

Pivotal Leaders Network Formative Evaluation September 2010



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Pivotal Leaders Network

Formative Evaluation

Final Report

Prepared for:

Pivotal Leaders Network

Prepared by:

Economic Development Administration
University Center

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INTRODUCTION

The Pivotal Leaders network is designed to expand resources for innovation in the clean technology sector in the Northwest by providing opportunities to learn, collaborate and develop connections across the Northwest and around the world. The Pivotal Leaders network focuses on Oregon, Washington, Idaho and British Columbia. By helping to identify and recognize outstanding prospective CEO and CTO talent in the region, it provides opportunities for leaders to partner, collaborate and maximize their chances of success.

The group's mission is to demonstrate that the Northwest has a wealth of talented business leaders who are participating or want to participate in building vibrant companies here targeting more productive use of resources. Members of the Pivotal Leaders network have been recognized by their peers as persons who have the knowledge, skills, motivation and business acumen to lead successful clean technology companies in the Northwest in the next 5 years.

The Pivotal Leaders Network engaged the University of Oregon's Economic Development Center to conduct a formative evaluation of the Network. The mission of the University of Oregon (UO) Economic Development Center is to link UO resources with communities and organizations for the purpose of enhancing regional sustainable economic development. The focus of this program is creating sustainable local economies through capacity building, applied research, and partnerships. The program is a partnership between the U.S. Department of Commerce, Economic Development Administration (EDA), the University of Oregon, state and local government, and private industry.

Purpose and Methods

To complete the formative evaluation EDA created an online survey to distribute to the 32 members of the Pivotal Leaders Network. The findings from the survey will be used by the Pivotal Leaders' steering committee to better understand the leaders themselves and provide guidance on ways they can provide value to members of the Pivotal Leaders Network. The following outlines the three primary goals of the survey:

1. Understand how the Pivotal Leaders sponsors and steering committee can bring value to members of the 2010 Pivotal Leaders Network.
2. Gather information about individuals to align expectations and understand how best to engage in network activities.
3. Create a snap shot of the Network, which can be used to communicate its value to the region and track progress over time.

The survey contained 19 questions of both closed and open-ended formats. It was organized into three sections: 1) Member Information, 2) Defining the Network, and 3) Participation in the Network. The questions related to the respondents' current role in the clean technology sector, how they see their role changing over time, and what role the Pivotal Leaders network can play in moving the Northwest into a national and

world leader in clean technology. The survey was administrated in August of 2010 using the online software Qualtrics. Members were contacted via email with a request to complete the survey and follow-up requests were made as needed. Thirty-one out of the 32 members were able to complete the survey.

SURVEY FINDINGS

The following sections summarize the responses from the survey. Please note that many of the questions in the survey allowed the respondent to offer open-ended comments. To analyze this data EDA took this open-ended question and grouped responses into similar categories to see how often a particular response was given. EDA then counted the number of times a response was given and put all responses into a high, medium, and low frequency distribution for comparison. The tables for these questions list the comment, the number of times it was said, and the frequency category it falls into. A list of verbatim responses can be found in Appendix A of this report. In addition, frequency tables with corresponding responses are also available in Appendix B.

The remainder of the report is broken into two primary sections: 1) survey respondent characteristics and 2) specifics of how key strategies will aid in the success and influence of the Pivotal Leaders network.

Respondent Characteristics

The survey had a total of 31 respondents representing 25 different zip codes and 26 identified companies in the Pacific Northwest.

Industry Sectors

Respondents represented a wide variety of clean technology sectors. Listed below are noticeable trends amongst survey respondents. For a complete list of sectors represented, refer to Appendix A.

- Work in the field of clean, efficient, or renewable energy account for 14 of the 31 respondents. Of these 14 respondents:
 - 5 focus on renewables
 - 3 focus on clean energy
 - 2 work primarily with energy storage, and 1 person noted working with solar power.
- 3 respondents focus on transportation.
 - 1 of these specifically stated working with electrification of the transportation grid.
- 3 respondents focus on sustainable land use or real estate development.
- 2 respondents focus on clean and or sustainable technologies.

Organization Information

Question: To help us track the success of the Network over time, please provide the following information about your organization.

Twenty-seven respondents answered this question. Currently, the Pivotal Leaders Network is composed of just over 95,000 employees. Company sizes range from 1.6 FTE to a company with 90,000 employees. Fourteen of these member companies employ 10 or less people. Combined annual revenue for these 27 companies is approximately \$44 billion dollars. Annual revenue ranges from small up and coming companies with no net revenue to the largest company that reported annual revenue of \$40 billion dollars. Seventeen of the 27 companies reported revenue of \$500,000 or greater for the past year.

Pivotal Leaders appear to be faring well in the recession. Of the 27 companies who responded, only two companies recorded a negative growth rate over the past three years; and one of these companies is a state funded agency. The highest growth rate was 300% for a company that brings in \$1-2 million in annual revenue. Seven companies reported a 20% or greater growth rate over the past three years. In terms of anticipated growth, one third of the respondents anticipate a growth rate of 50% or greater over the next three years. While some companies anticipated leveling off, no companies anticipated negative growth.

Role in Clean Technology Industry

Question: Which of the following best characterizes your role in the clean technology industry?

As summarized in Table 1, members of the Pivotal Leaders network represent a wide variety of positions within their respective companies. It is interesting to note that almost half of those surveyed are entrepreneurs. Those who responded as ‘other’ included a business owner, an executive investor, a company builder, and one individual involved in research, consulting, and publishing.

Table 1. Role in clean technology industry

Role in clean technology industry	Percent
Clean tech entrepreneur	40%
Prospective clean tech entrepreneur	0%
Corporate executive	27%
Public/Non-profit leader	17%
Service provider	3%
Other	13%
Total Respondents	30

(Source: 2010 Pivotal Leaders Survey)

Future Role in Clean Technology Industry

Question: As you compare your current involvement in the clean technology industry today, where do you aspire to be three years from now?

Table 2 is a frequency table highlighting open ended responses that appeared at high, low, and medium frequencies by survey respondents. Respondents’ answers to this question aligned with a general theme of striving to improve the efficiency of green technology. Respondents differed on how to best accomplish this task, citing

innovation, increasing availability, increased profitability, and better policy as potential ways to improve the efficiency of clean technologies.

In terms of high frequency responses, advancing the clean technology industry through innovation, making technologies more available to everyone, and specifying goals to increase environmental awareness represented 28 responses. Specific ideas for ways to implement innovation included technology development and deployment, geographical expansion, better software, and project finance. Environmental markets for water at scale and better energy efficiency for solar and wind power were specific ideas listed for increasing environmental efficiency.

Ideas such as increasing profitability in the private sector, starting a clean technology business, and operating an existing company at net zero represented 11 responses (the medium frequency category). Responses that fit in the category, ‘increase profitability in the private sector’ included a desire to build better management teams, specific profitability goals, as well as a desire to expand high growth and go-to market strategies.

The final category in Table 2 is strategies suggested by only 1 respondent (the low frequency category). The respondent who envisioned ‘passing clean energy legislation’ specified a focus on Oregon while also setting a national standard. The survey participant categorized as ‘undefined’ specified a desire to “be creating impact (financially, socially, environmentally) in whatever I am doing 3 years from now.”

Table 2. Future role in clean technology industry

Response	Frequency	
Leading/advancing clean technology industry through innovation	high	10
Make technologies more available to everyone	high	10
Specific goals to increase environmental efficiency of current company	high	8
Increasing profitability in private sector	medium	5
Start a clean technology business	medium	4
Operating net zero	medium	2
Passing clean technology legislation	low	1
Undefined: make some type of an environmental, social, or economic impact	low	1
Fundamentally change the way large businesses do business	low	1

(Source: 2010 Pivotal Leaders Survey)

Note: some respondents provided multiple answers for this question

PIVOTAL LEADER NETWORK STRATEGIES

Strategies for Added Value

Question: What are three things that the Pivotal Leaders Network can do to bring value to your efforts to advance your business?

Table 3 is a frequency table highlighting open-ended responses that appeared at high, medium, and low frequencies by survey respondents.

In terms of high frequency responses, a desire for access to networking opportunities with other regional clean technology leaders far exceeded any other suggestion. Specifically, those who wanted networking opportunities suggested creation of regional connections to myriad aspects of a clean technology cluster and helping to increase opportunities for economic growth and market expansion. A number of respondents cited the potential for sharing of specializations as a key reason behind networking as well. Along the same lines as networking, a significant portion of respondents desired that the network serve as a means of collecting and disseminating information and research on clean energy related topics. As shown in Table 3, respondents also cited policy influence and visibility in the community as significant potential for added value from the network.

Ideas such as expertise sharing with pivotal leaders, facilitation of financial opportunities, visibility in the community, and policy influence were suggested with medium frequency. Examples provided for expertise sharing within the community of leaders included skills such as fundraising, legal services, and operations. Policy influence includes increased awareness for clean technology in the legislature, educating regulators and representatives, as well as advocating for regulations that support clean technology.

Strategies such as one unified voice, access to capital, and outreach to other companies, educators, and universities were suggested with low frequency. Respondents who suggested one unified voice described a group with a voice that is recognizable and appreciated, with true leaders and a specific business agenda.

