STATE OF MICHIGAN

BEFORE THE MICHIGAN PUBLIC SERVICE COMMISSION

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| In the matter, on the Commission's own motion, regarding the regulatory reviews, revisions, determinations, and/or approvals necessary for **CONSUMERS ENERGY COMPANY** to fully comply with Public Act 295 of 2008, as amended by Public Act 342 of 2016. | ) | Case No. U-20875 |

At the March 17, 2022 meeting of the Michigan Public Service Commission in Lansing, Michigan.

PRESENT: Hon. Daniel C. Scripps, Chair
Hon. Tremaine L. Phillips, Commissioner
Hon. Katherine L. Peretick, Commissioner

**ORDER APPROVING SETTLEMENT AGREEMENT**

On August 2, 2021, Consumers Energy Company (Consumers) filed an application, with supporting testimony and exhibits, requesting approval of its energy waste reduction plan for 2022 through 2025 and other related relief.

A prehearing conference was held on September 8, 2021, before Administrative Law Judge Sharon L. Feldman (ALJ). At the prehearing conference, the ALJ granted the petitions to intervene filed by the Natural Resources Defense Council, the National Housing Trust, the Ecology Center, the Sierra Club, and the Association of Businesses Advocating Tariff Equity. Additionally, the ALJ recognized the intervention status of the Michigan Department of Attorney General. Consumers and the Commission Staff also participated in the proceeding. Subsequently, the parties submitted a settlement agreement resolving all issues in the case.

The Commission has reviewed the settlement agreement and finds that the public interest is adequately represented by the parties who entered into the settlement agreement. The Commission further finds that the settlement agreement is in the public interest, represents a fair and reasonable resolution of the proceeding, and should be approved.

THEREFORE, IT IS ORDERED that:

A. The settlement agreement, attached as Exhibit A, is approved.

B. Within 30 days of the issuance of this order, Consumers Energy Company shall file tariff sheets substantially similar to those attached to the settlement agreement.

The Commission reserves jurisdiction and may issue further orders as necessary.

Any party desiring to appeal this order must do so in the appropriate court within 30 days after issuance and notice of this order, pursuant to MCL 462.26. To comply with the Michigan Rules of Court's requirement to notify the Commission of an appeal, appellants shall send required notices to both the Commission's Executive Secretary and to the Commission's Legal Counsel. Electronic notifications should be sent to the Executive Secretary at mpscedockets@michigan.gov and to the Michigan Department of the Attorney General – Public Service Division at pungp1@michigan.gov. In lieu of electronic submissions, paper copies of such notifications may be sent to the Executive Secretary and the Attorney General – Public Service Division at 7109 W. Saginaw Hwy., Lansing, MI 48917.

MICHIGAN PUBLIC SERVICE COMMISSION

Daniel C. Scripps, Chair

Tremaine L. Phillips, Commissioner

Katherine L. Peretick, Commissioner

By its action of March 17, 2022.

Lisa Felice, Executive Secretary

**EXHIBIT A**

STATE OF MICHIGAN

BEFORE THE MICHIGAN PUBLIC SERVICE COMMISSION

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|---|---|---|
| In the matter, on the Commission's own motion, regarding the regulatory reviews, revisions, determinations, and/or approvals necessary for **CONSUMERS ENERGY COMPANY** to fully comply with Public Act 295 of 2008, as amended by Public Act 342 of 2016 | ) | Case No. U-20875 |

## SETTLEMENT AGREEMENT

Pursuant to MCL 24.278 and Rule 431 of the Michigan Public Service Commission's ("MPSC" or the "Commission") Rules of Practice and Procedure, the undersigned parties agree as follows:

WHEREAS, on August 2, 2021, Consumers Energy Company ("Consumers Energy" or the "Company") filed an Application with supporting testimony and exhibits requesting approval of its 2022-2025 Energy Waste Reduction ("EWR") Plan pursuant to 2008 PA 295, as amended by 2016 PA 342, MCL 460.1001 et seq. ("Act 295"), and as directed by the MPSC.

WHEREAS, the initial prehearing conference in this proceeding was held on September 8, 2021. The parties to the case are Consumers Energy, the Commission Staff, the Natural Resources Defense Council ("NRDC"), National Housing Trust ("NHT"), the Ecology Center, Sierra Club, the Association of Businesses Advocating Tariff Equity ("ABATE"), and the Department of Attorney General.

NOW THEREFORE, for purposes of settlement of Case No. U-20875, the undersigned parties agree as follows:

1. The parties agree that the Company's filed 2022-2025 EWR Plan should be approved as modified in this Settlement Agreement.

2. The parties agree that Consumers Energy will recover the electric and natural gas EWR Plan costs via the surcharges set forth on Attachment A to this Settlement Agreement. These EWR surcharges are the levelized surcharges for each customer class. The full surcharges (the sum of the approved plan component plus the approved performance incentive component) are set forth on Attachment A. The surcharges set forth on Attachment A are based on an assumed implementation in April 2022 customer bills. If the surcharges are implemented in May 2022 or later, they would have to be modified accordingly. The parties also agree, beginning in 2023, to recover electric business EWR Plan costs via the ten-tier surcharge structure, inclusive of both primary and secondary customers, provided in Attachment A.

3. The parties agree that, per the filed plan, the energy savings targets for the Company will be based on the prior year weather-normalized sales methodology and will include a downward adjustment in gas energy savings targets to remove gas sales to electric generation customers. Subject to audit results, the natural gas targets for 2022, 2023, 2024, and 2025 are 2,130,573 Mcf, 2,134,856 Mcf, 2,135,389 Mcf, and 2,137,370 Mcf, respectively, as shown in Attachment D.

4. The parties agree that Consumers Energy should be granted MPSC approval to continue the accounting practices previously authorized by the Commission in its approval of the Company's original Energy Optimization Plan, and the authority to roll-over any unused funds into the next plan year funding. Unused funds are to be rolled over and remain within the class to which they were allocated.

5. The Company shall continue to analyze and demonstrate the cost effectiveness level of each individual EWR program in its annual reconciliation proceedings throughout the Plan period.

6. The parties agree the Company can invest in its EWR portfolio up to the levels outlined in Attachment D of this Settlement Agreement and that the Company should be granted authority to continue to reallocate up to 30% of the overall EWR budget by and within each class to ensure program flexibility for the more popular programs. With the exception of the multifamily program administered as part of the business class, which will not have such reallocation flexibility, reallocation will occur within the same service class. This reallocation was approved in Case Nos. U-16412, U-16670, U-17351, U-17771, U-18261, and U-20372 and is authorized by Section 71(4)(h) of Public Act 342 of 2016. To help ensure continuity of the EWR program portfolio in the market and delivery of the increased energy savings targets, if cost effective, the Company may also increase annual investment above the annual amounts in Attachment D by up to 6% of electric and 10% of gas investment.

7. *Electric Income Qualified Investment.* As identified in Attachment D, the Company agrees to the following Income Qualified Program electric investment levels.

a. *Single family.* $9.6 million in 2022 and 2023, $10.6 million in 2024, and $11.0 million in 2025. This includes incremental investment to the Company's EWR Plan as filed of $2.0 million in 2022, $1.7 million in 2023, $2.7 million in 2024, and $2.8 million 2025.

b. *Multifamily.* $9.4 million in 2022, $10.7 million in 2023, $11.8 million in 2024, and $12.6 million in 2025. This includes incremental investment to the Company's EWR Plan as filed of $0.7 million in 2022, $2.1 million in 2023, $3.3 million in 2024, and $4.1 million in 2025.

