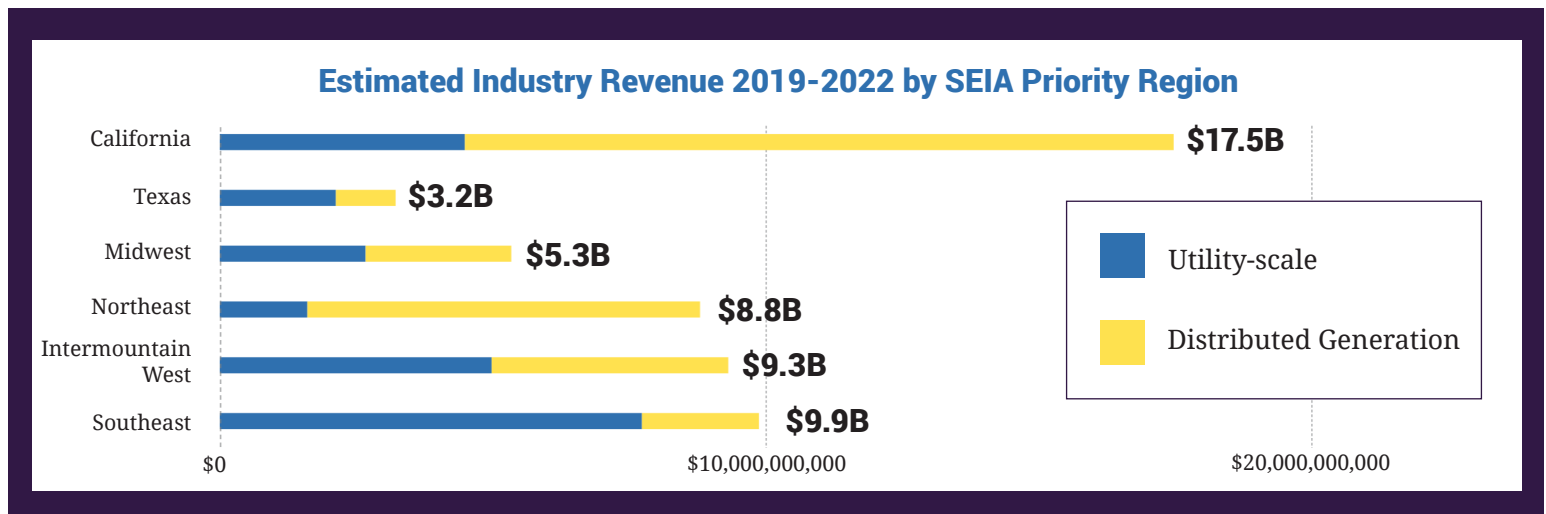
It's been well established that solar is most effective when we speak with one voice and our membership is very balanced when you look at what segments of the industry our members represent. Our polling tells us that people respond better to pro-solar arguments when they are simple and consistent. For these reasons we aim to represent the solar industry writ large. However, we know that each industry segment needs specific advocacy support. We have endeavored to do that and are dedicating Vice President-level staff to support the needs of our utility-scale and distributed generation members.

## State Policy - 2019 Strategic Planning

The 2019 State Affairs budget will maintain spending in the InterMountain West, Northeast, California and Texas at levels close to 2018. However, there will be a significant increase in funding in the Southeast offset by a reduction in funding in the Midwest. To address certain known challenges (e.g., Texas rate cases) and meet our overall policy goals for each region, this budget will require significant co-investment.

We have built an increasingly sophisticated state operation with active SEIA engagement in important battlegrounds, significantly augmented by capable state chapters, our members and other local, regional and national partners. By combining forces in this way, we have built a state lobbying and advocacy force much stronger than any of us could achieve alone.

In 2019, SEIA plans grow our capabilities in several key markets, including funding new legislative efforts in Texas, maintaining our leadership role in the NY Reforming the Energy Vision process and expanding our regulatory presence in the Midwest, including funding a new FTE there, and continuing our regulatory cost-sharing arrangement with our affiliate in Colorado.