Table 3. Strategies for added value

Response	Frequency	
Networking with fellow leaders	high	18
Clean tech think tank	high	13
Expertise sharing within pivotal leaders	medium	6
Facilitate financial opportunities	medium	6
Provide visibility within the community	medium	6
Influence policy	medium	4
One unified voice	low	3
Access to capital	low	2
Extend network to other companies	low	2
Educate investors	low	2
Outreach to universities	low	2

(Source: 2010 Pivotal Leaders Survey)

Note: some respondents provided multiple answers for this question

Top Priorities for the Clean Technology Industry

Question: What should the region's top three priorities be relative to the economic opportunity for clean technology?

Table 4 is a frequency table highlighting open-ended responses that appeared at high, medium, and low frequencies by survey respondents.

In terms of high frequency responses, policy change far exceeded any other suggestion as a key priority for increasing the economic opportunities associated with clean technology sector. Specifically, respondents who desired policy change cited the need for a carbon tax, tax incentives for green technology deployment, regulatory streamlining, and feed-in tariffs. One person also suggested expanding and implementing State Renewable Portfolio Standards while others stated a general need for much stronger policy driven initiatives for renewable energy.

Priorities such as investment, regional empire, improve business opportunities, and procedural innovation comprises the medium frequency category. A regional empire includes priorities centered on making the Pacific Northwest a hub for development, production, and innovation in clean technology at an international scale. Procedural innovation includes strategies such as streamlining siting, construction of technology deployment test beds, building transmission, and local food optimization.

Strategies such as streamlining expertise, universities and research innovation, air quality and water quality, and outreach and education comprise the low frequency category. 'Streamlining expertise' refers to suggestions centered on consolidating and re-focusing the clean technology industry on a more narrow and manageable goal.

Table 4. Top economic priorities of the Northwest

Response	Frequency	
Policy change	high	18
Energy	high	15
Investment	medium	8
Regional empire	medium	8
Improve business opportunities	medium	8
Procedural innovation	medium	6
Streamline expertise	low	3
Universities and research innovation	low	3
Air and water quality	low	2
Outreach and education	low	2

(Source: 2010 Pivotal Leaders Survey)

Note: some respondents provided multiple answers for this question

Sponsor's Role in the Network

Question: Our sponsors are committed to the Pivotal Leaders Network objectives. What can they do to help create value for you?

Table 5 is a frequency table highlighting open-ended responses that appeared at high, medium, and low frequencies by survey respondents.

As illustrated in Table 5, approximately one third of the respondents stated a desire for the sponsors of the network to help advocate for the clean technology industry (the high frequency response). Respondents asked that sponsors help get industry advocacy aligned with business and job creation and commit to deploying the technology of the companies developing green solutions in the region. Specific advocacy recommendations included a commitment to fleet vehicle purchases and advocating for sound economic and fiscal policies that encourage business and capital formation.

The categories 'network opportunities' and 'unsure' comprise the medium frequency category. Those who desired 'networking opportunities' suggested the sponsor could convene, facilitate, and support opportunities for leaders to communicate with other leaders who share similar goals and backgrounds. As Pivotal Leaders is a new organization and still in its planning stages, many respondents were unsure of exactly what role the sponsors should play in adding value to the network.

Strategies such as connecting with market opportunities, technical support, improve the economic climate, and 'other' were suggested at low frequency. Respondents categorized as 'other' provided suggestions that did not fit into any of the above categories, and included suggestions such as, "don't fall into/be coopted by the politically correct/soft-headed "progressive" trap and "do not overly commercialize this group."

Table 5. Sponsor's role in network

Response	Frequency	
Advocates of the industry	high	9
Unsure	medium	6
Network opportunities	medium	5
Connect with market opportunities	low	3
Technical support	low	2
Improve economic climate	low	2
Other	low	3

(Source: 2010 Pivotal Leaders Survey)

Note: some respondents provided multiple answers for this question

Three Words to Describe Pivotal Leaders Network

Question: Please list three words you would use to describe the Pivotal Leaders Network.

Table 6 is a frequency table highlighting open-ended responses that appeared at high, medium, and low frequencies by survey respondents. Based on thesaurus synonym groupings, we took the 70 words provided by survey respondents and narrowed the words down to 14 separate word group categories.

Survey respondents view the network as a place for new and emerging ideas and practices in the clean technology sector. In terms of high frequency responses, the most commonly occurring words described the network as both active and emerging. Respondents viewed the network as a place for innovation and great potential growth

Words such as practical, unique, network, and leadership were listed at medium frequency. Words such as progressive, knowledge, uncertainty, excitement, entrepreneurial, and green were listed at low frequency.

Table 6. Words to describe the network

Word Group	Frequency	
Active	high	9
Emerging	high	9
Innovative	high	8
Potential	high	8
Practical	medium	7
Unique	medium	6
Network	medium	6
Leadership	medium	5
Progressive	low	3
Knowledge	low	3
Uncertainty	low	3
Excitement	low	2
Entrepreneurial	low	2
Green	low	2

(Source: 2010 Pivotal Leaders Survey)

Strategies Used by Other Organizations

Question: Pivotal Leaders Network is interested in learning from past experiences you've had with organizations that significantly impacted your career and/or business. What did they do that you think Pivotal Leaders should do?

Table 7 is a frequency table highlighting open-ended responses that appeared at high, medium, and low frequencies by survey respondents.

In terms of high frequency responses, as depicted in Table 7, the highest number of respondents desire that the network help to serve as an agent of change. Specifically, these respondents desired that the network is not highly structured or rigid; but rather is a place of information flow and idea sharing. One person noted that ad hoc organizations have the greatest potential for meaningful impact because they do not have an assumed 'mandate to perpetuate' the organization while another noted the importance of minimizing the process and maximizing free-flowing conversation around key topics. Capacity for strong networking opportunities again rated high in terms of other successful organizations. Another notable suggestion shared by a couple respondents was the importance of efficient time utilization. Specifically, one person noted that the network must be both compelling and convenient to bring leaders together to commit time and money.

Strategies such as strong leadership, identified goals, awareness, building interpersonal relationships, information sharing, and efficient use of members' time were cited at medium frequency. The term 'identified goals' refers to the desire to define specific, measurable goals for the network.

Strategies such as policy agenda, minority inclusion, and funding were suggested with low frequency. The individual who suggested minority inclusion noted that the State of Montana has aggressively recruited BME (black-minority-ethnic) while the person

who noted funding as a useful strategy specified funding promising companies that have true potential to make positive change.

Table 7. Strategies used by other organizations

Response	Frequency	
Agent of change- unstructured	high	5
Networking	high	4
Strong leadership	medium	2
Identified goals	medium	2
Awareness	medium	2
Build interpersonal relationships	medium	2
Information sharing	medium	2
Efficient use of time	medium	2
Policy agenda	low	1
Minority inclusion	low	1
Funding	low	1

(Source: 2010 Pivotal Leaders Survey)

Note: some respondents provided multiple answers for this question

Desired Benefits of the Network

Question: What would you like to get out of the Pivotal Leaders Network? [Please rate the following based on your preference.]

As illustrated in Table 8, networking opportunities again tops the charts in terms of key deliverables of the network. Eighty-two percent of respondents rated networking at 4 or 5 (most preferred). In addition, access to experienced Northwest leaders in the clean energy industry also proved significant, with a rating of 4 or 5 from 72% of respondents. Other services desired from the network by survey respondents included new learning opportunities, increased access to capital, and new career opportunities.

Table 8. Desired benefits of the network

	Least Preferred			Most Preferred		Total Respondents
	1	2	3	4	5	
Networking opportunities	0%	4%	15%	41%	41%	27
Access to other experienced NW Leaders	0%	7%	11%	36%	46%	28
New learning opportunities	0%	7%	22%	44%	26%	27
Increased access to capital	7%	15%	22%	11%	44%	27
New career opportunities	41%	26%	19%	7%	7%	27
Increased exposure from media coverage	4%	15%	22%	41%	19%	27
Shared resources	0%	12%	35%	42%	12%	26
Attract talent to my company	4%	19%	22%	30%	26%	27
Opportunities to mentor	19%	33%	33%	11%	4%	27
Investment opportunities	19%	48%	19%	7%	7%	27

(Source: 2010 Pivotal Leaders Survey)

Additional Opportunities

Question: Please describe any additional ideas or opportunities you see.

The question stated above was answered by only 12 of the survey respondents. A number of responses to this question focused on the structural make-up of the organization. One person suggested that pivotal leaders could over time become more involved in directly recommending its members for leadership positions in clean tech companies.

Respondents were also in favor of the Pivotal Leaders Network as a means of sharing technical advice. One person mentioned short tutorials on key aspects of leading a clean tech company to members as a possibility. A few respondents also emphasized the need for the Pivotal Network to get CEO's and executives to commit time to participate; possibly by mentoring CEO/CTO's. One person cited the need to "each 'blue state' leaders to be business smart so that capital and talent leading to high-wage jobs are attracted, not repelled."

Engagement Strategies

Question: What is the best way for members of Pivotal Leaders to engage with each other? [Please rank your choices by dragging the statements in order from 1 to 6]

As seen in Table 9, private, 'members only' gatherings is a top engagement strategy desired by survey respondents. These gatherings were rated as either a best or second best engagement tactic by 86% of respondents. Also significant, 70% of respondents rated larger network events with key thought leaders as either a best or second best tactic. Support for social media accounted for the least amount of network backing.