8. *Gas Income Qualified (IQ) Investment.* As identified in Attachment D, the Company agrees to as the following Income Qualified Program gas investment levels.

a. *Single family.* $15.75 million in 2022, $17.5 million in 2023, $20 million in 2024, and $22 million in 2025. This includes incremental investment to the Company's EWR Plan as filed of $1.8 million in 2022, $3.5 million in 2023, $5.9 million in 2024, and $7.8 million in 2025.

b. *Multifamily*. $7.8 million in 2022, $9 million in 2023, $10.5 million in 2024, and $10.5 million in 2025. This includes incremental investment to the Company's EWR Plan as filed of $3.7 million in 2022, $4.9 million in 2023, $6.4 million in 2024, and $6.4 million in 2025.

c. The parties agree that the Income Qualified program gas incremental investment noted above shall not be directed toward non-emergency new gas equipment (furnaces, boilers, water heaters) beyond what is already included in the Company's EWR Plan as filed. This does not apply to emergency gas equipment replacements where the existing equipment has failed, is at end of life, or other health and safety replacement reasons, nor to any non-gas-fired equipment measures.

9. *Net-to Gross.* The parties agree that the Net-to-Gross ("NTG") of 0.92 will apply for most programs and 1.00 will apply for the Income Qualified program. The Company will apply a 0.4 NTG ratio for Standard and 0.5 for Specialty (such as candelabra and globe) LEDs in 2022 and 0.35 NTG for Standard and 0.44 for Specialty LEDs in 2023. Any updated or adjusted NTG values for lighting for program years 2024 and 2025 will be included in the Company's next EWR Plan filing.

10. *Supplier Diversity*. Consumers Energy will continue its practice of providing an opportunity for non-profit organizations, Michigan-based business enterprises, and minority,

women, veteran, service-disabled veteran, and LGBT+–owned diverse business enterprises to compete on an equal basis for materials and services utilized by the Company in connection with implementing its EWR Plan. This practice does not diminish, in any way, the objective of Consumers Energy to acquire materials and services on the most economic basis available, considering factors such as price, quality, service reliability, and timely delivery, and encouraging all qualified suppliers and contractors to compete for the Company's business. Consumers Energy agrees to consider non-profit organizations or businesses that have demonstrated experience serving the affordable Multifamily sector and have responded to a request for proposal related to the Company's Income Qualified Multifamily program. Consumers Energy agrees to track and report in EWR annual reconciliations the number of such organizations and business enterprises utilized by the Company in connection with implementing its EWR Plan. All data collection of customers will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

11. *Performance Incentive.* The parties agree that the metrics associated with the Performance Incentive Mechanism ("PIM") for both the electric and gas programs are provided on Attachment C of this Settlement Agreement. The metrics under the PIM will continue to be based upon both lifetime savings targets and supplemental metrics, and eligibility of the financial incentive is determined first by demonstrating achievement of the annual incremental energy savings thresholds established in Section 75 of Act 295, as amended by Public Act 342 of 2016. MCL 460.1075. The parties are not prohibited from proposing changes to the PIM in future EWR proceedings.

12. *Home Energy Reports.* The parties agree that energy savings from the Company's residential Home Energy Report Program will not account for more than 20% of the total residential electric savings and 15% of the total residential gas savings in 2022 and 2023.

13. *All-Electric Home Pilot.* Consumers Energy agrees to continue its Super-Efficient, All-Electric New Construction Pilot designed to help identify additional residential electric savings opportunities from this sector. The number of homes to be included in the pilot will be of sufficient quantity to demonstrate success with multi-unit production at reasonable cost rather than just a limited number of expensive, custom homes. The pilot will include (a) at least net zero ready but can be net zero photovoltaic (PV) added; (b) cold climate heat pumps; (c) monitoring and evaluation of factors such as energy bill impacts, heat pump performance, customer comfort, builder barriers, and cost-effectiveness; and (d) documentation of results through case studies. The pilot will include promotion of healthy building materials as described in paragraph 19. The Company agrees to include pilot reporting in the annual EWR report.

14. *Multifamily One-Stop Shop Design*. Consumers Energy will utilize the multifamily income-qualified one-stop shop approach and program design elements set forth on Attachment B to this Settlement Agreement.

15. *Pilot Investment.* The parties agree that Consumers Energy's pilot spending cap will remain at the 6% authorized in Case U-20372 to account for the health and safety pilot (as discussed in paragraph 16) and other potential pilot initiatives throughout the year. The health and safety pilot will be accounted for in the pilot budget but administered as part of the income qualified and multifamily income qualified programs.

16. *Income Qualified Health and Safety and Arrears Pilot.* Consumers Energy agrees to continue the Income Qualified Health and Safety pilot per the Settlement Agreement detailed

in MPSC Case No. U-20372, allocating $1,500,000 (budget allocated 80% electric and 20% gas) to single family and $350,000 to multifamily (budget allocated 80% electric and 20% gas) in 2022 and 2023. This pilot will be supported by pilot investment and administered through the Income Qualified single and multifamily programs to ensure integrated delivery of services to participants.

a. The pilot will involve the promotion of healthy building materials, as discussed in paragraphs 19 and 20.

b. The pilot will include an energy assistance arrears component to promote participation by both single and multifamily income-qualified customers who are in arrears, which can include CARE, HHC, and SER recipients.

c. The Company agrees to track the following pilot data points: number of customers served (including single family and multifamily breakdowns), deferrals identified, deferrals resolved, disconnections, health impacts (aggregated air quality data as identified by health provider organizations and participant surveys), total energy efficiency measures installed (type, number, and investment), average number of measures installed per customer, repairs completed, and total energy savings. For the arrears component, Consumers Energy also agrees to track: number of customers that received outreach regarding the arrears initiative and number of customers that received EWR services through the arrears initiative. The Company will report on this data consistent with the reporting schedule described in paragraph 28 of this agreement, except that the Company will begin its reporting for this pilot in the 2022 annual reconciliation filing.

d. Beginning in 2023, the Company will add tracking and reporting of the trade ally/community entity performing the Health and Safety pilot work and will provide aggregate data at the zip code level. Consumers Energy also agrees to provide a mid-year pilot update to interested parties.

e. The Company agrees to work with a third-party evaluator to develop and implement a plan for pilot evaluation including analysis of items such as bill impact, disconnections, impact on arrears, and health impacts. Before the Company implements any such plan, Consumers Energy will convene a meeting with the parties to this agreement and the third-party evaluator to discuss and provide input on the plan. The Company will include the final evaluation report in its EWR Reconciliation filing and will present final evaluation results and findings to the EWR Low Income Workgroup

f. All customer data collection, storage, and reporting will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

17. *Geographic Targeting*. The parties agree that in 2022 Consumers Energy will initiate the research studies identified below to support development of an income-qualified geotargeting protocol.

a. A low income needs assessment ("LINA") study to identify historic participation and coverage of the Company's income qualified programs, characterize low-income areas using available datasets, and develop scenarios for ranking geographies based on high need criteria or for optimizing specific

benefits to inform future prioritization of services. All data collection of customers will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

i. The parties agree that Consumer Energy will convene a meeting with interested parties to develop LINA study prioritization scenarios by July 31, 2022.

ii. The parties agree that the Company will utilize the LINA (including prioritization scenarios) to identify opportunities and program strategies for increasing participation by single and multifamily properties in areas identified as having high numbers of economically vulnerable households, electrically heated properties, and rented units that may be historically underserved.

b. The parties agree that Consumers Energy will initiate a follow-up research effort utilizing the LINA research to develop a protocol and implementation strategy for future geographic targeting initiatives designed to increase vulnerable and/or underserved low income customers' participation in income qualified single and multi-family programs through geographically and programmatically targeted approaches, ensure availability and promotion of air sealing and insulation measures by partner agencies and contractors, and increase trade ally awareness regarding the identification of health and safety deferrals. The Company agrees to incorporate the targeting protocol in the development of its next EWR Plan filing.