# State Policy - 2018 Achievements

## California

### Setting a long-term goal for renewable production

- Passage of 100% clean energy standard including 60% RPS (SB 100).
- Elevated the urgency for near-term procurement of utility scale resources through communications and legislation campaign (AB 893) along with AWEA, LSA and others.
- Passage of wildfire legislation to ensure creditworthy utility off-takers for utility-scale procurement.
- Adoption of 42 PPM use case in CA's IRP, which calls for 9 GW of utility scale solar by 2030.

### Protecting solar markets in rate cases and rate design, and encouraging solar deployment

- Established new rates for solar customers across all rate classes including TOU-lite rate for small customers and Option E for large customers.
- Established new rates for residential and commercial solar+storage customers.

### Increasing solar access and customer choice

- Establishment of a shared solar program for low-income customers.

### Incorporating solar into California's codes and standards

- Established PV mandate for new homes by the CEC.
- Defeated bill that would have required onerous siting requirements for utility scale projects under the Migratory Birds Treaty Act.

### Establishing Reasonable Consumer Protections for Solar Customers

- Created a joint working group with CalSSA to address consumer protection concerns, with particular emphasis on resolving customer complaints in the Central Valley.
- Removal of onerous provisions from CPUC's proposed consumer protection regulations including exemption for tax equity investors and new homes.

### PAC

- SEIA California PAC contributed \$30,000, and facilitated \$230,000 in additional contributions by members and partner organizations.
- Held events with 10 legislators and the Governor-elect.

## Nevada

SEIA endorsed and promoted Question 6, which will increase the RPS standard to 50% by 2030.

## Midwest States

Invited executive directors of MNSEIA and MOSEIA to SEIA Midwest committee calls to discuss ongoing issues in their states and solicit support of SEIA and member companies.

## Arizona

Support for Arizona solar markets continues through participation on the AriSEIA Board.

## Oregon

SEIA contributed to the Resource Value of Solar docket through OSEIA, which will be used to establish a credit for Community Solar projects and potentially NEM. The final decision is expected in 2019.

## Colorado

- SEIA provided an expert witness, Kevin Lucas, in Colorado's Renewable Energy Standard Account docket, advocating to reduce costs and increase transparency in PSCo's proposal.
- SEIA partnered with COSEIA to intervene in a massive rulemaking that will be used to update the energy programs in Colorado.
- SEIA supported a newly enacted DG energy storage bill establishing a customer right to energy storage and preventing the utility from requiring additional metering.

## Illinois

Working with the Illinois Solar Energy Association and the Coalition for Community Solar Access:

- Successfully advocated for crucial design elements in the 666 MW solar incentive program that will support Community Solar and both commercial and residential DG, in the Long Term Renewable Resources Procurement Plan docket.
- Discussed with ICC staff on timing of hitting net metering cap, provided comments based on experience in NY, CA, and MA on design of post-NEM compensation structure.
- Sought and received modifications to standard contract for 1,200 MW utility-scale solar solicitation.
- Secured Order in Smart Inverter Rebate Tariff cases rejecting utility proposals to control and make changes to inverters, which could have caused unquantifiable curtailment.
- Improved prospects for IPA's community solar and C&I REC lottery system prompting ComEd to propose modifications to the interconnection process that benefit developers.

## Southeast States

Strengthened affiliate and partner relationships in the Southeast to utilize SEIA resources efficiently; specifically, contributing to regulatory costs through NCCEBA and lobbying costs through MDV SEIA.

## Florida

- Educated the Florida Public Service Commission on the ratepayer and economic advantages of competitively procured utility scale solar in anticipation of 2019 policy action.
- Sponsored solar + storage pilot program legislation in Florida, maintaining and building on relationships forged in prior year's enactment of SB 90.