Those who responded 'other' included the following suggestions:

- Advocate for a small set of truly effective cleantech economic development policies
- Joint state lobbying
- Academic institution visits--new tech review
- Private member gathering with one or two thought leader invited guests
- CEO Roundtable
- Regular First Wed, no agenda happy hours

Table 9. Engagement strategies for network leaders

	Best					Worst		Responses
	1	2	3	4	5	6		
Private "Members Only" gatherings	56%	30%	11%	4%	0%	0%	27	
Private "Members Only" section of the website	0%	4%	41%	26%	22%	7%	27	
Non-work activities	4%	7%	19%	37%	30%	4%	27	
Larger networking events (with key thought leaders)	33%	37%	19%	7%	4%	0%	27	
Social media	0%	11%	7%	22%	41%	19%	27	
Other	7%	11%	4%	4%	4%	70%	27	

(Source: 2010 Pivotal Leaders Survey)

Network Structure

Question: There are a number of ways we can structure the Pivotal Leaders Network. Which of the following ways would you be interested in participating? [Please rank your choices by dragging the statements in order from 1 to 7]

As depicted in Table 10, small lunches with other leaders is the way most leaders would be interested in participating; 85% ranked this option a 1 or 2 out of 7. Notably, very few individuals surveyed are interested in being a blogger or a mentor for the network. Serving as an ‘advisory resource in an informal way to others’ was one specific suggestion from the ‘other’ category.

Table 10. Desired strategies for engaging leaders

	Most						Least	Responses
	1	2	3	4	5	6	7	
Small lunches with other leaders	48%	37%	7%	7%	0%	0%	0%	27
Columnist	11%	15%	11%	44%	11%	7%	0%	27
Blogger	0%	0%	4%	26%	56%	11%	4%	27
Mentor	0%	4%	22%	4%	26%	44%	0%	27
Network gatherings (1 - 2 per year)	26%	30%	30%	7%	0%	7%	0%	27
Network gatherings (3 + per year)	15%	11%	26%	7%	7%	26%	7%	27
Other	0%	4%	0%	4%	0%	4%	89%	27

(Source: 2010 Pivotal Leaders Survey)

Member Contributions

Question: Which of the following could you contribute to advance the Pivotal Leaders Network? [Please check all that apply.]

In terms of contributions to the network, 88% of leaders feel they have valuable experiences that would contribute to the network’s goals and mission. Also notable is that almost three-fourths of the respondents have unique connections that could help to advance the network.

Those who responded as ‘other’ listed the following additional contributions:

- Legal perspective
- Drinking stories

Table 11. Personal contributions to the network

Contribution	Percent
Special talent	20%
Resources	24%
Skills	40%
Experiences	88%
Unique connections	68%
Other	16%
Total Respondents	25

(Source: 2010 Pivotal Leaders Survey)

Question: Please elaborate on what you could contribute to the Pivotal Leaders Network.

There were 13 responses to this question. Contributions to the network centered on knowledge and expertise in the field as well as connections.

In terms of knowledge and expertise, respondents cited capabilities in starting a new company and other general business knowledge, trade and business organizations, technology, being a 'sustainability' practitioner, and knowledge of the built environment.

As far as connections are concerned, respondents cited relations with key policy and decision makers, higher education institutions, and a variety of private business sectors, regulators, and philanthropists.

Small Lunch Meetings

Question: Please indicate which Pivotal Leaders you would like to meet during a small lunch which will include 4 - 6 leaders and be organized by the steering committee. (Check all that apply.)

Question: Please indicate which sponsors you would like to meet during a networking event. (Check all that apply)

Please see table below for a detailed outline of respondents' preferences for questions #17 & #18.

Table 12. Matching up leaders with other leaders and businesses

	Respondent	Pivotal Leaders	Sponsors
1	Allen Alley	n/a	n/a
2	David Vant Hof	Rick Luebbe, EnerG2; Tim Miller, Green Lite Motors Corporation; Dave Curry, Demand Energy Networks; Aaron Goldfeder, EnergySavvy; David Kaplan, V2Green; Jeff Kim, Shorepower Technologies	Pivotal Investments, Ernst & Young, University of Oregon, Iberdrola Renewables, NW Natural, Portland Development Commission, Nike, Portland State University, UK Trade & Investment
3	Dave Allen	Michael "Kipp" Baratoff, Equilibrium Capital Group; Mark Edlen, Gerding Edlen Development; Derek Smith, Clean Energy Works Portland; Jules Bailey, OR State Legislature; Rob Bernard, Microsoft; Pat Egan, Pacific Power; David Van't Hof, Lane Powell; Kim Zentz, Sirti	Pivotal Investments, University of Oregon, Weyerhaeuser, Perkins Coie, Portland Development Commission, Nike, PSU
4	Jules Bailey	n/a	n/a
5	Roby Roberts	No preference.	n/a
6	Mark Edlen	Rob Bernard, Microsoft; Gregg Patterson, PV Powered	n/a
7	Tim Miller	Michael "Kipp" Baratoff, Equilibrium Capital Group; Mark Edlen, Gerding Edlen Development; Rob Bernard, Microsoft; Gino Borland, Cake Ventures, LLC; David Kaplan, V2Green; Jean Wilson, Sunpower Corp.	Pivotal Investments, Ernst & Young, Iberdrola Renewables, Nike, UK Trade & Investment
8	Skip Rung	David E. Allen, McKinstry Ash Awad, McKinstry Michael "Kipp" Baratoff, Equilibrium Capital Group, Bill Cambell, Equilibrium Capital Group, EgRM Mark Edlen, Gerding Edlen Development, Rick Luebbe, EnerG2; Gregg Patterson, PV Powered; Joe Whitworth, The Freshwater Trust; Allen Alley, Pixelworks	Pivotal Investments NW Natural, Weyerhaeuser, Portland State University
9	Jesse Berst	David E. Allen, McKinstry Ash Awad, McKinstry Bill Cambell, Equilibrium Capital Group, Rob Bernard, Microsoft Dave Curry, Demand Energy Networks	Pivotal Investments, Ernst & Young
10	Jeff Kim	No preference.	Ater Wayne Nike
11	Aaron Goldfeder	n/a	n/a
12	Kim Zentz	No preference.	all
13	Alan Hickenbottom	David E. Allen, McKinstry Ash Awad, McKinstry Michael "Kipp" Baratoff, Equilibrium Capital Group Jesse Berst, GlobalSmartEnergy Bill Cambell, Equilibrium Capital Group, EgRM Derek Smith, Clean Energy Works Portland Jules Bailey, OR State Legislature Pat Egan, Pacific Power	NW Natural
14	Ron Pernick	Mark Edlen, Gerding Edlen Development	all
15	Joe Whitworth	Rob Bernard, Microsoft; Gino Borland, Cake Ventures, LLC; Ron Pernick, Clean Edge, Inc.; Skip Rung ONAMI	Pivotal Investments, Nike, UK Trade & Investment
16	Kelly Ogilvie	n/a	n/a

17	Rob Bernard	David E. Allen, McKinstry; Ash Awad, McKinstry; Roby Roberts, Horizon Wind Energy; Joe Whitworth, The Freshwater Trust; Jules Bailey, OR State Legislature; Ross Macfarlane, Climate Solutions	Stoel Rives LLP, Nike
18	Dave Curry	David E. Allen, McKinstry; Jules Bailey, OR State Legislature; Pat Egan, Pacific Power	Iberdrola Renewables, Weyerhaeuser
19	Pat Egan	Tyson Keever, SeSequential Biofuels, Inc. Rob Bernard, Microsoft Jean Wilson, Sunpower Corp.	Ernst & Young
20	Gino Borland	Ash Awad, McKinstry; Bill Cambell, Equilibrium Capital Group, EgRM; Alan Hickenbottom, Tanner Creek Energy; Roby Roberts, Horizon Wind Energy; Ron Pernick, Clean Edge, Inc.; Jean Wilson, Sunpower Corp.	Iberdrola Renewables, Stoel Rives LLP, Perkins Coie
21	Ross MacFarlane	Ash Awad, McKinstry Michael "Kipp" Baratoff, Equilibrium Capital Group Jesse Berst, GlobalSmartEnergy Bill Cambell, Equilibrium Capital Group, EgRM Mark Frohnmayer, Arcimoto Rick Luebbe, EnerG2 Gregg Patterson, PV Powered Roby Roberts, Horizon Wind Energy Allen Alley, Pixelworks Jules Bailey, OR State Legislature Rob Bernard, Microsoft Jeff Kim, Shorepower Technologies Ron Pernick, Clean Edge, Inc. Jean Wilson, Sunpower Corp.	Pivotal Investments Ernst & Young University of Oregon Iberdrola Renewables NW Natural Stoel Rives LLP Weyerhaeuser Perkins Coie Portland Development Commission Ater Wayne Nike Portland State University
22	Dave Kaplan	n/a	n/a
23	Darcy Winslow	David E. Allen, McKinstry Mark Frohnmayer, Arcimoto Tim Miller, Green Lite Motors Corporation Roby Roberts, Horizon Wind Energy Skip Rung ONAMI Jean Wilson, Sunpower Corp.	Pivotal Investments, University of Oregon, NW Natural, Stoel Rives LLP, Perkins Coie, Portland Development Commission, Nike, Portland State University
24	Ash Awad	No preference.	University of Oregon, Weyerhaeuser, Portland Development Commission, Nike, Portland State University
25	Kipp Baratoff	David E. Allen, McKinstry Gregg Patterson, PV Powered Gino Borland, Cake Ventures, LLC Kelly Ogilive, Blue Marble Energy	University of Oregon, Weyerhaeuser, UK Trade & Investment
26	Bill Campbel	David E. Allen, McKinstry; Ash Awad, McKinstry; Michael "Kipp" Baratoff, Equilibrium Capital Group; Jesse Berst, GlobalSmartEnergy; Mark Edlen, Gerding Edlen Development; Mark Frohnmayer, Arcimoto; Alan Hickenbottom, Tanner Creek Energy; Tim Miller, Green Lite Motors Corporation; Gregg Patterson, PV Powered; Roby Roberts, Horizon Wind Energy Derek Smith, Clean Energy Works Portland; Allen Alley, Pixelworks; Jules Bailey, OR State Legislature; Dave Curry, Demand Energy Networks; Pat Egan, Pacific Power; Aaron Goldfeder, EnergySavvy; Ross Macfarlane, Climate Solutions; Kelly Ogilive, Blue Marble Energy; Jean Wilson, Sunpower Corp.; Kim Zentz, Sirti	University of Oregon, NW Natural, Weyerhaeuser, Nike, Portland State University UK Trade & Investment