18. *Income Qualified Flint Initiative*. The Company agrees to invest $1 million between 2023 and 2024 to support an Income Qualified program targeted initiative in and around Flint to identify and assess the impact of a geographically targeted approach to the delivery of EWR services. The initiative aims to find and provide EWR intervention to economically vulnerable customers including those in arrears (which can include CARE, HHC, and SER recipients), struggling to pay utility bills, and at risk of deferral due to health and safety concerns. The initiative will focus on expanding existing efforts with community agencies, energy assistance coordination, outreach to income-qualified participants who recently installed emergency equipment, education and awareness efforts, trade ally education and engagement, and other targeted approaches.

a. Consumers Energy can use this $1 million in any of the following zip codes in Flint: 48502, 48503, 48504, 48505, 48506, and 48507; however, Consumers Energy will prioritize outreach to zip code 48505, followed by 48503 and then 48502, and finally by 48507, 40504, and 48506.

b. Consumers Energy will meet with interested parties by June 30, 2022 for input into project design. The meeting will be open to the parties to this agreement as well as to other stakeholders, including but not limited to Consumers Energy's customers, neighborhood associations, partner agencies, and contractors in Flint. During this meeting, the Company will provide a draft project outline which will include information regarding: (1) priority outreach targeting; (2) how Consumers Energy identified the areas it is proposing to target; (3) how many households Consumers Energy hopes to target within zip codes 48503, 48505, and 48502; (4) how Consumers Energy proposes to utilize its

investments in those target areas; (5) data collection and tracking considerations; and (6) incorporation of stakeholder input.

c. The Company agrees to work with a third-party evaluator to develop and implement a plan for initiative evaluation including analysis of items such as bill impact, disconnections, impact on arrears, and health impacts. Before the Company implements any such plan, Consumers Energy will convene a meeting with the parties to this agreement and the third-party evaluator to discuss and provide input on the plan. The Company will include the final evaluation report in its 2024 EWR Reconciliation filing and will present final evaluation results and findings to the EWR Low Income Workgroup.

d. The Company will utilize the LINA research and 2021 program data to inform the project design described in paragraph 18(b) and to develop customer participation, trade ally, and market potential data for use in identifying initiative targets and scope.

e. The Company will schedule a meeting with stakeholders in Q4 2022 to present its implementation plan and provide stakeholders an opportunity to review final project plans prior to implementation.

f. The Company will implement the Flint initiative no later than January 1, 2023. The intended goals of the Flint Initiative include, but are not limited to: (1) increasing participation in Consumers Energy's Income Qualified single family and multifamily programs in the targeted communities to support bill reduction, health, safety, and comfort benefits to participating households; (2) expanding partner agency and/or contractor efforts to install air sealing and insulation; (3)

ensuring energy auditors working in Flint are provided education on identifying health and safety hazards such as wiring issues, mold, lead, and asbestos and are communicating the presence and impact of the hazards to the occupant; and (4) supporting partner agencies and/or contractors working in Flint in identifying place-based, or other, opportunities to leverage funding from other federal, state, and/or private sources.

g. The Company agrees to track and report the data items listed in paragraph 16(c) of this agreement (Income Qualified Health and Safety Pilot). The Company will report on this data consistent with the reporting scheduled described in paragraph 28.

h. All customer data collection, storage and reporting will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

19. *Healthy Building Materials.* The parties agree that Consumers Energy will provide training and education on the use of healthy insulation and air-sealing materials for contractors. Specifically, Consumers will refer Income Qualified and Home Performance w/Energy Star

program energy auditors to the EEFA Guide to Healthier Materials report[1] and the Blue Green Alliance Building Clean Guide[2] and will encourage use of:

a. Healthy insulation materials
    i. Reduce use of spray foam insulation, polystyrene or polyisocyanurate, and mineral wool bats and boards; and
    ii. Prioritize healthier alternatives, including cellulose based or fiberglass insulation;
b. Healthy air sealant materials
    i. Reduce use of polyurethane and modified polymer sealants; and
    ii. Prioritize healthier alternatives, including acrylic sealants and noncombustible sodium silicate.

20. *Building Materials Tracking.* Beginning in the 4th quarter of 2022 or no later than January 1, 2023, Consumers Energy will begin to track the insulation and air sealant materials used in the Income Qualified program and Health and Safety Pilot. All data collection of customers will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate. Beginning with the Company's 2023 EWR Reconciliation, the Company will report in aggregate, the type of air sealing and insulation materials and number of healthy materials projects in the single and multifamily income qualified programs and health and safety pilot.

[1] Available at https://assets.ctfassets.net/ntcn17ss1ow9/3Bw3JFqYHgI7xWcvb7unwN/a17352bc9c1162b32729ed866ed98705/NRDC-3084_Guide_to_Healthier_Retrofit_Hi-res_smaller.pdf.
[2] Available at https://buildingclean.org/.

21. *Workforce Development.* The parties agree that Consumers Energy will implement a workforce development initiative to promote contractor diversity and certifications that could include healthy homes and/or Building Performance Institute ("BPI") certification. This initiative may include identifying assistance (funding) for certifications and training, promoting practices to increase contractor diversity, promoting Healthy Home and BPI certification, and reviewing current practices and workforce development efforts to identify and address barriers to success. The Company will provide workforce development updates in EWR annual reconciliations and a mid-year update to the Low Income EWR Workgroup

22. *Customer Rebate and Promotion Options.* The parties agree that Consumers Energy will allow customers who participate in EWR programs or pilot programs the option to receive incentive payments through bill credits, gift card, or a gift of energy as an alternative to receiving incentive payments through a paper check.

23. *Measure Adoption.* The parties agree the Company will continue to support efforts to increase adoption of major electric heat measures including heat pumps, air sealing, and insulation upgrades in electrically heated single and multifamily buildings. The Company agrees to share the status of these efforts as part of the mid-year status update and annual Reconciliation reporting outlined in paragraph 28.

24. *Refrigerant Pilot.* The parties agree the Company will continue its refrigerant replacement pilot targeted to restaurants and will expand the pilot to include grocery and other commercial customers. The pilot will be designed to assess energy savings opportunities from leak detection and repairs as well as refrigerant replacement, barriers to participation, and cost of projects. The Company will include pilot status and key findings in its annual reconciliation filings.

25. *Strategic Energy Management.* The parties agree the Company will continue development of its Industrial Energy Management ("IEM") component of the business solutions program, including reviewing best practices and developing a strategic plan for incorporating additional elements of a formal Strategic Energy Management ("SEM") program into the IEM initiative. The Company also agrees to report on IEM/SEM activities as a component of the business solutions program in the EWR Reconciliation filing. Reporting shall minimally include number of participants, incentives, total investment, annual savings, and lifetime savings. All data collection of customers will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

26. *On Bill Payment Pilot.* The parties agree the Company will expand the scope of the On-bill Payment pilot proposed in the Company's filing to include a cost analysis of adding a residential component. Consumers Energy will complete the residential cost analysis and provide initial findings to interested stakeholders no later than December 31, 2022. To expedite the pilot timeline, as part of this pilot, the Company is granted authority to fund up to 10 test projects in the residential and non-residential sectors, billing and collecting payment for these projects through the customer's monthly bill.

27. *Data Collection.* In 2022, Consumers Energy agrees to establish a process for tracking and reporting the following aggregate EWR data items and to provide an update to the parties to this settlement agreement on the process in the 4$^{th}$ quarter of 2022. Beginning on January 1, 2023, Consumers Energy will start tracking these items, and will provide interim findings by August 31, 2023 with inclusion in annual reconciliation filings to begin with the 2023 EWR annual reconciliation.

a. Residential customer participation by zip code (measure type, measure quantity, incentive amount, and savings by home/customer);

b. Number of energy assistance customers participating in EWR;

c. Number of energy assistance customers receiving EWR education/marketing;

d. CARE referrals to the EWR Income Qualified Program (single family and multifamily breakdowns, measures offered, measures installed, and marketing efforts by zip code); and

e. Income Qualified Program EWR measures and investment provided by community agencies as part of the Income Qualified program component and housing type information (i.e., single family vs. multifamily) from customers applying for energy assistance.

Additionally, beginning in the 4th quarter of 2022, Consumers Energy will include a voluntary request for customer income, race, and ethnicity in EWR post-participation surveys. All customer data collection, storage, and reporting will comply with current Commission data and privacy regulations and is subject to future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

28. *Reporting.* For all reporting identified above, and unless otherwise reflected, Consumers Energy will provide reporting and status updates on data and reporting items and settlement item progress overall in biannual update meetings with the parties and in annual reconciliation reports, (certain reporting items (as named above) will begin with the 2023 EWR Reconciliation). Updates and reporting on these items will also be provided at the EWR Collaborative, EWR Low-Income Workgroup, and/or the Energy Affordability and Accessibility Collaborative at least once a year.