## Michigan

- With member company co-investment, intervened in and sponsored expert witness testimony in Consumers Energy' IRP, advocating for fair treatment both for solar projects in the company's proposed competitive procurement process, and QF projects in the interconnection queue.
- Provided policy testimony in DTE's rate case arguing against imposition of high fixed fees and per-kw capacity fees on distributed generation customers, working with ELPC and Vote Solar.

## Massachusetts

- Won major victories in the final SMART Order at the DPU, including rejection of a utility plan to limit credits for community solar customers and collect revenue for the SMART program through a fixed charge. SMART will drive another 1,600 MW of solar development in the Commonwealth.
- Secured legislation to reverse a misguided DPU decision approving a monthly demand charge for residential solar customers in the Eversource territory.
- As part of the same bill, secured legislation increasing the state's RPS to 35%, bringing MA more in line with neighboring states.

## New York

- Helped secure 22 solar projects under New York's first Clean Energy Standard solicitation – the first time utility-scale solar projects received NY REC awards.
- Successfully pressured NY regulators to issue whitepapers and proposals to fix broken elements of the VDER tariff (most notably proposals to fix the demand reduction value) and to extend the VDER Market Transition Credit for community solar firms.

## New Jersey

- Secured passage of the Clean Energy Act in May 2018, which included a major increase in New Jersey's RPS requirements (now 50%) and stabilized the solar market, which was in danger of crashing based on significant oversupply.
- Secured a successor solar incentive program and helped open a new community solar market in New Jersey.

## Virginia

Intervened in Dominion IRP to strategically educate the Virginia State Corporation Commission about the economics of solar and storage, and how they can contribute to a reliable, cost-effective long term energy plan in Virginia.

## South Carolina

Helped create and lead a robust coalition of solar and energy advocates in South Carolina to advance a comprehensive legislative and regulatory proposal to inform the state's clean energy future.

# State Policy - 2019 Goals in Priority States & Regions

## California

**Setting a long-term goal for renewable production. Worth hundreds of billions of dollars over the next several decades**

- Ensure successful SB100 implementation and spur procurement through the IRP process.
- Lobby for legislation to accelerate procurement of utility-scale renewables.
- Secure full capacity value for solar in resource adequacy.

**Protecting solar markets in rate cases and rate design, and encouraging solar deployment**

- SEIA will protect net metering and ensure reasonable NEM 3.0 reforms.
- SDG&E GRC Phase 2: Nail down favorable grandfathering for solar customers; Establish good rates for C&I and solar+storage customers.
- Resi TOU Cases: We will fight for default residential TOU rates that support solar customers and to defeat high fixed charge/minimum bills for residential customers.

**Modernizing the grid in a way that creates a level playing field for solar.**

- Create a solar bill of rights.
- Establish a pilot tariff in NEM 3.0 for shared solar programs.
- Establish a Diversity & Inclusion working group to better track and advance D&I initiatives.

**Incorporating solar into California's codes and standards.**

- Implement CA Building Energy Efficiency Standards (BEES) for solar on new homes.
- Develop BEES for commercial buildings with solar and storage.
- Prevent problematic siting and permitting requirements for utilit- scale solar (e.g. defending against negative legislation).

**Establishing Reasonable Consumer Protections for Solar Customers.**

- Develop a reasonable consumer information packet at the PUC.
- Resolve outstanding consumer complaints in Central Valley and elsewhere.

**PAC:**

- Develop a CA Clean Energy Caucus in coordination with partner trade associations.

## Nevada

SEIA will be active in the 2019 Nevada legislative session. Expected bills include RPS, Community Solar, a revision of 704b (the statute that allows large customers to choose an alternate energy provider) and Community Choice Aggregation.

## Arizona

- Continued support for ArISEIA via Board seat.
- Potential participation in APS rate case and Energy Modernization plan.

## New Mexico

Potential support of RPS legislation, made more likely by election results, with co-funding.

## Colorado

SEIA will remain engaged in Colorado regulatory and legislative issues. We will advocate for regulatory revisions of Distribution System Planning, Interconnection rules, Qualifying Facilities, Renewable Energy Standard and Energy Resource Procurement. We will lobby for clean energy legislation, such as an RPS increase and the expected Community Solar gardens support.