27	Kelly Ogilvie	David E. Allen, McKinstry Michael "Kipp" Baratoff, Equilibrium Capital Group Bill Cambell, Equilibrium Capital Group, EgRM Rob Bernard, Microsoft Gino Borland, Cake Ventures, LLC Ron Pernick, Clean Edge, Inc.	University of Oregon, NW Natural, Weyerhaeuser Nike, UK Trade & Investment
28	Mark Frohnmayer	Michael "Kipp" Baratoff, Equilibrium Capital Group Bill Cambell, Equilibrium Capital Group, EgRM Gregg Patterson, PV Powered Derek Smith, Clean Energy Works Portland Darcy Winslow, Designs for a Sustainable World Collective Rob Bernard, Microsoft Gino Borland, Cake Ventures, LLC David Kaplan, V2Green Ross Macfarlane, Climate Solutions Skip Rung ONAMI	all
29	Jean Wilson	No preference.	n/a
30	Tyson Keever	Mark Edlen, Gerding Edlen Development Mark Frohnmayer, Arcimoto Alan Hickenbottom, Tanner Creek Energy Tim Miller, Green Lite Motors Corporation Jules Bailey, OR State Legislature Rob Bernard, Microsoft David Kaplan, V2Green Jeff Kim, Shorepower Technologies Skip Rung ONAMI	Pivotal Investmentsm, Ernst & Young, University of Oregon, Iberdrola Renewables, Portland Development Commission
31	Rick Luebbe	No preference.	Iberdrola Renewables, NW Natural, Weyerhaeuser

CONCLUSION

The Pacific Northwest has a wealth of talented business leaders who are participating or want to participate in building vibrant companies targeting more productive use of resources. Members of the Pivotal Leaders have clearly indicated a wealth of skills, knowledge, motivation and business experience they can bring to the table in assisting with the development and deployment of the clean technology industry in the Pacific Northwest.

Network members are leaders at both their company and in their respective fields. Survey respondents have indicated that the Pivotal Leaders are both ambitious and highly innovative. Many have ambitions to gain economic prosperity for their companies as well as for the region. They see technology as an important tool for achieving economic, social, and environmental sustainability.

In return, leaders desire a network that is a place for business networking and information sharing. Numerous respondents desire a network that can help facilitate the exchange of technical skills, business and legal advice, and experiences. Many also envision the network as an organization that will help initiate policy changes to advance the clean technology industry. In addition, leaders see the network as a place for reaching out to new participants in the clean technology industry. Examples of new participants could include educational institutions, governments and regulators, other businesses operating in the Pacific Northwest, as well as the general public.

The results from this survey will be used by the Pivotal Leaders Network steering committee to make decisions on how to structure the Network and the role it can play in creating a clean technology economy in the Pacific Northwest.

APPENDIX A

The following is a list of clean technology sectors represented by survey respondents (verbatim):

Automotive / transportation
Building operating asset managers creating value from the sustainability transformation
Clean Energy Generation
Clean energy project finance
Clean tech and clean energy
Clean tech consulting
Clean tech financing and policy
Commercial real estate development
Energy
Energy efficiency, renewable energy, and smart building projects and services.
Energy efficiency, renewable energy, sustainable design, construction and facility Management
Energy Efficiency and Renewable Energy
Energy Storage
Energy Storage
Finance
Law
Micro- and nano-scale technologies (materials science and devices)
Non-Governmental Organization
Non-profit clean energy advocacy and support
Public Sector Technology Business Accelerator
Renewable Chemicals / Energy
Renewable Energy
Residential Energy Efficiency
Smart Grid
Software
Solar Power Development, Manufacturing and EPC
Sustainability Consulting (Corporate, Academia, NGO)
Transportation
Transportation Electrification

APPENDIX B

The following is a list of open ended answers use to construct frequency tables in the report.

Question 4: As you compare your current involvement in the clean technology industry today, where do you aspire to be three years from now?

Either to have built a robust clean tech legal practice or to have joined a clean tech company in a leadership role

National leader in sustainable design, build, operate

Develop one major project in the NW each year Develop 1000 MW per year in North America Have the solar development group fully functioning

Running a company that is just about to turn cash flow positive, marketing ultra efficient, unique vehicles.

\$80-100M/year in micro/nano sponsored research in Oregon, about two-thirds of which will be directly applicable to clean tech (energy efficiency, energy and water efficiency. Early stage and VC funds raised by spinout companies from these efforts will be in the top quartile nationally (per capital basis).

Leading the next wave.

Leading a highly profitable business.

Net zero and regenerative buildings

My ideal scenario has me involved in leading a high growth, private sector clean energy technology company with a solid go-to-market strategy. I especially love the building of successful management teams and the activities associated with raising capital.

Driving large impact across the company and for our customers.

Rather than my own aspirations, its probably better to talk about it in terms of where I'd like to see Tanner Creek Energy. If the company meets its goals I'll meet mine. In three years, we would hope that Tanner Creek Energy is one of the most successful and respected energy efficiency and renewable energy solution providers in the NW.

To be a growing profitable vendor of Smart Energy Storage systems to the Utility industry

Strategic intent is to drive the operationalizing of environmental markets around water at scale.

Providing leadership in the transition to new technology development and deployment. To achieve this, my hope is that in whatever role I play, I can assist in that transition by proactively supporting commercially viable products and services that are scalable. Examples of this are the deployment of electric vehicles and charging associated, energy management software, micro-hydro and biomass and further

development and refinement of existing technology that must be made more economically viable such as small scale nuclear and solar generation.

Running a clean tech company.

Continuation of my current business, with greater reach to multi-national, influential companies in multiple industries that have a significant impact on climate change, natural resource usage and working with them to effect systemic change towards a planet in equilibrium. Continued expansion of my reach into higher education and working with emerging leaders around the world to insure intergenerational leadership is in place.

Today, our involvement is on a local, regional, and select federal basis. We would expect in 3 yrs to have a coast to coast voice on clean energy tech. We would also expect that today there is much talk about clean tech, and we would expect that in 3 years action and implementation of clean technologies nationally will be clear and not speculative.

Passing legislation that moves the needle on clean energy investment in Oregon and sets a national standard.

I do not consider myself in the clean tech industry. That said, I aspire to be creating impact (financially, socially, environmentally) in whatever i am doing 3 years from now.

Would like to be an engaged participant in a growing and thriving sector in the region. Aspire to contributing in whatever way is highest and best use of my skills, background and connections.

I want to see the trends we are initiating beginning to drive fundamental change in the way trillion dollar basic industries do business.

At full production with two facilities, integrating upstream to reduce feedstock risks.

I'd like to be well on the way to completion of my first set of clean tech project goals - rebooting transportation and getting my commercial redevelopment to net zero.

In three years we'd like to have an operational business accelerating widespread clean energy projects via innovations in project finance.

Profitable with at least \$5M in revenues.

Many more MWs installed

More established, proving out our model

For our technologies to be prevalent in their respective industries.

We've been working in clean tech for nearly a decade. In the beginning the main issue was educating various stakeholders on the emerging sector and opportunities. In 2001, the goal was to put this on the agenda of politicians, corporates, and entrepreneurs, and other key constituents. The sector was nascent at the time. Today, clean tech is firmly established and the objective/goal of our organization is not so much to educate folks about the emerging opp (that's been done), but to help them

navigate the opportunities. My goal is to continue to bolster our ability, via publications, databases, events, and other activities, to help a range of players move forward aggressively with their clean-tech initiatives, and to identify real opportunity vs. hype. One of our newest initiatives, The U.S. Clean Energy Leadership Index, aims to do that for economic development organizations, utilities, corporates, and other audiences. The index ranks all 50 states on their clean-energy activities in technology, policy, and capital deployment and initiatives.

I hope to see my company leading transformations in Clean Tech through the development and commercialization of advanced energy storage technologies

Question 5: What are three things that the Pivotal Leaders Network can do to bring value to your efforts to advance your business?

Provide access to fellow leaders that might seek legal services; provide visibility of myself to the clean tech community

Connections to myriad aspects of the clean tech/clean energy cluster

Educate the public regarding the positive benefits of clean energy Educate government and regulators regarding the positive benefits of clean energy Create informal peer network in the NW

1) Get investors to look at Pivotal Leaders' companies and actually place some bets. That's also number 2 & 3. But to be more complete: 2) Help Pivotal Leaders' leverage each others' expertise and contacts for specific needs -- such as finding someone who can help find manufacturing partners in China, or other specific queries like that. 3) Help organize idea round tables where, for example, a small group of Pivotal Leaders would look at each other's companies and provide input/ideas -- could be through a series for 5 coffee sessions to learn about and give ideas to a peer group of 5 entrepreneurs.