29. *Stakeholder Engagement.* The parties agree that Consumers Energy will continue its practice of consulting with Staff and stakeholders prior to filing its next EWR Plan to review investment, savings, portfolio composition, and other key elements with the purpose of incorporating stakeholder considerations when possible in the initial filing.

30. To the extent the Company proposes to increase its level of investment in helping low-income customers as part of the Company's next EWR Plan, Consumers Energy will consider whether it can accomplish such increase and cost-effectively reach the EWR savings targets without increasing total EWR program costs.

31. This settlement is entered into for the sole and express purpose of reaching a compromise among the parties. All offers of settlement and discussions relating to this settlement are, and shall be considered, privileged under MRE 408. If the Commission approves this Settlement Agreement without modification, neither the parties to this Settlement Agreement nor the Commission shall make any reference to or use this Settlement Agreement, or the order approving it, as a reason, authority, rationale, or example for taking any action or position or making any subsequent decision in any other case or proceeding; provided, however, such references may be made to enforce or implement the provisions of this Settlement Agreement and the order approving it.

32. This Settlement Agreement is based on the facts and circumstances of this case and is intended for the final disposition of Case No. U-20875. So long as the Commission approves this Settlement Agreement without any modification, the parties agree not to appeal, challenge, or otherwise contest the Commission order approving this Settlement Agreement. Except as otherwise set forth herein, the parties agree and understand that this Settlement Agreement does

not limit any party's right to take new and/or different positions on similar issues in other administrative proceedings or appeals related thereto.

33. This settlement is not severable. Each provision of the Settlement Agreement is dependent upon all other provisions of this Settlement Agreement. Failure to comply with any provision of this Settlement Agreement constitutes failure to comply with the entire Settlement Agreement. If the Commission rejects or modifies this Settlement Agreement or any provision of the Settlement Agreement, this Settlement Agreement shall be deemed to be withdrawn, shall not constitute any part of the record in this proceeding or be used for any other purpose, and shall be without prejudice to the pre-negotiation positions of the parties.

34. The parties agree that approval of this Settlement Agreement by the Commission would be reasonable and in the public interest.

35. The parties agree to waive Section 81 of the Administrative Procedures Act of 1969 (MCL 24.281), as it applies to the issues resolved in this Settlement Agreement if the Commission approves this Settlement Agreement without modification.

WHEREFORE, the undersigned parties respectfully request the Commission to approve this Settlement Agreement on an expeditious basis and to make it effective in accordance with its terms by final order.

**MICHIGAN PUBLIC SERVICE COMMISSION STAFF**

By: Heather M.S. Durian 2022.03.08 13:04:20 -05'00' _____ Date: _____

Heather M. S. Durian (P67587)
Nicholas Q. Taylor (P81020)
Assistant Attorneys General
Public Service Division
7109 W. Saginaw Highway
Lansing, MI 48911

**MICHIGAN ATTORNEY GENERAL**
**DANA NESSEL**

By: Michael Moody Digitally signed by Michael Moody Date: 2022.03.08 13:27:05 -05'00' Dated: _____

Michael E. Moody (P51985)
Assistant Attorney General
Special Litigation Division
6th Floor Williams Building
525 West Ottawa Street
Post Office Box 30755
Lansing, MI 48909

**CONSUMERS ENERGY COMPANY**

By: Digitally signed by Theresa A.G. Staley Date: 2022.03.08 10:15:54 -05'00' Date: March 8, 2022

Theresa A.G. Staley (P56998)
Gary A. Gensch, Jr. (P66912)
Attorney for Consumers Energy
One Energy Plaza
Jackson, MI 49201

**NATURAL RESOURCES DEFENSE COUNCIL,**
**THE NATIONAL HOUSING TRUST,**
**THE ECOLOGY CENTER, AND SIERRA CLUB**

By: _____ Date: _____

Christopher M. Bzdok (P53094)
Lydia Barbash-Riley (P81075)
Attorneys for NRDC, NHT,
The Ecology Center, and Sierra Club
Olson, Bzdok & Howard, P.C.
420 E. Front Street
Traverse City, MI 49686

**MICHIGAN ATTORNEY GENERAL**
**DANA NESSEL**

By: _____ Dated: _____

Michael E. Moody (P51985)
Assistant Attorney General
Special Litigation Division
6th Floor Williams Building
525 West Ottawa Street
Post Office Box 30755
Lansing, MI 48909

**CONSUMERS ENERGY COMPANY**




By: _____ Date: March 8, 2022

Theresa A.G. Staley (P56998)
Gary A. Gensch, Jr. (P66912)
Attorney for Consumers Energy
One Energy Plaza
Jackson, MI 49201

**NATURAL RESOURCES DEFENSE COUNCIL,**
**THE NATIONAL HOUSING TRUST,**
**THE ECOLOGY CENTER, AND SIERRA CLUB**




By: _____ Date: _____

Christopher M. Bzdok (P53094)
Lydia Barbash-Riley (P81075)
Attorneys for NRDC, NHT,
The Ecology Center, and Sierra Club
Olson, Bzdok & Howard, P.C.
420 E. Front Street
Traverse City, MI 49686

**SIERRA CLUB**

By: _____ Date: 3/8/22

Elena Saxonhouse
Managing Attorney
Sierra Club – Environmental Law Program
2101 Webster Street, Suite 1300
Oakland, CA 94612
(415) 265-2943

**ASSOCIATION OF BUSINESSES ADVOCATING TARIFF EQUITY**

By: _____ Date: _____

Stephen A. Campbell (P76684)
Attorneys for ABATE
Clark Hill PLC
212 East Grand River Avenue
Lansing, MI 48906

**SIERRA CLUB**

By: _____ Date: _____

Elena Saxonhouse
Managing Attorney
Sierra Club – Environmental Law Program
2101 Webster Street, Suite 1300
Oakland, CA 94612
(415) 265-2943

**ASSOCIATION OF BUSINESSES ADVOCATING TARIFF EQUITY**

Stephen A. Campbell

Digitally signed by: Stephen A. Campbell
DN: CN = Stephen A. Campbell email = scampbell@clarkhill.com C = US O = Clark Hill PLC
Date: 2022.03.09 16:14:48 -05'00'

By: _____ Date:_____

Stephen A. Campbell (P76684)
Attorneys for ABATE
Clark Hill PLC
212 East Grand River Avenue
Lansing, MI 48906

# ATTACHMENT A

M.P.S.C. No. 14 – Electric
Consumers Energy Company

Sheet No. D-2.10

# SURCHARGES

| Rate Schedule | Energy Efficiency Program Surcharge (Case No. U-~~20702~~ *20875*) Effective beginning the ~~January 2022~~ *April 2022* Billing Month[1] | | Distribution Charge for all Residential Rate Schedules | | Total Distribution Charge [5] | |
|---|---|---|---|---|---|---|
| Residential Rates | $ ~~0.003434~~ *0.004803*/kWh | + | $0.058971/kWh | = | $ ~~0.062405~~ *0.063774*/kWh | |
| | | | System Access Charge for each Non-Residential Rate Schedule | = | Total System Access Charge [5] | |
| Rate GS and GSTU | | | | | | |
| Tier 1: 0-1,250 kWh/mo. | $ ~~8.49~~ | *8.37*/billing meter + | $ 20.00/month | = | $ ~~28.49~~ | *28.37*/month |
| Tier 2: 1,251 – 5,000 kWh/mo. | ~~44.77~~ | *48.46*/billing meter + | 20.00/month | = | ~~64.77~~ | *68.46*/month |
| Tier 3: 5,001 – 30,000 kWh/mo. | ~~187.44~~ | *223.94*/billing meter + | 20.00/month | = | ~~207.44~~ | *243.94*/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~342.33~~ | *361.15*/billing meter + | 20.00/month | = | ~~362.33~~ | *381.15*/month |
| Tier 5: >50,000 kWh/mo. | ~~538.88~~ | *522.83*/billing meter + | 20.00/month | = | ~~558.88~~ | *542.83*/month |
| Rate GSD | | | | | | |
| Tier 1: 0-1,250 kWh/mo. | $ ~~8.49~~ | *8.37*/billing meter + | $ 30.00/month | = | $ ~~38.49~~ | *38.37*/month |
| Tier 2: 1,251 – 5,000 kWh/mo. | ~~44.77~~ | *48.46*/billing meter + | 30.00/month | = | ~~74.77~~ | *78.46*/month |
| Tier 3: 5,001 – 30,000 kWh/mo. | ~~187.44~~ | *223.94*/billing meter + | 30.00/month | = | ~~217.44~~ | *253.94*/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~342.33~~ | *361.15*/billing meter + | 30.00/month | = | ~~372.33~~ | *391.15*/month |
| Tier 5: >50,000 kWh/mo. | ~~538.88~~ | *522.83*/billing meter + | 30.00/month | = | ~~568.88~~ | *552.83*/month |
| Rate GP | | | | | | |
| Tier 1: 0-5,000 kWh/mo. | $ ~~22.82~~ | *24.75*/billing meter + | $ 100.00/month | = | $ ~~122.82~~ | *124.75*/month |
| Tier 2: 5,001 – 10,000 kWh/mo. | ~~74.91~~ | *67.95*/billing meter + | 100.00/month | = | ~~172.91~~ | *167.95*/month |
| Tier 3: 10,001 – 30,000 kWh/mo. | ~~325.17~~ | *332.43*/billing meter + | 100.00/month | = | ~~425.17~~ | *432.43*/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~678.14~~ | *754.28*/billing meter + | 100.00/month | = | ~~778.14~~ | *854.28*/month |
| Tier 5: >50,000 kWh/mo. | ~~1365.61~~ | *1574.11*/billing meter + | 100.00/month | = | ~~1465.61~~ | *1674.11*/month |
| Rate GPD, GPTU, and EIP | | | | | | |
| Tier 1: 0-5,000 kWh/mo. | $ ~~22.82~~ | *24.75*/billing meter + | $ 200.00/month | = | $ ~~222.82~~ | *224.75*/month |
| Tier 2: 5,001 – 10,000 kWh/mo. | ~~74.91~~ | *67.95*/billing meter + | 200.00/month | = | ~~274.91~~ | *267.95*/month |
| Tier 3: 10,001 – 30,000 kWh/mo. | ~~325.17~~ | *332.43*/billing meter + | 200.00/month | = | ~~525.17~~ | *532.43*/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~678.14~~ | *754.28*/billing meter + | 200.00/month | = | ~~878.14~~ | *954.28*/month |
| Tier 5: >50,000 kWh/mo. | ~~1365.61~~ | *1574.11*/billing meter + | 200.00/month | = | ~~1565.61~~ | *1774.11*/month |
| Rate LTILRR and LED | ~~1365.61~~ | *1574.11*/billing meter + | As specified in customer's written agreement | = | | Customer specific total per month |
| Rate GSG-2 [3] | NA | | NA | | NA | |
| Rate GML [3] [4] | NA | | NA | | NA | |
| Rate GUL [3] [4] | $ 0.27/fixture per month [2] | | NA | | NA | |
| Rate GU-LED | NA | | NA | | NA | |
| Rate GU | NA | | NA | | NA | |
| Rate PA | NA | | NA | | NA | |
| Rate ROA-R, ROA-S, ROA-P | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule | |

The customer's consumption will be reviewed annually in the January bill month. Following the annual review, the customer may be subsequently moved to the Surcharge level for their applicable rate for the next billing period based on the customer's average consumption for the previous year. In situations where no historical consumption is available, the monthly Surcharge level will be based on the lowest consumption category for the secondary rate schedules, or the lowest consumption category for primary rate schedules. No retroactive adjustment will be made due to the application of the Energy Efficiency Program Surcharge associated with the increases or decreases in consumption.

[1] This is subject to all general terms and conditions as shown in Rule C12., Energy Efficiency. The Energy Efficiency Program Surcharge amount may vary during specific months as authorized by the Michigan Public Service Commission. The Company will file a new tariff sheet to reflect any change in surcharges once the financial incentive recovery period has been completed.

[2] Company-Owned lighting fixture customers served on General Service Unmetered Lighting Rate GUL shall pay this surcharge. Rate codes 1455 and 1460 will not be charged this surcharge.

[3] Additional Rate Schedules can opt-in to the Energy Efficiency Program as described in Rule C12., Energy Efficiency.

[4] Lighting rates that choose to opt-in to the Energy Efficiency Program shall be assessed $0.27 per fixture per month.

[5] This charge will be shown on the monthly utility bill using the methodology as described in Rule C12., Energy Efficiency.

Issued XXXXXX XX, 2022 by
Garrick J. Rochow,
President and Chief Executive Officer,
Jackson, Michigan

Effective for bills rendered on and after
the Company's April 2022 Billing Month

Issued under authority of the
Michigan Public Service Commission
dated XXXXXX XX, 2022
in Case No. U-20875

**M.P.S.C. No. 14 – Electric**
**Consumers Energy Company** **Sheet No. D-2.20**

## SURCHARGES

| Rate Schedule | Energy Efficiency Self-Directed Customer Surcharge (Case No. U-~~20702~~ *20875*) Effective beginning the ~~August 2020~~ *April 2022* Billing Month[1] | | System Access Charge for each Non-Residential Rate Schedule | | Total System Access Charge[5] |
|---|---|---|---|---|---|
| Residential Rates | N/A | | | | |
| Rate GS and GSTU | | | | | |
| Tier 1: 0-1,250 kWh/mo. | $ ~~0.55~~ *0.84* | /billing meter + | $ 20.00/month | = | $ ~~20.55~~ *20.84* /month |
| Tier 2: 1,251 – 5,000 kWh/mo. | ~~2.93~~ *4.88* | /billing meter + | 20.00/month | = | ~~22.93~~ *24.88* /month |
| Tier 3: 5,001 – 30,000 kWh/mo. | ~~13.99~~ *21.72* | /billing meter + | 20.00/month | = | ~~33.99~~ *41.72* /month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~21.40~~ *37.01* | /billing meter + | 20.00/month | = | ~~41.40~~ *57.01* /month |
| Tier 5: >50,000 kWh/mo. | ~~32.05~~ *54.51* | /billing meter + | 20.00/month | = | ~~52.05~~ *74.51* /month |
| Rate GSD | | | | | |
| Tier 1: 0-1,250 kWh/mo. | $ ~~0.55~~ *0.84* | /billing meter + | $ 30.00/month | = | $ ~~30.55~~ *30.84* /month |
| Tier 2: 1,251 – 5,000 kWh/mo. | ~~2.93~~ *4.88* | /billing meter + | 30.00/month | = | ~~32.93~~ *34.88* /month |
| Tier 3: 5,001 – 30,000 kWh/mo. | ~~13.99~~ *21.72* | /billing meter + | 30.00/month | = | ~~43.99~~ *51.72* /month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~21.40~~ *37.01* | /billing meter + | 30.00/month | = | ~~51.40~~ *67.01* /month |
| Tier 5: >50,000 kWh/mo. | ~~32.05~~ *54.51* | /billing meter + | 30.00/month | = | ~~62.05~~ *84.51* /month |
| Rate GP | | | | | |
| Tier 1: 0-5,000 kWh/mo. | $ ~~1.34~~ *2.59* | /billing meter + | $ 100.00/month | = | $ ~~101.34~~ *102.59* /month |
| Tier 2: 5,001 – 10,000 kWh/mo. | ~~4.71~~ *6.85* | /billing meter + | 100.00/month | = | ~~104.71~~ *106.85* /month |
| Tier 3: 10,001 – 30,000 kWh/mo. | ~~22.03~~ *32.89* | /billing meter + | 100.00/month | = | ~~122.03~~ *132.89* /month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~49.64~~ *72.95* | /billing meter + | 100.00/month | = | ~~149.64~~ *172.95* /month |
| Tier 5: >50,000 kWh/mo. | ~~86.57~~ *153.44* | /billing meter + | 100.00/month | = | ~~186.57~~ *253.44* /month |
| Rate GPD, GPTU, and EIP | | | | | |
| Tier 1: 0-5,000 kWh/mo. | $ ~~1.34~~ *2.59* | /billing meter + | $ 200.00/month | = | $ ~~201.34~~ *202.59* /month |
| Tier 2: 5,001 – 10,000 kWh/mo. | ~~4.71~~ *6.85* | /billing meter + | 200.00/month | = | ~~204.71~~ *206.85* /month |
| Tier 3: 10,001 – 30,000 kWh/mo. | ~~22.03~~ *32.89* | /billing meter + | 200.00/month | = | ~~222.03~~ *232.89* /month |
| Tier 4: 30,001 – 50,000 kWh/mo. | ~~49.64~~ *72.95* | /billing meter + | 200.00/month | = | ~~249.64~~ *272.95* /month |
| Tier 5: >50,000 kWh/mo. | ~~86.57~~ *153.44* | /billing meter + | 200.00/month | = | ~~286.57~~ *353.44* /month |
| Rate LTILRR and LED | ~~86.57~~ *153.44* | /billing meter + | As specified in customer's written agreement | = | Customer specific total per month |
| Rate GSG-2 [3] | NA | | NA | | NA |
| Rate GML [3] [4] | NA | | NA | | NA |
| Rate GUL [3] [4] | $ 0.27/fixture per month [2] | | NA | | NA |
| Rate GU-LED | NA | | NA | | NA |
| Rate GU | NA | | NA | | NA |
| Rate PA | NA | | NA | | NA |
| Rate ROA-R, ROA-S, ROA-P | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule |

The customer's consumption will be reviewed annually in the January bill month. Following the annual review, the customer may be subsequently moved to the Surcharge level for their applicable rate for the next billing period based on the customer's average consumption for the previous year. In situations where no historical consumption is available, the monthly Surcharge level will be based on the lowest consumption category for the secondary rate schedules, or the lowest consumption category for primary rate schedules. No retroactive adjustment will be made due to the application of the Energy Efficiency Program Surcharge associated with the increases or decreases in consumption.

[1] An eligible customer who files and implements a self-directed plan in compliance with Rule C12 is required to pay the Energy Efficiency Self-Directed Program Surcharge.

[2] This charge will be shown on the monthly utility bill using the methodology as described in Rule C12, Energy Efficiency.

M.P.S.C. No. 14 – Electric
Consumers Energy Company



# SURCHARGES

| Rate Schedule | Energy Efficiency Program Surcharge (Case No. U-*20875* ~~20865~~) Effective beginning the January *2023* ~~2022~~ Billing Month[1] | | ~~Distribution Charge for all Residential Rate Schedules~~ / *Energy Efficiency Self-Directed Customer Surcharge (Case No. U-20875) Effective beginning the January 2023 Billing Month* | | ~~Total Distribution Charge~~ / ~~System Access Charge~~ |
|---|---|---|---|---|---|
| | | ~~+~~ | ~~$0.058971/kWh~~ | | ~~$ 0.062405/kWh~~ |
| Residential Rates | $*0.004712* ~~0.003434~~/kWh | | *NA* | | |
| *Non-Residential Rates* | | | | | |
| *Tier 1: 0 – 2,000 kWh/mo.* | *$7.42/billing meter* | | *$0.82/billing meter* | | |
| *Tier 2: 2,001 – 5,000 kWh/mo.* | *48.87/billing meter* | | *5.42/billing meter* | | |
| *Tier 3: 5,001 – 10,000 kWh/mo.* | *107.62/billing meter* | | *11.93/billing meter* | | |
| *Tier 4: 10,001 – 30,000 kWh/mo.* | *254.96/billing meter* | | *28.24/billing meter* | | |
| *Tier 5: 30,001 – 50,000 kWh/mo.* | *616.41/billing meter* | | *63.37/billing meter* | | |
| *Tier 6: 50,001 – 75,000 kWh/mo.* | *920.63/billing meter* | | *102.12/billing meter* | | |
| *Tier 7: 75,001 – 100,000 kWh/mo.* | *1265.73/billing meter* | | *140.40/billing meter* | | |
| *Tier 8: 100,001 – 150,000 kwh/mo.* | *1402.59/billing meter* | | *155.58/billing meter* | | |
| *Tier 9: 150,001 – 250,000 kWh/mo.* | *1635.12/billing meter* | | *181.37/billing meter* | | |
| *Tier 10: >250,000 kWh/mo.* | *1784.14/billing meter* | | *182.82/billing meter* | | |
| ~~Rate GS and GSTU~~ | | | | | |
| ~~Tier 1: 0–1,250 kWh/mo.~~ | ~~$ 8.49/billing meter~~ | ~~+~~ | ~~$ 20.00/month~~ | ~~=~~ | ~~$ 28.49/month~~ |
| ~~Tier 2: 1,251 – 5,000 kWh/mo.~~ | ~~44.77/billing meter~~ | ~~+~~ | ~~20.00/month~~ | ~~=~~ | ~~64.77/month~~ |
| ~~Tier 3: 5,001 – 30,000 kWh/mo.~~ | ~~187.44/billing meter~~ | ~~+~~ | ~~20.00/month~~ | ~~=~~ | ~~207.44/month~~ |
| ~~Tier 4: 30,001 – 50,000 kWh/mo.~~ | ~~342.33/billing meter~~ | ~~+~~ | ~~20.00/month~~ | ~~=~~ | ~~362.33/month~~ |
| ~~Tier 5: >50,000 kWh/mo.~~ | ~~538.88/billing meter~~ | ~~+~~ | ~~20.00/month~~ | ~~=~~ | ~~558.88/month~~ |
| ~~Rate GSD~~ | | | | | |
| ~~Tier 1: 0–1,250 kWh/mo.~~ | ~~$ 8.49/billing meter~~ | ~~+~~ | ~~$ 30.00/month~~ | ~~=~~ | ~~$ 38.49/month~~ |
| ~~Tier 2: 1,251 – 5,000 kWh/mo.~~ | ~~44.77/billing meter~~ | ~~+~~ | ~~30.00/month~~ | ~~=~~ | ~~74.77/month~~ |
| ~~Tier 3: 5,001 – 30,000 kWh/mo.~~ | ~~187.44/billing meter~~ | ~~+~~ | ~~30.00/month~~ | ~~=~~ | ~~217.44/month~~ |
| ~~Tier 4: 30,001 – 50,000 kWh/mo.~~ | ~~342.33/billing meter~~ | ~~+~~ | ~~30.00/month~~ | ~~=~~ | ~~372.33/month~~ |
| ~~Tier 5: >50,000 kWh/mo.~~ | ~~538.88/billing meter~~ | ~~+~~ | ~~30.00/month~~ | ~~=~~ | ~~568.88/month~~ |
| ~~Rate GP~~ | | | | | |
| ~~Tier 1: 0–5,000 kWh/mo.~~ | ~~$ 22.82/billing meter~~ | ~~+~~ | ~~$ 100.00/month~~ | ~~=~~ | ~~$ 122.82/month~~ |
| ~~Tier 2: 5,001 – 10,000 kWh/mo.~~ | ~~74.91/billing meter~~ | ~~+~~ | ~~100.00/month~~ | ~~=~~ | ~~174.91/month~~ |
| ~~Tier 3: 10,001 – 30,000 kWh/mo.~~ | ~~325.17/billing meter~~ | ~~+~~ | ~~100.00/month~~ | ~~=~~ | ~~425.17/month~~ |
| ~~Tier 4: 30,001 – 50,000 kWh/mo.~~ | ~~678.14/billing meter~~ | ~~+~~ | ~~100.00/month~~ | ~~=~~ | ~~778.14/month~~ |
| ~~Tier 5: >50,000 kWh/mo.~~ | ~~1365.61/billing meter~~ | ~~+~~ | ~~100.00/month~~ | ~~=~~ | ~~1465.61/month~~ |
| ~~Rate GPD, GPTU, and EIP~~ | | | | | |
| ~~Tier 1: 0–5,000 kWh/mo.~~ | ~~$ 22.82/billing meter~~ | ~~+~~ | ~~$ 200.00/month~~ | ~~=~~ | ~~$ 222.82/month~~ |
| ~~Tier 2: 5,001 – 10,000 kWh/mo.~~ | ~~74.91/billing meter~~ | ~~+~~ | ~~200.00/month~~ | ~~=~~ | ~~274.91/month~~ |
| ~~Tier 3: 10,001 – 30,000 kWh/mo.~~ | ~~325.17/billing meter~~ | ~~+~~ | ~~200.00/month~~ | ~~=~~ | ~~525.17/month~~ |
| ~~Tier 4: 30,001 – 50,000 kWh/mo.~~ | ~~678.14/billing meter~~ | ~~+~~ | ~~200.00/month~~ | ~~=~~ | ~~878.14/month~~ |
| ~~Tier 5: >50,000 kWh/mo.~~ | ~~1365.61/billing meter~~ | ~~+~~ | ~~200.00/month~~ | ~~=~~ | ~~1565.61/month~~ |
| ~~Rate LTILRR *and LED*~~ | ~~1365.61/billing meter~~ | ~~+~~ | ~~As specified in customer's written agreement~~ | ~~=~~ | ~~Customer specific total per month~~ |
| Rate GSG-2 [3] | NA | | NA | | ~~NA~~ |
| Rate GML [3] [4] | NA | | NA | | ~~NA~~ |
| Rate GUL [3] [4] | $ 0.27/fixture per month [~~2~~] | | NA | | ~~NA~~ |
| Rate GU-LED | NA | | NA | | ~~NA~~ |
| Rate GU | NA | | NA | | ~~NA~~ |
| Rate PA | NA | | NA | | ~~NA~~ |
| Rate ROA-R, ROA-S, ROA-P | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule | | ~~Same as Full Service Delivery Rate Schedule~~ |

The customer's consumption will be reviewed annually in the January bill month. Following the annual review, the customer may be subsequently moved to the Surcharge level for their applicable rate for the next billing period based on the customer's average consumption for the previous year. In situations where no historical consumption is available, the monthly Surcharge level will be based on the lowest consumption category or the secondary rate schedules, or the lowest consumption category for primary rate schedules. No retroactive adjustment will be made due to the application of the Energy Efficiency Program Surcharge associated with the increases or decreases in consumption.

(1) This is subject to all general terms and conditions as shown in Rule C12, Energy Efficiency. The Energy Efficiency Program Surcharge amount may vary during specific months as authorized by the Michigan Public Service Commission. The Company will file a new tariff sheet to reflect any change in surcharges once the financial incentive recovery period has been completed.

(2) *Non-Residential Rates include GS, GSTU, GSD, GP, GPTU, GPD, EIP, LITLLR and LED.*

(32) Company-Owned lighting fixture customers served on General Service Unmetered Lighting Rate GUL shall pay this surcharge. Rate codes 1455 and 1460 will not be charged this surcharge.

(43) Additional Rate Schedules can opt-in to the Energy Efficiency Program as described in Rule C12., Energy Efficiency.

(54) Lighting rates that choose to opt-in to the Energy Efficiency Program shall be assessed $0.27 per fixture per month.

(65) This charge will be shown on the monthly utility bill using the methodology as described in Rule C12, Energy Efficiency.

(7) *An eligible customer who files and implements a self-directed plan in compliance with Rule C12 is required to pay the Energy Efficiency Self-Directed Program Surcharge.*

M.P.S.C. No. 14 – Electric
Consumers Energy Company

Sheet No. D-2.20

*This sheet has been cancelled and is reserved for future use.*

## SURCHARGES

| Rate Schedule | Energy Efficiency Self-Directed Customer Surcharge (Case No. U-20372) Effective beginning the August 2020 Billing Month [1] | | System Access Charge for each Non-Residential Rate Schedule | | Total System Access Charge [2] |
|---|---|---|---|---|---|
| Residential Rates | N/A | | | | |
| Rate GS and GSTU | | | | | |
| Tier 1: 0-1,250 kWh/mo. | $ 0.55/billing meter | + | $ 20.00/month | = | $ 20.55/month |
| Tier 2: 1,251 – 5000 kWh/mo. | 2.93/billing meter | + | 20.00/month | = | 22.93/month |
| Tier 3: 5,001 – 30,000 kWh/mo. | 13.99/billing meter | + | 20.00/month | = | 33.99/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | 21.40/billing meter | + | 20.00/month | = | 41.40/month |
| Tier 5: >50,000 kWh/mo. | 32.05/billing meter | + | 20.00/month | = | 52.05/month |
| Rate GSD | | | | | |
| Tier 1: 0-1,250 kWh/mo. | $ 0.55/billing meter | + | $ 30.00/month | = | $ 30.55/month |
| Tier 2: 1,251 – 5000 kWh/mo. | 2.93/billing meter | + | 30.00/month | = | 32.93/month |
| Tier 3: 5,001 – 30,000 kWh/mo. | 13.99/billing meter | + | 30.00/month | = | 43.99/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | 21.40/billing meter | + | 30.00/month | = | 51.40/month |
| Tier 5: >50,000 kWh/mo. | 32.05/billing meter | + | 30.00/month | = | 62.05/month |
| Rate GP | | | | | |
| Tier 1: 0-5,000 kWh/mo. | $ 1.34/billing meter | + | $ 100.00/month | = | $ 101.34/month |
| Tier 2: 5,001 – 10,000 kWh/mo. | 4.71/billing meter | + | 100.00/month | = | 104.71/month |
| Tier 3: 10,001 – 30,000 kWh/mo. | 22.03/billing meter | + | 100.00/month | = | 122.03/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | 49.64/billing meter | + | 100.00/month | = | 149.64/month |
| Tier 5: >50,000 kWh/mo. | 86.57/billing meter | + | 100.00/month | = | 186.57/month |
| Rate GPD, GPTU, and EIP | | | | | |
| Tier 1: 0-5,000 kWh/mo. | $ 1.34/billing meter | + | $ 200.00/month | = | $ 201.34/month |
| Tier 2: 5,001 – 10,000 kWh/mo. | 4.71/billing meter | + | 200.00/month | = | 204.71/month |
| Tier 3: 10,001 – 30,000 kWh/mo. | 22.03/billing meter | + | 200.00/month | = | 222.03/month |
| Tier 4: 30,001 – 50,000 kWh/mo. | 49.64/billing meter | + | 200.00/month | = | 249.64/month |
| Tier 5: >50,000 kWh/mo. | 86.57/billing meter | + | 200.00/month | = | 286.57/month |
| Rate LTILRR *and LED* | 86.57/billing meter | + | As specified in the customer's written agreement | = | Customer specific total per month |
| Rate GSG-2 | N/A | | N/A | | N/A |
| Rate GML | N/A | | N/A | | N/A |
| Rate GUL | N/A | | N/A | | N/A |
| Rate GU-LED | N/A | | N/A | | N/A |
| Rate GU | N/A | | N/A | | N/A |
| Rate PA | N/A | | N/A | | N/A |
| Rate ROA-R, ROA-S, ROA-P | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule | | Same as Full Service Delivery Rate Schedule |

The customer's consumption will be reviewed annually in the January bill month. Following the annual review, the customer may be subsequently moved to the Surcharge level for their applicable rate for the next billing period based on the customer's average consumption for the previous year. In situations where no historical consumption is available, the monthly Surcharge level will be based on the lowest consumption category or the secondary rate schedules, or the lowest consumption category for primary rate schedules. No retroactive adjustment will be made due to the application of the Energy Efficiency Program Surcharge associated with the increases or decreases in consumption.

[1] An eligible customer who files and implements a self-directed plan in compliance with Rule C12 is required to pay the Energy Efficiency Self-Directed Program Surcharge.

[2] This charge will be shown on the monthly utility bill using the methodology as described in Rule C12, Energy Efficiency.

Issued XXXXXX XX, 2022 by
Garrick J. Rochow,
President and Chief Executive Officer,
Jackson, Michigan

Effective for bills rendered on and after
the Company's January 2023 Billing Month

Issued under authority of the
Michigan Public Service Commission
dated XXXXXX XX, 2022
in Case No. U-20875

M.P.S.C. No. 14 – Electric
Consumers Energy Company

Sheet No. C-65.00

(Continued From Sheet No. C-64.00)

## C12. ENERGY EFFICIENCY (EE)

C12.1 Energy Efficiency Program – Electric

This rule implements the energy waste reduction (EWR) requirements of 2008 PA 295 and as amended in 2016 PA 342 in accordance with Orders issued by the Commission in Case No. U-15805. The monthly Energy Efficiency surcharges to be applied to each Rate Schedule are shown on Sheet No. D-2.10 of this Rate Book and shall be added with an existing fixed or volumetric charge on each eligible Rate Schedule as described below:

(1) For all customers on Residential Rate Schedules, the Energy Efficiency Program Surcharge *will show on the bill as Other Surcharges* ~~shall be added to the Distribution Charge~~ for both Full Service and ROA customers each month.

(2) For all eligible Nonresidential customers, the Energy Efficiency Program Surcharge *will show on the bill as Other Surcharges* ~~shall be added to the System Access charge~~ for both Full Service and ROA customers each month.

(3) For all Company-Owned lighting fixture customers served on General Service Unmetered Lighting Rate GUL, the Energy Efficiency Program Surcharge *will show on the bill as Other Surcharges* ~~shall be added to the Distribution Charge~~ per Luminaire each month.

The customer's consumption will be reviewed annually in the January bill month. Following the annual review, the customer may be subsequently moved to the Surcharge level for their applicable rate for the next billing period based on the customer's average consumption for the previous year. In situations where no historical consumption is available, the monthly Surcharge level will be based on the lowest consumption category for the secondary rate schedules or the lowest consumption category for primary rate schedules. No retroactive adjustment will be made due to the application of the Energy Efficiency Program Surcharge associated with increases or decreases in consumption.

A. Opt-In Option

(1) Customer-Owned lighting fixture customers served on General Service Unmetered Lighting Rate GUL and customers served on General Service Metered Lighting Rate GML are eligible to participate in the Energy Efficiency Program. The Energy Efficiency Program Surcharge will be billed monthly as follows:

a. Customers on Rate GUL shall have the per fixture surcharge multiplied by the number of fixtures for the customer's account ~~added to the Distribution Charge~~ per Luminaire *and will show on the bill as Other Surcharges* each month.

b. Customers on Rate GML shall have the per fixture surcharge multiplied by the number of fixtures for the customer's account ~~added to the System Access Charge~~ per billing meter *and will show on the bill as Other Surcharges* per month.

(2) Customers served on General Service Self Generation Rate GSG-2 are eligible to participate in the Energy Efficiency Program. These customers shall be charged the Large General Service Primary Demand Rate GPD Tier 5: > 50,000 kWh/mo. rate per billing meter per month as shown on Sheet No. D-2.10. The Energy Efficiency Program Surcharge ~~will be added to the appropriate System Access Charge~~ *is calculated* per billing meter per month*, and will show on the bill as Other Surcharges*.

C12.2 Self-Directed Customer Plans

An eligible primary or secondary electric customer is exempt from the mandatory energy efficiency surcharge(s), with the exception of the surcharge funding low-income programs as well as review and evaluation costs, if the customer files and implements a self-directed energy efficiency plan.

A. Eligibility

(1) Customers must have had an annual peak demand in the preceding year of at least 1 megawatt in the aggregate at all sites to be covered by the self-directed plan.

(2) The customer and sites covered by an implemented self-directed plan are not eligible to participate in any energy efficiency program of the Company.

B. Requirements

(1) A customer with a self-directed plan is required to pay the self-directed customer program surcharge. It *will show on the bill as Other Surcharges* ~~shall be added to the existing System Access Charge~~ for both Full Service and ROA customers that qualify.

(Continued on Sheet No. C-66.00)

M.P.S.C. No. 3 - Gas
Consumers Energy Company

Sheet No. D-2.00

# SURCHARGES

Each Rate Schedule may be subject to Rule No. C8., Customer Attachment Program.

| Rate Schedule | Energy Efficiency [1] Program Surcharge (Case No. U-*20875* ~~20865~~) Effective beginning the *April* ~~January~~ 2022 Billing Month [2] | | Distribution Charge per Mcf for all Mcf | | Total Distribution Charge [3] |
|---|---|---|---|---|---|
| Rate A | $*0.3785* ~~0.2709~~/Mcf | + | $4.2013 /Mcf | = | $*4.5798* ~~4.4722~~/Mcf |
| Rate A-1 | *0.3785* ~~0.2709~~/Mcf | + | 4.2013 /Mcf | = | *4.5798* ~~4.4722~~ /Mcf |
| Rate GS-1 | *0.5466* ~~0.4795~~/Mcf | + | 3.6255 /Mcf | = | *4.1721* ~~4.1050~~ /Mcf |
| Rate GS-2 | *0.5466* ~~0.4795~~/Mcf | + | 2.7060 /Mcf | = | *3.2526* ~~3.1855~~ /Mcf |
| Rate GS-3 | | | | | |
| 0 – 100,000 / Year | *0.5466* ~~0.4795~~/Mcf | + | 2.5344 /Mcf | = | *3.0810* ~~3.0139~~ /Mcf |
| > 100,000 / Year | *0.0181* ~~0.0153~~/Mcf | + | 2.5344 /Mcf | = | *2.5525* ~~2.5497~~ /Mcf |
| Rate GL | NA | | | | |
| Rate ST | | | Transportation Charge per Mcf for all Mcf | | Total Transportation Charge [3] |
| 0 – 100,000 / Year | *0.5466* ~~0.4795~~/Mcf | + | $1.2162 /Mcf | = | $*1.7628* ~~1.6957~~/Mcf |
| > 100,000 / Year | *0.0181* ~~0.0153~~/Mcf | + | 1.2162 /Mcf | = | *1.2343* ~~1.2315~~ /Mcf |
| Rate LT | | | | | |
| 0 – 100,000 / Year | *0.5466* ~~0.4795~~/Mcf | + | 1.1330 /Mcf | = | *1.6796* ~~1.6125~~ /Mcf |
| > 100,000 / Year | *0.0181* ~~0.0153~~/Mcf | + | 1.1330 /Mcf | = | *1.1511* ~~1.1483~~ /Mcf |
| Rate XLT | | | | | |
| 0 – 100,000 / Year | *0.5466* ~~0.4795~~/Mcf | + | 0.7900 /Mcf | = | *1.3366* ~~1.2695~~ /Mcf |
| > 100,000 / Year | *0.0181* 0.0153/Mcf | + | 0.7900 /Mcf | = | *0.8081* ~~0.8053~~ /Mcf |
| Rate XXLT | | | | | |
| 0 – 100,000 / Year | NA | | NA | | NA |
| > 100,000 / Year | *0.0181* ~~0.0153~~/Mcf | + | 0.4375 /Mcf | = | *0.4556* ~~0.4528~~ /Mcf |
| Rate CC | Per applicable distribution Rate Schedule | | | | |

[1] All surcharges shall be applied on a monthly basis. The customer's consumption will be reviewed annually in the January bill month. Following the annual review, the customer may be subsequently moved to the surcharge level for their applicable rate for the next billing period based on the customer's average consumption for the previous year. No retroactive adjustment will be made due to the application of EE surcharges associated with increases or decreases in consumption.

[2] An Energy Efficiency Program Surcharge amount may vary during specific months as authorized by the Michigan Public Service Commission. The Company will file a new tariff sheet to reflect any change in surcharges once the financial incentive recovery period has been completed.

[3] The Energy Efficiency Program Surcharge and either the Distribution or Transportation Charge per Mcf for all Mcf for each rate will be added and shown as above on the monthly utility bill for all customers.

M.P.S.C. No. 3 - