

ICMA Solar Survey of Local Governments 2011

The Solar Survey was conducted in the fall of 2011 and closed in January 2012. Surveys were mailed to all 10,423 city-type and county governments with a population 2,500 and above. An online option was also available. The survey response rate is 24%, with 2,507 local governments responding.

The summary below shows the percentages that provided answers in response to each individual question. **Not all local governments answered each question, so the percentages are not based on all survey respondents. The number reporting (N) is provided for each question.**

BACKGROUND

Which of the following has your local government adopted or established?

A renewable energy goal (N=239)	10%
A solar installation goal (N=117)	5%
None of the above (N=2,040)	87%

If your local government has any of these positions, please indicate whether staff or a consultant fills the position.

	Local government staff position	Use consultant for this position
a. A solar energy coordinator/manager (154 reporting)	45% (N=69)	58% (N=90)
b. A renewable energy coordinator (153 reporting)	54% (N=82)	50% (N=67)
c. A sustainability coordinator (295 reporting)	77% (N=226)	25% (N=74)
d. Other position that works on solar/sustainability projects (698 reporting)	87% (N=606)	45% (N=313)
e. None of these positions (1,243 report none)		

If any of the positions are local government staff, how many FTEs are dedicated to sustainability or solar energy? Average = 2

Has your local government faced any challenges to solar energy development?

- Yes = 32% (N=736)
- No = 68% (N=1,552)

If you answered "yes," which of these challenges to solar energy development has your local government faced? (Check all that apply.)

Challenge	% Reporting	Challenge	% Reporting
Aesthetic impact concerns (N=210)	29%	Lack of interest in or awareness about solar energy development (N=198)	27%
Impact on property values (N=62)	9%	Lack of qualified installers (N=48)	7%
Trouble working with local utilities to interconnect systems to the grid (N=113)	16%	Safety concerns (N=39)	5%
Lack of understanding of technology (N=187)	26%	Lack of enabling legislation to incentivize solar installations (N=194)	27%
Lack of coordination between levels/agencies of government (N=92)	13%	Lack of enabling legislation to regulate solar installations (N=51)	7%
High solar costs (N=468)	64%	Other (N=148)	20%

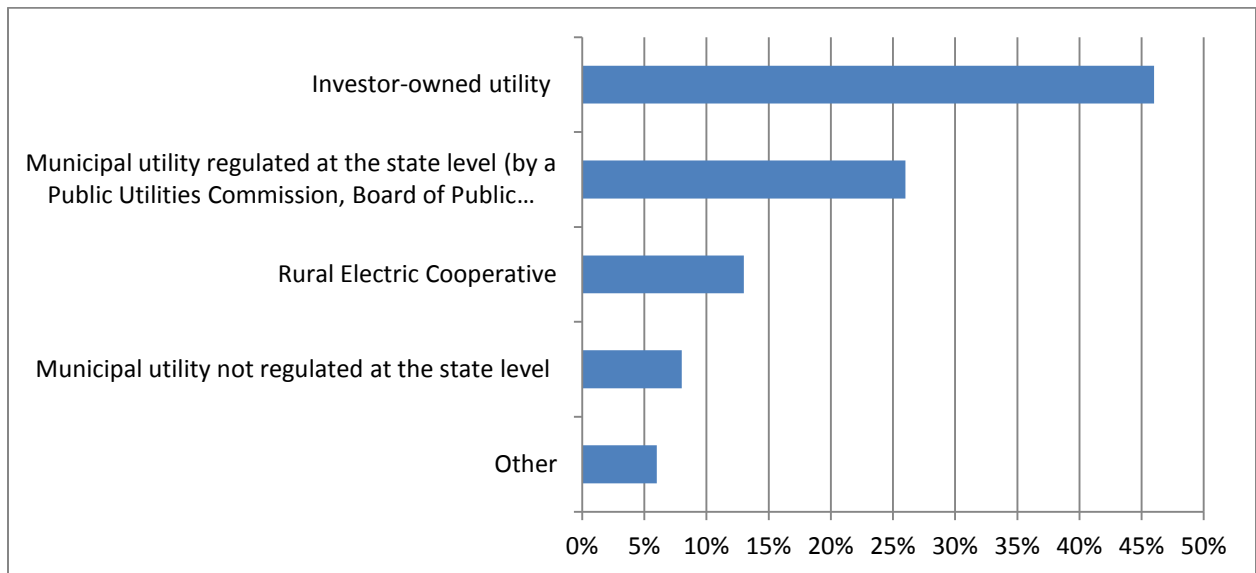
Does your local government offer any community outreach and education programs on solar energy?

- Yes = 12% (N=289)
- No = 84% (N=2,041)
- Don't know = 5% (N=113)

If you answered "yes," which of the following community outreach and education programs does your local government offer on solar energy? (Check all that apply.)

Program	% Offering	Program	% Offering
Workshops (N=113)	40%	Informational website (N=129)	45%
Awareness campaigns (N=97)	34%	Staff available to assist customers (N=123)	43%
Educational brochures (N=113)	40%	Other (N=79)	28%

What type of electric utility is the primary provider of electricity in your jurisdiction? (N=2,317)



Local governments were instructed that if they are not currently doing anything with solar energy they should stop here, complete the contact information section at the end of the survey if they would like to be contacted, and return the survey. If they have a solar program, have municipal solar installations, or are looking into a solar program, they should continue with the survey.

If your electric utility is a municipal utility, are you aware if your utility has established interconnection standards for solar PV systems? (N=271)

- Yes = 49% (N=134)
- No = 15% (N=41)
- Don't know = 35% (N=96)

Does your primary utility have a net metering policy (a billing mechanism that credits solar energy system owners for the electricity exported to the grid) for solar PV installations? (N=751)

- Yes = 64% (N=483)
- No = 11% (N=84)
- Don't know = 25% (N=184)

INSTALLED CAPACITY

Has your local government installed a solar system on local government-owned facilities or land? (N=848)

Yes = 48% (N=404)

No = 52% (N=444)

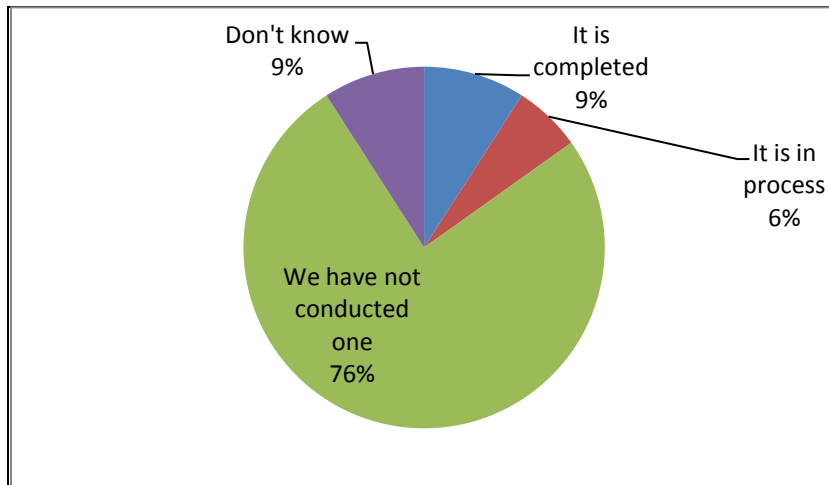
Which of the following has been installed on a local government-owned building? (N=388)

Type of solar system	% reporting
Solar electric (PV) panels on a local government facility or facilities (N=329)	85%
Solar water heating on a local government facility (N=95)	25%
Solar air collectors on a local government facility (N=8)	2%
Other (N=42)	11%

For solar systems on local government facilities or land:

	Yes (%)	No (%)
Do you own the system? (N=194)	61% (N=118)	39% (N=76)
Do you buy the power? (N=159)	33% (N=53)	67% (N=106)
Do you lease the roof space or land on which the system is located? (N=158)	11% (N=18)	89% (N=140)

Which best describes your local government's baseline survey of all community-wide solar PV installations? (N=720)



Has your local government installed one or more solar PV demonstration projects (a project intended as a public showcase and educational opportunity)? (N=792)

- Yes = 31% (N=242)
- No = 69% (N=550)

Where is the demonstration project located? (N=226)

A government facility (N=160)	71%
A community facility (e.g. a recreational center or public library) (N=69)	31%
A school (N=37)	16%
Other (N=22)	10%

PERMITTING AND INTERCONNECTION PROCESSES

Do you have any mechanisms for expediting permitting for solar PV installations (e.g., expedited review for standard installations, expedited review for qualified contractors, and expedited review for customers willing to pay an extra fee)? (N=799)

- Yes = 13% (N=103)
- No = 87% (N=696)

Does your local government make information about the permitting process for solar PV installations and associated fees available online? (N=798)

- Yes = 29% (N=232)
- No = 61% (N=484)
- Don't know = 10% (N=82)

Please indicate the ways to submit permits for solar PV projects. (N=592)

Method of submission	% reporting
Online permitting (N=75)	13%
Email submission (N=71)	12%
Submission by mail (N=195)	33%
Over-the-counter permitting (N=549)	7%
Other (N=39)	7%

Have your code officials gone through training on approving permits and inspecting solar PV installations? (N=786)

- Yes = 35% (N=271)
- No = 27% (N=213)
- No, but are interested = 14% (N=110)
- Don't know = 24% (N=192)

Has your local government adopted the 2011 National Electric Code? (N=777)

- Yes = 25% (N=194)
- No = 57% (N=440)
- Don't know = 18% (N=143)
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Is information about your local utility's interconnection process for solar PV installations and associated fees available online? (N=792)

- Yes = 21% (N=162)
- No = 49% (N=386)
- Don't know = 31% (N=244)

PLANNING PROCESS

Which of the following plans and regulatory documents your local government has adopted and which address solar energy? (N=325)

Type of Plan or Regulation	Local government has adopted	Addresses solar energy
Comprehensive Plan	72% (N=465)	35% (N=113)
Area Plan	19% (N=125)	5% (N=15)
Climate Plan	16% (N=100)	20% (N=66)
Energy Plan	20% (N=128)	26% (N=85)
Sustainability Plan	23% (N=149)	27% (N=87)
Capital Improvements Plan	59% (N=379)	15% (N=48)
Zoning Ordinance	78% (N=504)	43% (N=140)
Subdivision Regulations	62% (N=399)	15% (N=47)
Green Building Code	26% (N=165)	28% (N=90)

Has your local government addressed solar energy through the planning process in ways other than those listed above? (N=803)

- Yes = 17% (N=139)
- No = 71% (N=570)
- Don't know = 12% (N=94)

How else has your local government addressed solar energy? (N=137)

Solar energy discussed in visioning process (N=74)	54%
Solar access ordinance has been adopted/pending (N=17)	12%
Solar energy system ordinance (an ordinance that defines where and under what conditions a PV system can be installed) has been adopted/pending (N=37)	27%
Process in place for establishing solar easements (N=5)	4%
Requires new homes to be built solar-ready (N=8)	6%
Developed a solar-energy potential map (N=17)	12%
Requires solar-oriented lots (N=5)	4%
Other (N=28)	20%

Has your local government coordinated with neighboring local governments on solar initiatives? (N=820)

- Yes = 18% (N=149)
- No = 78% (N=639)
- Don't know = 4% (N=32)

On which of the following have you coordinated with neighboring local governments? (N=135)

Negotiations with utilities regarding renewable/solar energy (N=31)	23%
Joint power purchase agreements (N=35)	26%
Joint purchasing of solar technologies (N=23)	17%
Incentives for solar installations (N=42)	31%
Large-scale solar power installations (N=23)	17%
Streamlining permitting processes across jurisdictions (N=48)	36%
Model ordinances for alternative/solar energy (N=28)	21%

Have private restrictive covenants within homeowners' associations impacted local regulation of solar energy in your local government? (N=794)

- Yes = 7% (N=52)
- No = 50% (N=397)
- Don't know = 44% (N=345)

Does your local government regulate solar PV installations? (N=812)

- Yes = 42% (N=339)
- No = 46% (N=371)
- Don't know = 13% (N=102)

If your local government regulates solar PV installations, how are they regulated in your local government?

	Small Rooftop Less Than or Approximately 15KW	Large Rooftop Less Than or Approximately 15KW	Small Ground- mounted Less Than or Approximately 15KW	Large Ground- mounted Less Than or Approximately 15KW
Permitted as a primary use (N=127)	85% (N=108)	76% (N=96)	61% (N=77)	65% (N=82)
Permitted as an accessory use (N=214)	88% (N=189)	79% (N=170)	85% (N=182)	74% (N=159)
Permitted as a conditional or special use (N=93)	56% (N=52)	52% (N=48)	61% (N=57)	73% (N=68)
Restricted from certain districts (N=43)	47% (N=20)	51% (N=22)	72% (N=31)	91% (N=39)
Restricted from certain view sheds (N=32)	78% (N=25)	78% (N=25)	63% (N=20)	66% (N=21)
Restricted from historic districts or buildings (N=38)	87% (N=33)	82% (N=31)	82% (N=31)	82% (N=31)
Regulations related to setbacks (N=189)	69% (N=130)	62% (N=117)	93% (N=175)	91% (N=171)
Regulations related to lot/building coverage (N=101)	72% (N=73)	67% (N=68)	89% (N=90)	88% (N=89)
Subject to height limits (N=179)	90% (N=161)	82% (N=147)	87% (N=155)	83% (N=148)
Subject to height exemptions (N=51)	90% (N=48)	84% (N=43)	59% (N=30)	63% (N=32)
Includes maintenance provisions (e.g., maintained in good repair) (N=72)	86% (N=62)	76% (N=55)	88% (N=63)	89% (N=64)
Includes safety provisions (e.g., wind resistance) (N=130)	93% (N=121)	86% (N=112)	85% (N=110)	86% (N=112)
Other provisions (N=36)	78% (N=28)	67% (N=24)	81% (N=29)	78% (N=28)