## Illinois

- Ensure Adjustable Block Program implementation around vendor requirements, consumer protection, standard contracts, marketing materials, etc.
- Drive program improvements in the 2019 renewable procurement plan and push for interconnection reform.
- Develop and advocate for proposals for post-NEM compensation structures that continue to drive market development.
- Ensure successful implementation of the Solar For All program, including workforce development component.
- Monitor and steer University of Illinois researchers' work on PV recycling toward information gathering and level setting, and away from mandatory action.
- Support developers on land use issues.
- Find resources to hire a lobbyist; expected legislation includes 100% clean energy bill, a nuclear bailout funding proposal from Exelon, Vistra coal bailout proposal, rate design and other proposals from ComEd, and improvements to and extension of RPS.

## South Carolina

Comprehensive energy reform and implementation, including new utility-scale programs and meaningful rate design change for distributed generation.

## Michigan

- Potential intervention in DTE IRP, with co-funding.
- Potential intervention in Interconnection reform docket, with co-funding.
- Likely participation in various PURPA-related dockets, in collaboration with ELPC and Vote Solar.
- Potential for SEIA to engage lobbyist, with co-funding. Expected legislation includes community solar bill, NEM restoration, and property tax bill for utility-scale projects.

## Massachusetts

- Ensure the SMART program rolls out well and fix lingering issues with its implementation during the regulatory review.
- Block bad utility minimum monthly reliability contribution proposals in upcoming utility regulatory proceedings.

## New York

- Preserve net metering - in some form - for residential/small commercial customers in New York.
- Finalize fixes to New York's VDER tariff for larger-scale solar projects.
- Develop a better roadmap for meeting Clean Energy Standard targets in the out-years.
- Support legislation codifying a long-term solar goal and extending NY Sun.

## New Jersey

- Establish interim successor incentive program to the current SREC program and set up the path to a long-term incentive program, via legislation developed and driven by SEIA, with support from a collection of local and regional solar advocates.
- Help expand the size of the community solar pilot & relax some of the land use restrictions on large-scale solar.

## Southeast States

- Increase engagement in emerging markets; specifically, empower TenneSEIA's role as an advocate in the Tennessee Valley to create increased solar procurement for commercial and industrial energy users.
- Robust regulatory engagement with partners in North and South Carolina on avoided cost, integrated resource planning and rate design, and continued support of partners in Virginia (legislation to advance distributed generation, provide guidance to the State Corporation Commission on approval of utility-scale renewables).

## Florida

Advance competition in Florida solar market through regulatory proceeding.



## Federal Policy

### 2018 Policy Victories

SEIA achieved an important policy success in 2018 by tempering the Section 201 tariffs on imported cells and modules. Without SEIA's leadership, the industry could have faced import tariffs as high as 32 cents per watt, which would have resulted in the loss of more than 5 GW of annual installations, tens of thousands of jobs, and **between \$5 billion and \$8 billion in investments.**

Having preserved the Investment Tax Credit (ITC) through tax reform, SEIA also secured favorable commence construction guidance from the Treasury Department, giving investors and project developers the certainty they need to move forward with new solar projects. We visited Members of Congress who represent the top 100 solar districts and strengthened relationships through five region-specific lobby days. This education campaign has laid the groundwork for stronger congressional support next year.

In collaboration with other stakeholders, we secured a favorable interpretation of the Migratory Bird Treaty Act by the Department of the Interior, continued as the leading defender of PURPA and deepened our engagement at FERC and at RTOs. SEIA, along with energy industry partners, successfully opposed DOE's plan to bail out uneconomic coal and nuclear power plants. Removing these obstacles will create a clear pathway for solar development for decades.

### 2019 Plans

All of SEIA's federal efforts in 2019 will focus on both short- and long-term opportunities with potentially massive implications for the industry. In general, our federal lobbying spending is balanced evenly between tax policy and spending on energy-related issues, with trade falling in a separate bucket.

In Congress, 2019 offers opportunities to capitalize on infrastructure legislation, which has implications for energy and tax. Democratic takeover of the House also means more serious talk about carbon policy, as well as a potential opening for an extension of the ITC for solar. Additionally, the Senate Finance Committee and the House Ways and Means Committee are the venues for any discussion regarding tax policy. SEIA will continue to be an active player in those conversations.

We also will seek funding for automated permitting, among our other congressional initiatives. Next year will be a busy year on both tax and energy policy fronts. Our priorities include:

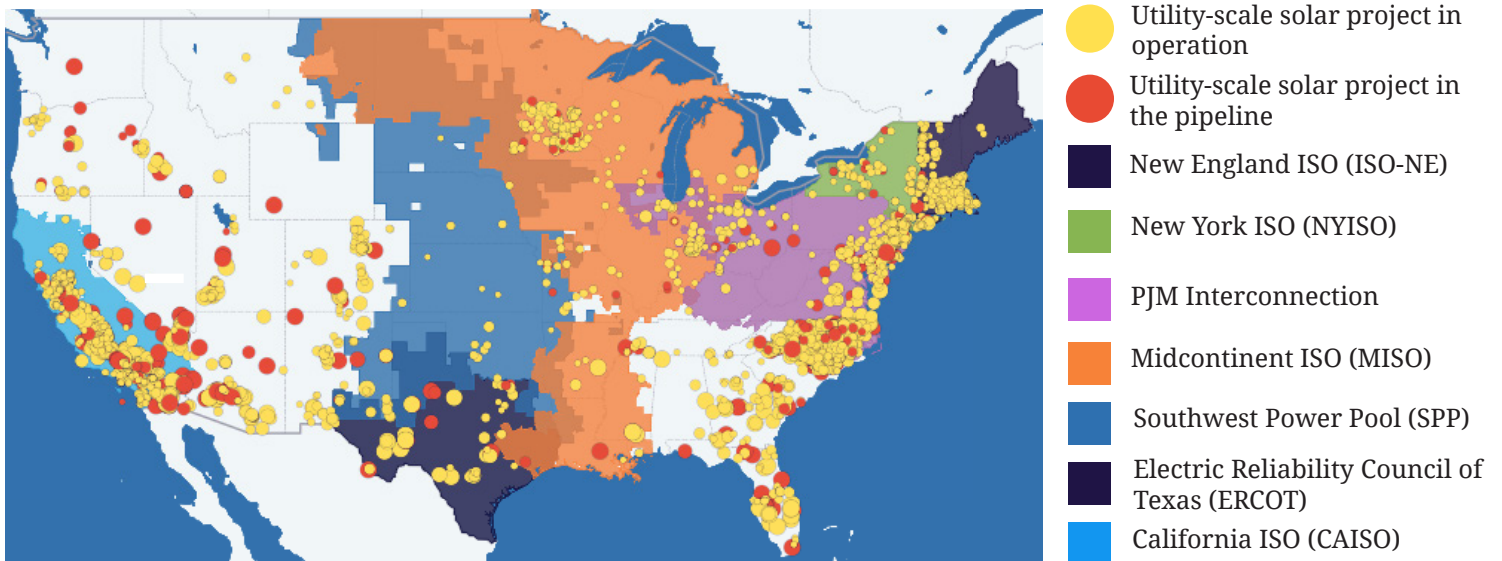
- Pass legislation to apply ITC to storage;
- Secure pro-solar provisions in infrastructure legislation;
- Obtain appropriations for Solar APP;
- Engage in meaningful dialogue and discussion around carbon policy;
- Conduct outreach with the offices of all new members of Congress and work to build relationships with new committee members as well as cultivate new, bipartisan solar champions;
- Develop relationships with key caucuses in Congress;
- Expand the Federal Affairs team;
- Fund research to support tax policy. Whether ITC-related or carbon-related, a study of investment and deployment projections will inform our decisions and support our ask;
- Secure outside counsel for Siting & Permitting work, as we expect a rulemaking from the Department of the Interior on migratory bird regulations.

Without this work, we risk losing existing tax incentives and billions of dollars in potential opportunities.

On the regulatory front, we will create a new manager-level position to focus on increased regulatory engagement, supporting SEIA’s efforts at FERC and on PURPA. We will continue to push for appropriate rental fees for solar developers’ use of BLM-managed land and monitor an expected rulemaking from the Department of the Interior that addresses migratory birds.

SEIA is funding an RTO initiative to ensure pro-solar outcomes in transmission planning and building and favorable interconnection policies. We also will collaborate with AWEA where possible to stretch our resources. **Failure to engage in RTOs will mean that incumbent interests continue to write the rules that govern access to and compensation in wholesale electricity markets.**

### Solar Deployment & RTO/ISO Service Territories



## Communications, External Affairs & Research

SEIA is committed to serving as the voice and research arm of the solar industry and the two go hand-in-hand. People look to SEIA as a credible source of information about solar industry markets and data, and this helps us build trust with the press and the public.

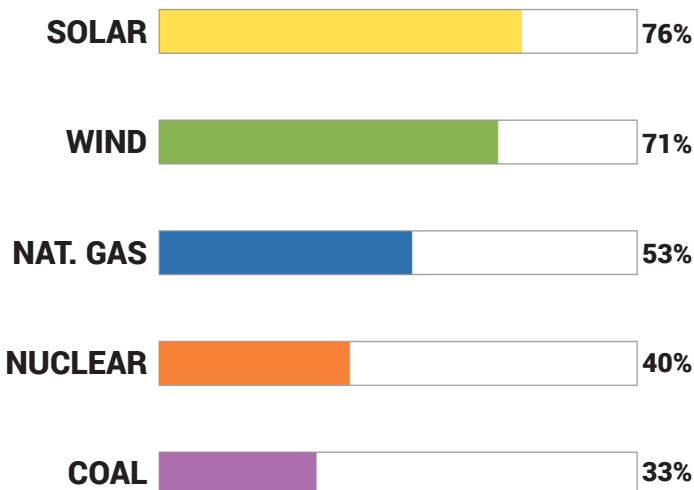
In addition, we have placed significant emphasis on messaging and communications, commissioning research on public opinions about solar and about messages that are effective with different audiences. Our goal is to leverage our resources to build relationships that will help us spread our messages broadly to target audiences.

We have generated 18,428 media hits through mid-November with a value to SEIA based on advertisement equivalencies of \$21.5 million. Just for comparison sake, the American Wind Energy Association has earned 7,325 mentions worth \$6.5 million, and the mighty Edison Electric Institute, with a communications budget in the tens of millions of dollars, has earned 13,526 hits valued at \$9.4 million.

On the Research side, our Solar Market Insight report continues to draw national media attention and create revenue. We gross more than \$300,000 a year for the SMI reports and get several million dollars in ad equivalency value from the news coverage. Our Solar Means Business report highlights the growing investments of corporate leaders, and our tailored research work (e.g. providing trade statistics) has helped us tell our story in a more compelling way.

### Key Takeaways from 2018 SEIA Solar Messaging Survey

My electric utility should get more of its power from:



Messages that resonated with poll respondents:

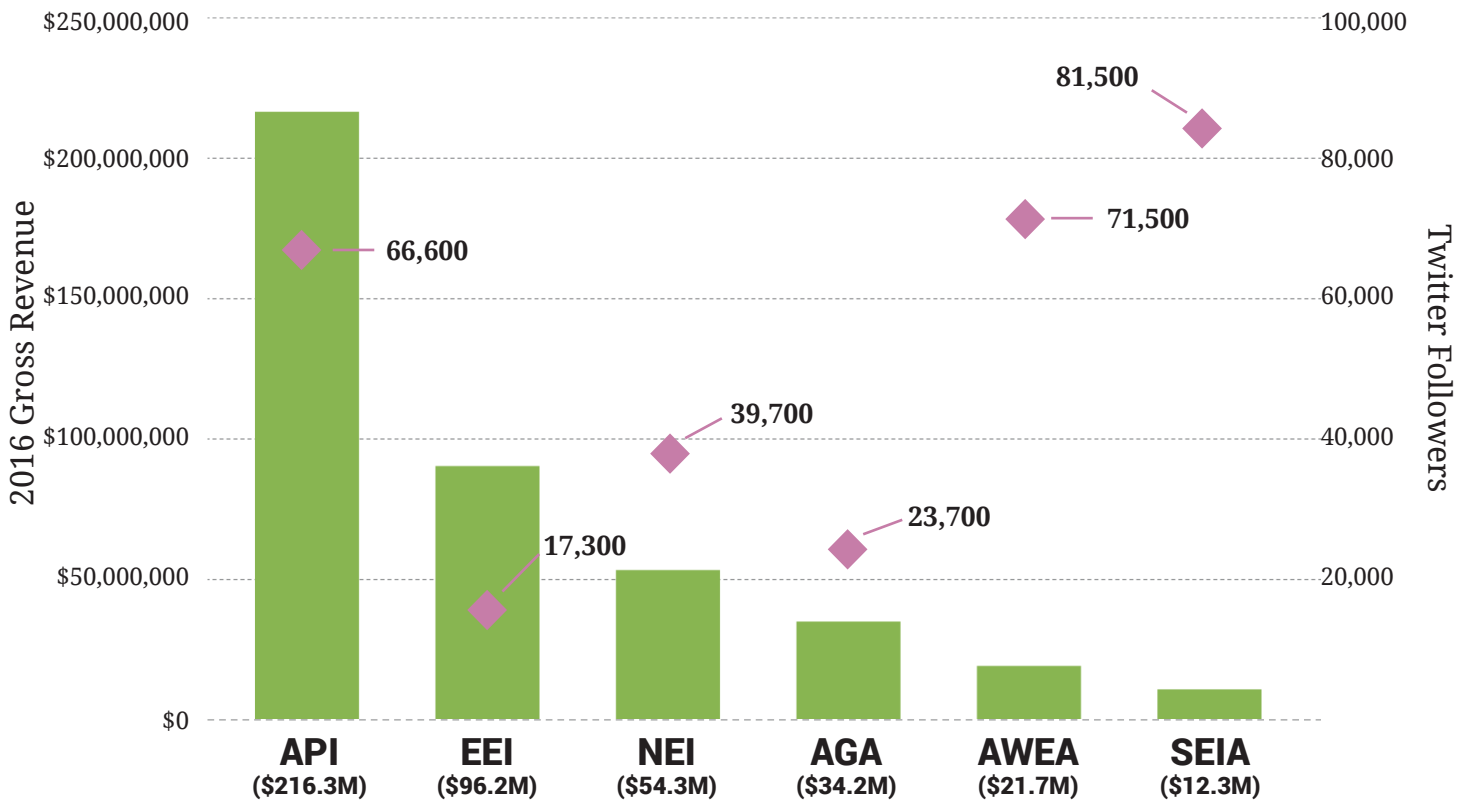
**“the solar industry has added more than 150,000 jobs in the past six years”**

**“clean energy will sharply reduce the carbon, sulfur, and mercury pollution that come from burning fossil fuels”**

**“the price of solar power has dropped by 80% in the past decade”**

**“solar power will continue to work as long as the sun shines, creating zero pollutants and a near-infinite amount of energy”**

### Competitor Comparison - Energy Association Revenue vs. Twitter Followers



#### The Financial Value of SEIA’s Communications Activities

Total Ad Equivalency of YTD2018 SEIA Media Mentions: **\$21.5 Million**

Total Ad Equivalency of YTD2018 SEIA Website Organic Search Visits: **\$318,522**

Market Value of Twitter Followers, SPAN & SEIA Newsletter Subscribers: **\$330,000**

Market Value of SEIA Social Media Engagements: **\$103,000**

#### The Financial Value of SEIA’s External Affairs Work

- Affiliate/partner relationships save SEIA \$50,000+ in each market due to reduced staffing/consultant needs. A conservative estimate places this value at a minimum of \$350,000.
- The value of the programming from our Women’s Empowerment events is approximately \$250,000.

## 2019 Communications Plans

Next year, we will continue to provide members with first class communications and research services. Our public relations firm has substantially increased the number and quality of our media hits, both drafting content and pitching the media. We also will expand funding for partnerships and sponsorships intended to activate third party voices on our behalf, and we will work with solar industry allies to amplify our messages. Finally, highlighting our consumer protection efforts, which touches on a number of our departments, will be a priority for the communications team. We believe our public affairs work has an annual value of roughly \$30 million and is tightly linked with policy work supporting the value that they bring. On external affairs, the goal is to expand engagement with groups such as the National Governors Association, National Association of Blacks in Energy and the U.S. Hispanic Chamber of Commerce and others. We also will ramp up an op-ed campaign and increase targeted advertising.

SEIA plans to use communications and research to build good will and provide air cover to policymakers who want to support our cause. Additional engagement from third parties can help position SEIA as a thought leader and bring significant credibility to the solar industry. We'd like to see an additional \$1 million in quantifiable benefits for this engagement.

## 2019 Research Plans

We will continue to provide high-level research services to the industry, including the Solar Market Insight and Solar Means Business reports, and other more time-sensitive research to support industry initiatives. With approval of the 2019 proposal, we would continue to offer the SMI report to Terawatt members at no extra cost, and we would hire a junior staff member to manage the National Solar Database. The department will continue to serve both federal and state affairs by providing routine factsheet updates and analytical support. In 2019, we will work with a third-party market research firm specifically for ITC extension research, do more to promote our studies to third-party audiences and begin to undertake research for a midterm review of the trade case, which also will inform media outreach efforts.

## Business Development

SEIA has a strong commitment to business development. With a new Vice President of Business Development on hand, we are undertaking several initiatives that we anticipate will generate more revenue. We believe we can create a virtuous cycle in which we offer more services as described above to our members, creating more opportunities to promote and sell membership. As SEIA prepares for 2019, the membership team plans three areas of emphasis:

- We will interact on a more frequent basis with potential Terawatt members, with more structured scheduling and tapping the strong closing skills of CEO Abby Hopper.
- SEIA is adjusting internal structure and incentives for membership staff to align motivation toward retention. By taking a regional approach, SEIA's membership team will gain deeper understanding of members' interests and deliver increasingly relevant benefits.
- We are taking a new approach to recruiting solar and storage companies. In September, SEIA launched new Basic and Watt membership levels to democratize SEIA's representation. This widening of our base and voice is important when we seek to persuade policymakers.

Our Business Development work can generate \$3 million in additional revenue in the next 2 years. We also are considering affinity programs, expanded affiliations with state chapters and certifications that can generate conservatively \$2 million in member benefits.

## Conclusion

This document should serve to put into perspective the amount of money we are asking for to support your trade association against the backdrop of billions of dollars in opportunity and risk that lies out in the market. We don't claim to deserve sole credit for creating these opportunities or staving off the risks, and we won't win every battle. But at a time in our industry when so much must be accomplished, it is essential to support a strong national trade association. The investments we make collectively through the work outlined in this report will be worth billions of dollars in the long run.



# About SEIA

The Solar Energy Industries Association (SEIA®) is the driving force behind solar energy and is building a strong solar industry to power America through advocacy and education. As the national trade association of the U.S. solar energy industry, which now employs more than 260,000 Americans, we represent all organizations that promote, manufacture, install and support the development of solar energy. SEIA works with its 1,000 member companies to build jobs and diversity, champion the use of cost-competitive solar in America, remove market barriers and educate the public on the benefits of solar energy.

[www.seia.org](http://www.seia.org)