1. Mentor PNW cleantech entrepreneurs and management teams 2. Attract favorable attention and early stage capital to the region 3. Collaborate to exploit university capabilities more effectively than other regions do

Sorry, nothing occurs.

Tactical networking opportunities with high signal to noise. PR opportunities.

market regional expertise outside of the region

1. Provide opportunities to really get to know the other Pivotal Leaders. 2. Organize the Pivotal Leaders around having a voice in establishing strategy and policy for OR and WA in establishing and growing a global leadership position in the clean energy economy. 3. Facilitate ways that Pivotal leaders can mutually support one another's professional, business and personal objectives.

leveraging collective "bargaining" power to influence and change issues in the Pacific NW Sharing best practices

1) A sounding board for new ideas, products. 2) A great inside information source on the NW clean tech sector. Understanding and predicting the trends just ahead of the

competition will be critical for success. 3) A mutual benefit society, so to speak, to help each other advance our individual goals whether they be in the public or private sector through collaboration, networking.

1. Collaboration among companies in the network 2. Sharing experiences in the market through networking 3. Partnering with other companies in order to offer complete market solutions

1. Help me figure out/develop needed financial vehicles. 2. Vet my narrative/messaging. 3. Help me refine "the pitch" to foundations/early market investors/lenders.

1. Networking and providing a collegial and collaborative environment 2. Facilitating opportunities to review technologies, and particularly the underlying economics 3. Better establishing connections between academic development of technology and business deployment of commercially viable technology

Access to other good people in the field.

Introductions to companies ready to adopt new business principles Inclusion in networks of leaders engaged in this work Collaboration and partnership - there's plenty of work in this space to go around!

1. Network with others. 2. A group that has a voice that is recognizable and appreciated. 3. A group with true leaders in this space.

1. Help identify policies needed to support the clean economy 2. Network with those that have shared goals in the clean economy 3. Provide technical support as needed. For example, Tyson Keever and I just sat down to discuss how we can keep biodiesel standards in the RFS relevant for local WVO biofuels producers.

network

Increase integration and participation of broader network of qualified business leaders in building clean energy economy in region. Increase awareness of need for coordinated efforts across "silos" on both policy and economic development issues. Increase awareness in investment community of exciting opportunities in region and qualified pool of management and entrepreneurial talent.

1) Calibration and resource network 2) Policy support in legislatures/ governments 3) Skeptical idea co-development.

Access to other entrepreneurs, access to experts in areas where startups lack: operations (scale) experience, fundraising experience to navigate the shifting capital markets (including non traditional finance - government grants, private equity, exotic instruments, debt, etc.).

Elevate awareness of the business and the solution we're providing Access to capital Access to partnerships

Access to debt financing.

Greater recognition of commercialization of solar, Higher PacificNW visibility for SunPower

1. Draw out learned experiences from others 2. Showcase success stories for motivation 3. Help find affordable capital

Debt financing

1) Networking, 2) potential access to capital (we've never taken in outside capital, but might need/want in the future), 3) peer support and dialogue

1) Develop the network as a resource for specific sources of expertise 2) Highlight the importance of Clean Tech enterprises on the economy and society 3) Bring in leaders from large corporations to help influence their investment and direction in clean tech technologies

Question 7: What should the region's top three priorities be relative to the economic opportunity for clean technology?

1. Create best investment climate in the country for clean tech using combination of tax incentives, regulatory streamlining or support, leveraging private capital and the like.

Real incentives from government to accelerate investment Consolidate efforts in CT to a few advocate organizations Build a brand. Quit sitting back on our "were hip" laurels and compete for top of mind

Expand and implement State RPS Build transmission Streamline siting

1. Figure out ways to mobilize funding -- whether through policy tools, or investor education, or risk mitigation (such as by diversifying risks through bets on multiple companies, or reducing the risks in the companies themselves). 2. Boost/stabilize key levers like Oregon's BETC, which helps both company investments and customer demand. 3. Get clear on why a company should create jobs here vs in China or Alabama, and which kinds of jobs should be here. If looking for manufacturing jobs, figure out how to make that pencil for the companies involved.

1. Build and recruit the world's best management teams 2. Advocate for universities and research institutions - make them stronger 3. Attract capital

Vision of a (for)Evergreen Washington Roadmap to get their Messaging campaign

More investment activity, more harnessing cleantech+IT to leverage MSFT/Amzn talent pool, more networking.

market regional expertise outside of region price fuel a true cost seek divergent partnerships private/private as well PPP

1. Serving global markets 2. Creating the most advantageous environment for starting, growing and running your clean technology business. 3. Leveraging all tangible and intellectual/human assets to solve global grand challenges in the energy/clean technology space.

Enable acceleration of green power in the state Better public transportation Clean up horrible air and water quality in region

1) Helping to move policy in the right direction through active participation in the public sector process. 2) Strive to create opportunities that don't require public policy to move forward. 3) Use this "bully pulpit" to advocate for the clean tech sector in general as it pertains to future economic and employment growth in the region.

1. Regulatory leadership 2. State and local govt participation in green projects 3. Tax incentives for green technology deployment

1. Regulatory alignment on outcomes: what we intend to bring about will then drive the melting away of outmoded procedures and drive prioritized investment. 2. Cross-boundary agreement on making this region the world's green epicenter. 3. Marketing to investors that green businesses here will be encouraged to succeed.

1. Focused support for higher education--both technology development and highly skilled workforce 2. Focusing more on a favorable overall business environment (tax, regulatory, workforce) than raw subsidies 3. Matching strong policy and subsidy supports with regular review of how the supports are working in the marketplace

1. Carbon tax 2. Regional clean tech innovation center(s) - universities, tech companies, etc. 3. Real-world technology deployment test beds - electric utilities, etc.

Positive financial incentives to adopt clean tech Incentivize public and private enterprises to hire 'green' talent - work with local universities to insure there is a talent pipeline "Hospice" out old technology and business processes (and businesses) that no longer serve us via significant taxes or exposing the true cost of these old technologies/resources.

1. Green buildings and energy efficiency. 2. Smart Grid 3. BioEnergy

energy efficiency/smart grid distributed wastewater green buildings

Establishing durable policies that promote clean technology Increasing regional focus on promising clean energy economic opportunities and promoting integration between sectors Increasing public and private investment funds for bringing clean technology to scale in region and supporting promising companies.

Smart grid Efficiency is Energy Water re-use

1) Tax policy - an onerous sales tax makes this region uncompetitive. 2) Standard Offer Contracts - renewable power is almost a non-starter as a result of cheap hydropower in the NW. Feed-in Tariffs would create certainty and bankable contracts for renewable energy companies. 3) Regulatory framework revision - permitting is a very difficult process for renewable chemical and energy companies. A new framework or advocate at the state level that actively assists companies in this process would be a tremendous help.

green building/efficiency improvements transportation local food production optimization

1. Invest 2. Invest 3. Invest

Transportation electrification Petroleum alternatives Alternative energy sources

Much stronger policy driven initiatives for renewable energy. It is a travesty that New Jersey has much more robust incentives for solar than Oregon, Washington and the entire NW combined.

1. Push regional policy for a larger consistent marketplace for which to do business 2. Access to capital 3. Access to talent

Well, we are competing with a key dozen or so states in our nation, plus dozens of other countries that are seizing the clean-tech opportunity. So what does our region do to stay ahead? I think there are more than just three, but here's a quick take at three of the most important: 1) Develop venture strategy. CA and MA lead in venture capital deployment for clean tech. In terms of total VC dollars raised nationally by state, WA ranks number 10 and OR number 17 over the past three years, far behind other regional leaders. We need to develop strategies to not only build our own venture talent and infrastructure, but to attract outside investors. This type of capital is critical to early stage companies and something that is currently sorely missing. 2) Pick our strongest sectors and focus/hone our efforts. In our 2008 report with Climate Solutions we picked the top 5 sectors for clean-tech activity in the NW. This list could change over time (for example, electric vehicles and EV infrastructure made it into our runners up list, but now looks like a top 5 contender). We need to focus on a number of key areas so that academic institutions, emerging players, established firms can tap the inherent value that comes with cluster development and cross fertilization. This isn't an easy thing to achieve, and it's hard to place bets on which sectors will actually rise, but with the competition we face globally it's critical we pick our top sectors and nourish them. 3) Education, education, education and opportunity, opportunity, opportunity. We need to develop, attract, and retain the leaders of the future via world-class academic and training programs and via rich regional opportunities for people's careers. I can't tell you how many people I know who've left the region for real/perceived "greener" pastures in terms of advanced education or work opportunities. That doesn't bode well for our region if we can't turn that around. Of course, the other big and critical factor is the policy landscape. Each state in the region has their own tools and initiatives. But this is a critical area for attention from a macro perspective.

Clean Tech needs "mass" for economic success in our region: 1) Coordinate local government activities in support of clean tech to allow for more regional collaboration between companies 2) Focus on sub-set of clean tech business area to concentrate expertise and available resources 3) Encourage large industries with NW focus to get more involved in clean tech industries and R&D

Question 8: Our sponsors are committed to the Pivotal Leaders Network objectives. What can they do to help create value for you?

Continue to provide networking opportunities and visibility

Get advocacy aligned with business and job creation

Be early customers/beta customers of Pivotal Leaders' products. Provide technical support/testing/etc. at no cost. Identify labs/tools/facilities that could be shared by multiple companies and fund them.

Advocate effectively for public (federal and state) funding of higher education (especially graduate degrees) and research institutions - make the connection between these and economic health, in particular average wages. Advocate for sound economic/fiscal policies that encourage business and capital formation. Don't fall into/be coopted by the politically correct/soft-headed "progressive" trap.

Nothing occurs

Be active participants in the network. The more we know about each other the more we will begin to more fully identify our strengths as a region and thus, to leverage those strengths into a regional competitive advantage.

Set a handful of mutual goals we can work on together.

Not sure how to answer this. But if you want to break it down to the exact question "help create value for you." it would be helping me (Tanner Creek Energy) to better connect with possible market opportunities.

Commit to deploying the technology of the companies developing green solutions in the region.

1. Leverage media contacts to get our perspectives popularized (e.g., Sustainable Industries Journal). 2. Support the activation of the network; sponsor discussion groups, etc. 3. TBD

Support the 3 objectives stated above and be fearless in articulating the need for promoting commercially viable products and services that will transition. More to the point, there is a long list of technically feasible products and services. Business leadership needs to focus in on those technologies that have broad commercial application and put effort behind supporting those first and foremost.

Need to understand the sponsorship model better (and the sponsors intentions). This is difficult to answer at this point.

do not overly commercialize this group.

What are the stated objectives? I am confused if these are pre-determined or if the network is developing them now.

Would like to discuss opportunities for better integration with our Business Leaders for Climate Solutions and other business networks.

Who are they?

Make themselves available for networking, opening their networks, and creating opportunities for business to occur. Perhaps provide a discount to Pivotal Leader companies.

Commit to fleet vehicle purchases of Arcimoto vehicles -- great advertising for their brands!

Legal services Policy advocacy Early adopter customers

Networking opportunities with potential customers and financing.

Help bring leaders together

The network is so new, and I was unable to attend the first event because of scheduling conflict. I'm currently uncertain what advice to offer the sponsors, but I'm certain I'll have more ideas over time as the network and community develops.

Not sure

Question 9: Please list three words you would use to describe the Pivotal Leaders Network.

Innovative, Interesting, Collegial

Buzz, Innovators, Action

Aspiring, Motivated, High-leverage

Nascent, Diverse, Talented

Seminal, Cleantech, Forward thinking

Nascent, good idea

Unique, Promising, High-Potential

Active Connected, Engaged

Entrepreneurial, Visionary, Risktakers

Next, Applied, Catalyzing

Bold, Dynamic, Objective

Unknown, Possibilities, Untapped

Passion, knowledge, forward-thinkers

New, unclear, uncertain

Smart, dynamic, engaged

Forward-thinking, Practical, Mission-driven

Innovative, Community, Network

Nascent, inspired, potential

Networking, Knowledge, Innovative

Professional, Green, Leaders

Engaging, Dynamic, Optimistic

Innovative, Leading, Opportunity

Emergent, Leadership and Entrepreneurial Focused, Working to Connect Local Leaders and Connect the Dots

Active, regional, young

Question 10: Pivotal Leaders Network is interested in learning from past experiences you've had with organizations that significantly impacted your career and/or business. What did they do that you think Pivotal Leaders should do?

Closest I can think of is American Leadership Forum (ALF). Creates a class of leaders and then a network of former alums and ongoing opportunities to network within the group.

Get noticed, period. Our pivotal leaders need help getting a voice to the public and elected as well

1. Clean Tech Open opened up access to dozens of investors I wouldn't have seen otherwise. 2. Since most Pivotal Leaders' companies are in different arenas, there is no issue of competition -- so willingness to share tips/techniques/contacts should be high. The Stanford Biz School Alum group manages a database of inquiries and responses from fellow participants, via e-mail. Seems to be helpful for folks addressing specific challenges.

Although difficult in a "self-directed" network, I don't see much hope for effectiveness without a short list of key, measurable goals. Figure out a couple of meaningful metrics and track them. Cleantech company investment, jobs (FTE) and average compensation (total) should be three of them.

Bring all stakeholders together to lobby for better policy.

outside organizations have not had a significant impact on our firm over the years, rather our collaborations with other firms has been critical

I've noticed throughout my career that ad hoc organizations have the greatest potential for meaningful impact because they do not have an assumed 'mandate to perpetuate' the organization. While I don't have a specific suggestion for the Pivotal Leaders Network at this moment, I do believe that this network of bright people who are connected to other bright people has very high potential for helping the region establish and leverage its advantages.

This is a unique group. But in any organization, at the end of the day, it's in the relationships and networking where the real value emerges.

I have generally been disappointed in organizations in the past. I have found the demands of running a company to be so pervasive that the competition for time left little available for participation in an organization. It has to be compelling and convenient to bring leaders together to commit time and money.

Common shared experience in a non-business environment can be pretty high impact in building lasting relations as well as get meaningful perspectives. Multi-day river trip--I know just the place.

Keep it light and fun....this may be an odd one to start with, but as busy as all of us are, it strikes me that one of the things we may want to do is to make activities attractive on a personal level...in addition to being professionally valuable. I'm on many boards, and sometimes the working environment is stoic and deathly serious. At times that is appropriate, but it doesn't necessarily make one look forward to that activity. As to the serious side of what is offered, be organized and focused in the use of our time, recognize that we may not be able to make all events, and really facilitate the personal connections among this accomplished group. Also, in looking at the talent involved, I would have so much to learn from these individuals. PL could simply facilitate the sharing of knowledge and experiences among our own group.

Society for Organizational Learning's Sustainability Consortium - brought leaders in this space together for deep dialogue (not just meet and greet) to explore and tackle emerging issues, well before they were part of the mainstream conversation. These have been lasting relationships and networks from which to draw upon. No one was in competition with each other and there was no "business" to be gained individually. The dynamics were purely exploratory in critical issues and how to lead the work within our respective organizations.

Northwest Energy Efficiency Council. Strong and direct voice representing the energy eff industry. Recently help to pass the Jobs Act in WA. Ref 52 on the Nov ballot.

created meaningful dialogue and promoted learning that inspired change.

Minimize process; maximize free-flowing conversation around key topics. Example: TechAmerica's CEO forums.

The State of Montana aggressively recruited BME. Their level of commitment created goodwill between us, and as a result good things are happening.

My dad has done several leadership retreats for my businesses -- each was very effective in helping the team take a long view, think strategically and act with greater cohesion. At some point it'd be cool to get folks together to talk about the goal -- what the society looks like that we're trying to evolve to through clean tech; it's economy, cultural attitudes and fixtures, etc. That sort of discussion could spark more long term collaborations in the network.

Networking events, advise, connect, review, PR

Fund promising companies that have true potential to make positive change.

Facilitated leadership forums to share experiences and gain insight

Provided thought leadership, either directly, or by coordinating and focusing the thought leadership of the organization

Question 12: Please describe any additional ideas or opportunities you see.

Actively mentoring CEO/CTO's

Dunno yet. These will emerge.

I appreciate what I have already heard about the direction PL is taking.

I remphasize the need for Pivotal to be compelling in order to get CEO's and executives to commit time to participate.

Pivotal leaders could over time become more involved in directly recommending its members for leadership positions in clean tech companies. Could also provide short tutorials on key aspects of leading a clean tech company to members.

Teach "blue state" leaders to be business smart so that capital and talent leading to high-wage jobs are attracted, not repelled. We're still too politically correct.

This is such a new group - I am looking forward to the group actually getting together in order to understand what this 'resource pool' brings, and then what we could potentially work on together. Possibly significant policy issues?

We have a mobile pizza oven -- let's take Pizza, Peers and Prototypes on the road! (OMSI could be a good first next stop)

Question 16: Please elaborate on what you could contribute to the Pivotal Leaders Network.

Facilities and experience in trade and business organizations A network of unbelievable breadth

We can provide significant help (research support, user facilities, 'first money in' development funding) to Oregon cleantech companies whose technology involves materials science or manufactured devices (electronic, fluidic, etc.).

Deep knowledge of sector and technology.

We're deeply immersed in residential energy efficiency particularly around home performance, so can bring that to bear...

built environment

Our 'business' is providing mentorship to young technology based companies. That positions Sirti with unique and broadbased connections across many sectors, throughout higher education/research and in every aspect of the business plan.

My vocation, conservation, is often an avocation for others. The intentionality with which I approach building my organization may be of value, particularly in view of the white space in which we are currently working (environment, tech, + markets). With connections to regulators, electeds, and philanthropists, I hold an interesting set of relations. I also have 2 wooden drift boats.

As a 20+ year business leader and 15 year 'sustainability' practitioner within large multi-national complex organizations, my area of interests lie in how to shift systems, cultures, organizations at large (throughout the value chain). Collaboration, new styles of leadership, and activating networks for rapid acceleration are key tools. Facilitating the dialogue and engaging key influencers - not always the known entity.

General business knowledge, with strong experience in energy efficiency. Happy to be a sounding board regarding new ideas.

Depending on what the network does or becomes would determine what I could contribute to it.

Would like to explore ways to integrate our networks, including BLCS and CEN, with these efforts.

My background in politics at the local, state, and national level can provide access to partners. We have strong ties to the Dept. of Commerce through Gov. Locke (mentor), and to the White House.

Experiences and items to avoid, starting a new company.

APPENDIX C

The following is a list of open ended responses from survey participants with the corresponding frequency table categories they have been paired with.

Question 4: Question: As you compare your current involvement in the clean technology industry today, where do you aspire to be three years from now?

Leading/advancing clean technology industry through innovation

Either to have built a robust clean tech legal practice or to have joined a clean tech company in a leadership role

National leader in sustainable design, build, operate

Leading the next wave.

Rather than my own aspirations, its probably better to talk about it in terms of where I'd like to see Tanner Creek Energy. If the company meets its goals I'll meet mine. In three years, we would hope that Tanner Creek Energy is one of the most successful and respected energy efficiency and renewable energy solution providers in the NW. Providing leadership in the transition to new technology development and deployment. To achieve this, my hope is that in whatever role I play, I can assist in that transition by proactively supporting commercially viable products and services that are scalable. Examples of this are the deployment of electric vehicles and charging associated, energy management software, micro-hydro and biomass and further development and refinement of existing technology that must be made more economically viable such as small scale nuclear and solar generation

Continuation of my current business, with greater reach to multi-national, influential companies in multiple industries that have a significant impact on climate change, natural resource usage and working with them to effect systemic change towards a planet in equilibrium. Continued expansion of my reach into higher education and working with emerging leaders around the world to insure intergenerational leadership is in place.

Would like to be an engaged participant in a growing and thriving sector in the region. Aspire to contributing in whatever way is highest and best use of my skills, background and connections.

In three years we'd like to have an operational business accelerating widespread clean energy projects via innovations in project finance.

More established, proving out our model

I hope to see my company leading transformations in Clean Tech through the development and commercialization of advanced energy storage technologies

Make technologies more available to everyone

For our technologies to be prevalent in their respective industries.

My goal is to continue to bolster our ability, via publications, databases, events, and other activities, to help a range of players move forward aggressively with their clean-tech initiatives, and to identify real opportunity vs. hype. One of our newest initiatives, The U.S. Clean Energy Leadership Index, aims to do that for economic development organizations, utilities, corporates, and other audiences. The index ranks all 50 states

on their clean-energy activities in technology, policy, and capital deployment and initiatives.

Running a company that is just about to turn cash flow positive, marketing ultra efficient, unique vehicles.

My ideal scenario has me involved in leading a high growth, private sector clean energy technology company with a solid go-to-market strategy. I especially love the building of successful management teams and the activities associated with raising capital.

To be a growing profitable vendor of Smart Energy Storage systems to the Utility industry

Profitable with at least \$5M in revenues.

Specific goals to increase environmental efficiency of current company

Develop one major project in the NW each year Develop 1000 MW per year in North America Have the solar development group fully functioning

\$80-100M/year in micro/nano sponsored research in Oregon, about two-thirds of which will be directly applicable to clean tech (energy efficiency, energy and water efficiency. Early stage and VC funds raised by spinout companies from these efforts will be in the top quartile nationally (per capital basis).

Driving large impact across the company and for our customers.

Strategic intent is to drive the operationalizing of environmental markets around water at scale.

Today, our involvement is on a local, regional, and select federal basis. We would expect in 3 yrs to have a coast to coast voice on clean energy tech. We would also expect that today there is much talk about clean tech, and we would expect that in 3 years action and implementation of clean technologies nationally will be clear and not speculative.

At full production with two facilities, integrating upstream to reduce feedstock risks. Many more MWs installed

Increasing profitability in private sector

I want to see the trends we are initiating beginning to drive fundamental change in the way trillion dollar basic industries do business.

Leading a highly profitable business

a company that is just about to turn cash flow positive, marketing ultra efficient, unique vehicles.

profitable vendor of Smart Energy Storage systems to the Utility industry

full production

engaged participant in a growing and thriving sector in the region

Start/continue a clean technology business

Running a clean tech company.

Either to have built a robust clean tech legal practice or to have joined a clean tech company in a leadership role

Running a company that is just about to turn cash flow positive, marketing ultra efficient, unique vehicles.

To be a growing profitable vendor of Smart Energy Storage systems to the Utility industry

Operating net zero

Net zero and regenerative buildings

I'd like to be well on the way to completion of my first set of clean tech project goals - rebooting transportation and getting my commercial redevelopment to net zero.

Passing clean technology legislation

Passing legislation that moves the needle on clean energy investment in Oregon and sets a national standard.

Undefined: make some type of an environmental, social, or economic impact

I do not consider myself in the clean tech industry. That said, I aspire to be creating impact (financially, socially, environmentally) in whatever i am doing 3 years from now.

Fundamentally change the way large businesses do business

I want to see the trends we are initiating beginning to drive fundamental change in the way trillion dollar basic industries do business.

Question 5: What are three things that the Pivotal Leaders Network can do to bring value to your efforts to advance your business?

Networking with fellow leaders

Connections to myriad aspects of the clean tech/clean energy cluster

Help Pivotal Leaders' leverage each others' expertise and contacts for specific needs

Create informal peer network in the NW

Tactical networking opportunities with high signal to noise.

Provide opportunities to really get to know the other Pivotal Leaders.

A mutual benefit society, so to speak, to help each other advance our individual goals whether they be in the public or private sector through collaboration, networking.

Collaboration among companies in the network

Sharing experiences in the market through networking

Networking and providing a collegial and collaborative environment

Access to other good people in the field.

Inclusion in networks of leaders engaged in this work

Collaboration and partnership - there's plenty of work in this space to go around!

Network with others.

Network with those that have shared goals in the clean economy

Access to other entrepreneurs

Network

Networking

Access to partnerships

One unified voice

A group that has a voice that is recognizable and appreciated.

A group with true leaders in this space.

Elevate awareness of the business and the solution we're providing

Expertise sharing within pivotal leaders

Help organize idea round tables

Mentor PNW cleantech entrepreneurs and management teams

Provide technical support as needed.

Facilitate ways that Pivotal leaders can mutually support one another's professional, business and personal objectives.

access to experts in areas where startups lack: operations (scale) experience, fundraising experience to navigate the shifting capital markets (including non traditional finance

government grants, private equity, exotic instruments, debt, etc.).

Provide access to fellow leaders that might seek legal services

Outreach to universities

Collaborate to exploit university capabilities more effectively than other regions do

Better establishing connections between academic development of technology and business deployment of commercially viable technology

Influence policy

Help identify policies needed to support the clean economy

Policy support in legislatures/ governments

Increase awareness of need for coordinated efforts across "silos" on both policy and economic development issues.

Educate government and regulators regarding the positive benefits of clean energy

Educate investors

Get investors to look at Pivotal Leaders' companies and actually place some bets

Increase awareness in investment community of exciting opportunities in region and qualified pool of management and entrepreneurial talent.

Clean tech think tank

Organize the Pivotal Leaders around having a voice in establishing strategy and policy for OR and WA in establishing and growing a global leadership position in the clean energy economy.

leveraging collective "bargaining" power to influence and change issues in the Pacific NW Sharing best practices

A sounding board for new ideas, products

A great inside information source on the NW clean tech sector. Understanding and predicting the trends just ahead of the competition will be critical for success.

Help me figure out/develop needed financial vehicles.

Draw out learned experiences from others

Vet my narrative/messaging.

Showcase success stories for motivation

peer support and dialogue

Develop the network as a resource for specific sources of expertise

Calibration and resource network

Increase integration and participation of broader network of qualified business leaders in building clean energy economy in region.

Facilitating opportunities to review technologies, and particularly the underlying economics

Facilitate financial opportunities

Help me refine "the pitch" to foundations/early market investors/lenders.
market regional expertise outside of the region

Access to debt financing.

Debt financing

Bring in leaders from large corporations to help influence their investment and direction in clean tech technologies

Help find affordable capital

Extend network to other companies

Partnering with other companies in order to offer complete market solutions

Introductions to companies ready to adopt new business principles

Access to capital

Access to capital

potential access to capital (we've never taken in outside capital, but might need/want in the future),

Provide visibility in the community

provide visibility of myself to the clean tech community

Attract favorable attention and early stage capital to the region

PR opportunities.

Educate the public regarding the positive benefits of clean energy

Highlight the importance of Clean Tech enterprises on the economy and society

Greater recognition of commercialization of solar, Higher PacificNW visibility for SunPower

Question 7: What should the region's top three priorities be relative to the economic opportunity for clean technology?

Policy change

Much stronger policy driven initiatives for renewable energy.

Push regional policy for a larger consistent marketplace for which to do business

Helping to move policy in the right direction through active participation in the public sector process.

Establishing durable policies that promote clean technology

Real incentives from government to accelerate investment

Expand and implement State Renewable Portfolio Standards

Boost/stabilize key levers like Oregon's BETC, which helps both company investments and customer demand.

State and local govt participation in green projects

Tax incentives for green technology deployment

Regulatory leadership

Coordinate local government activities in support of clean tech to allow for more regional collaboration between companies

Carbon tax

Regularly alignment on outcomes: what we intend to bring about will then drive the melting away of outmoded procedures and drive prioritized investment.
Tax policy - an onerous sales tax makes this region uncompetitive.
Positive financial incentives to adopt clean tech
Incentivize public and private enterprises to hire 'green' talent
Regulatory framework revision –
Matching strong policy and subsidy supports with regular review of how the supports are working in the marketplace

Energy

Efficiency is Energy
Smart Grid
BioEnergy
Green buildings and energy efficiency.
energy efficiency/smart grid distributed wastewater green buildings
Leveraging all tangible and intellectual/human assets to solve global grand challenges in the energy/clean technology space.
Enable acceleration of green power in the state
Smart grid
Alternative energy sources
hydropower in the NW. Feed-in Tariffs would create certainty and bankable contracts for renewable energy companies
green building/efficiency improvements
Better public transportation
Petroleum alternatives
Transportation electrification
transportation

Investment

Figure out ways to mobilize funding
Invest
Invest
Invest
Attract capital
Access to capital
More investment activity, more harnessing cleantech+IT to leverage MSFT/Amzn talent pool, more networking.
Increasing public and private investment funds for bringing clean technology to scale in region and supporting promising companies.

Regional Empire

Create best investment climate in the country for clean tech using combination of tax incentives, regulatory streamlining or support, leveraging private capital and the like.
Get clear on why a company should create jobs here vs in China or Alabama, and which kinds of jobs should be here.
Increasing regional focus on promising clean energy economic opportunities and promoting integration between sectors
Encourage large industries with NW focus to get more involved in clean tech industries and R&D

Use this "bully pulpit" to advocate for the clean tech sector in general as it pertains to future economic and employment growth in the region.

Cross-boundary agreement on making this region the world's green epicenter.
market regional expertise outside of region price fuel a true cost seek divergent partnerships private/private as well PPP
Serving global markets

Procedural Innovation

Build transmission

Streamline siting

Build and recruit the world's best management teams

Real-world technology deployment test beds - electric utilities, etc.

local food production optimization

Standard Offer Contracts - renewable power is almost a non-starter as a result of cheap.

Improve business opportunities

Strive to create opportunities that don't require public policy to move forward.

If looking for manufacturing jobs, figure out how to make that pencil for the companies involved.

Focusing more on a favorable overall business environment (tax, regulatory, workforce) than raw subsidies

Creating the most advantageous environment for starting, growing and running your clean technology business.

Marketing to investors that green businesses here will be encouraged to succeed.

Build a brand. Quit sitting back on our "were hip" laurels and compete for top of mind

Vision of a (for)Evergreen Washington Roadmap to get their Messaging campaign

Develop venture strategy.

Outreach and education

Education, education, education and opportunity, opportunity, opportunity.

Access to talent

Air and water quality

Clean up horrible air and water quality in region

Water re-use

Streamline expertise

Consolidate efforts in CT to a few advocate organizations

Pick our strongest sectors and focus/hone our efforts.

Focus on sub-set of clean tech business area to concentrate expertise and available resources

Universities and research innovation

Advocate for universities and research institutions - make them stronger

Focused support for higher education--both technology development and highly skilled workforce

Regional clean tech innovation center(s) - universities, tech companies, etc.

Question 8: Our sponsors are committed to the Pivotal Leaders Network objectives. What can they do to help create value for you?

Advocates of the industry

Be early customers/beta customers of Pivotal Leaders' products. .
Leverage media contacts to get our perspectives popularized
Be active participants in the network.
Set a handful of mutual goals we can work on together.
Commit to deploying the technology of the companies developing green solutions in the region.
discount to Pivotal Leader companies.
Commit to fleet vehicle purchases of Arcimoto vehicles
Policy advocacy
Early adopter customers

Unsure/Network is too new

Nothing occurs
Need to understand the sponsorship model better (and the sponsors intentions).
Unsure
TBD
Unsure
The network is so new
Not sure

Network opportunities

Support the activation of the network; sponsor discussion groups, etc.
Make themselves available for networking
Networking opportunities with potential customers and financing.
better integration with our Business Leaders for Climate Solutions/other networks
Help bring leaders together

Connect with market opportunities

Continue to provide networking opportunities and visibility
better connect with possible market opportunities.
Business leadership needs to focus in on those technologies that have broad commercial application and put effort behind supporting those first and foremost.

Technical support

Provide technical support/testing/etc. at no cost.
Legal services

Improve economic climate

Get advocacy aligned with business and job creation
Advocate for sound economic/fiscal policies that encourage business and capital formation

Other

Don't fall into/be coopted by the politically correct/soft-headed "progressive" trap.
do not overly commercialize this group.

Advocate effectively for public (federal and state) funding of higher education

Question 9: Please list three words you would use to describe the Pivotal Leaders Network.

Word Group: Active

Action
Active
active
Engaged
engaged
Engaging
Dynamic
dynamic
Dynamic

Word Group: Emerging

Emergent
Nascent
nascent
Nascent
Young
new
Next
Catalyst
buzz

Word Group: Innovative

Innovative
Innovative
Innovative
Innovative
Innovators
Visionary
Aspiring
Inspired

Word Group: potential

Possibilities
potential
Risktakers
High-Potential
Opportunity
Promising
High-leverage
Untapped

Word group: practical

Practical

Professional
Seminal
good idea
smart
Applied
Objective

Word Group: unique

Interesting
Diverse
Unique
Bold
regional

Word Group: Network

Collegial
Community
Connected
connections
Network
Networking

Word Group: Leadership

Leaders
Leadership
Leading
Mission-driven
Motivated

Word Group: Progressive

Forward thinking
forward-thinkers
Forward-thinking

Word Group: Knowledge

knowledge
Knowledge
Talented

Word Group: Uncertainty

uncertain
unclear
Unknown

Word Group: Excitement

Optimistic
Passion

Word Group: Entrepreneurial

Entrepreneurial
Entrepreneurial

Word Group: Green

Cleantech
Green

Question 10: Pivotal Leaders Network is interested in learning from past experiences you've had with organizations that significantly impacted your career and/or business. What did they do that you think Pivotal Leaders should do?

Agent of change- unstructured

I've noticed throughout my career that ad hoc organizations have the greatest potential for meaningful impact because they do not have an assumed 'mandate to perpetuate' the organization.

Society for Organizational Learning's Sustainability Consortium - brought leaders in this space together for deep dialogue (not just meet and greet) to explore and tackle emerging issues, well before they were part of the mainstream conversation. These have been lasting relationships and networks from which to draw upon. No one was in competition with each other and there was no "business" to be gained individually. The dynamics were purely exploratory in critical issues and how to lead the work within our respective organizations.

Northwest Energy Efficiency Council. Strong and direct voice representing the energy efficiency industry. Recently help to pass the Jobs Act in WA. Ref 52 on the Nov ballot. created meaningful dialogue and promoted learning that inspired change.

Minimize process; maximize free-flowing conversation around key topics. Example: TechAmerica's CEO forums.

Networking

Closest I can think of is American Leadership Forum (ALF). Creates a class of leaders and then a network of former alums and ongoing opportunities to network within the group.

outside organizations have not had a significant impact on our firm over the years, rather our collaborations with other firms has been critical

But in any organization, at the end of the day, it's in the relationships and networking where the real value emerges.

Networking events, advise, connect, review, PR

Strong Leadership

Facilitated leadership forums to share experiences and gain insight

Provided thought leadership, either directly, or by coordinating and focusing the thought leadership of the organization

Identified Goals

Although difficult in a "self-directed" network, I don't see much hope for effectiveness without a short list of key, measurable goals. Figure out a couple of meaningful metrics and track them. Cleantech company investment, jobs (FTE) and average compensation (total) should be three of them.

My dad has done several leadership retreats for my businesses -- each was very effective in helping the team take a long view, think strategically and act with greater cohesion. At some point it'd be cool to get folks together to talk about the goal -- what the society looks like that we're trying to evolve to through clean tech; it's economy, cultural attitudes and fixtures, etc. That sort of discussion could spark more long term collaborations in the network.

Awareness

Get noticed, period. Our pivotal leaders need help getting q voice to the public and elected as well

Clean Tech Open opened up access to dozens of investors I wouldn't have seen otherwise.

Build interpersonal relationships

Common shared experience in a non-business environment can be pretty high impact in building lasting relations as well as get meaningful perspectives. Multi-day river trip--I know just the place.

Keep it light and fun....this may be an odd one to start with, but as busy as all of us are, it strikes me that one of the things we may want to do is to make activities attractive on a personal level...in addition to being professionally valuable. I'm on many boards, and sometimes the working environment is stoic and deathly serious. At times that is appropriate, but it doesn't necessarily make one look forward to that activity.

Information sharing

Since most Pivotal Leaders' companies are in different arenas, there is no issue of competition -- so willingness to share tips/techniques/contacts should be high. The Stanford Biz School Alum group manages a database of inquiries and responses from fellow participants, via e-mail. Seems to be helpful for folks addressing specific challenges.

Also, in looking at the talent involved, I would have so much to learn from these individuals. PL could simply facilitate the sharing of knowledge and experiences among our own group.

Efficient use of time

I have generally been disappointed in organizations in the past. I have found the demands of running a company to be so pervasive that the competition for time left little available for participating in an organization. It has to be compelling and convenient to bring leaders together to commit time and money.

As to the serious side of what is offered, be organized and focused in the use of our time, recognize that we may not be able to make all events, and really facilitate the personal connections among this accomplished group.

Policy Agenda

Bring all stakeholders together to lobby for better policy.

Minority inclusion

The State of Montana aggressively recruited BME. Their level of commitment created goodwill between us, and as a result good things are happening.

Funding

Fund promising companies that have true potential to make positive change.