FINANCING OPTIONS

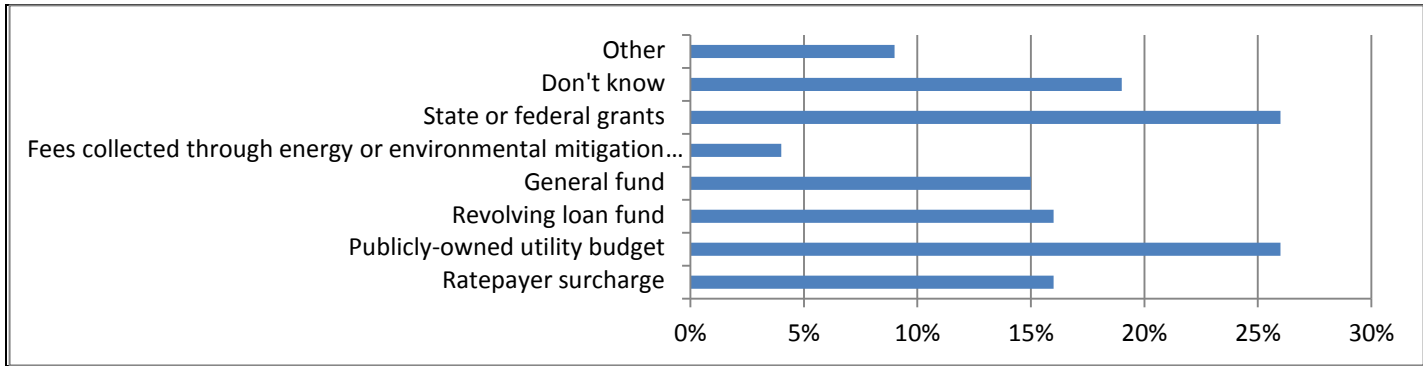
Does your local government or municipal utility offer financial incentives for installing solar PV? (N=836)

- Yes = 17% (N=144)
- No = 77% (N=643)
- Don't know = 6% (N=49)

If your local government or municipal utility offers financial incentives, which of the following incentives does your local government or municipal utility offer for installing solar PV?

	Residential (n=122)	Commercial (n=101)
Rebates	61% (N=74)	63% (N=64)
Direct Grants	11% (N=13)	12% (N=12)
Direct loans/low-interest loans	23% (N=28)	21% (N=21)
Feed-in tariffs (FIT)	7% (N=8)	12% (N=12)
Production-based incentives (other than FIT)	9% (N=11)	15% (N=15)
Interest rate buy-downs	3% (N=3)	2% (N=2)
Property tax abatement	5% (N=6)	4% (N=4)
Property tax credit	7% (N=8)	5% (N=5)
Sales tax incentives	4% (N=5)	4% (N=4)
Other	22% (N=27)	21% (N=21)

How are direct incentives funded? (n= 101)



Are there any customer aggregation programs (programs that coordinate group purchases of solar energy systems) for solar PV installations in your community? (N=752)

- Yes = 8% (N=60)
- No =65% (N=489)
- Don't know = 27% (N=203)

Is third-party financing for solar PV systems (e.g., power purchase agreements, leases) available in your area? (N=761)

- Yes = 35% (N=269)
- No =23% (N=176)
- Don't know = 42% (N=316)

If third-party financing is available, which of the following third-party financing options are available?

	Residential	Commercial
Power Purchase Agreement (n=220)	54% (N=119)	94% (N=207)
Leasing (n=180)	68% (N=123)	91% (N=164)

Has your local government considered property assessed clean energy (PACE) financing? (N=773)

- Yes = 21% (N=165)
- No, my jurisdiction has not considered PACE financing = 47% (N=363)
- I don't know what PACE financing is = 32% (N=245)

If your local government has considered PACE financing, which of the following best describes the status of PACE financing? (n=125)

Active residential program	14% (N=18)
Residential program on hold	60% (N=75)
Active commercial program	14% (N=17)
Commercial program on hold	29% (N=36)
Other	23% (N=29)

Do you have an active community solar program for solar PV installations, defined as a solar-electric system that, through a voluntary program, provides power and/or financial benefit to or is owned by multiple community members? (N=754)

- Yes = 2% (N=11)
- No = 94% (N=709)
- In Progress = 5% (N=34)

Does your local government provide incentives for clean energy businesses to locate in the area?

- Yes = 11% (N=86)
- No = 81% (N=620)
- Don't Know = 7% (N=56)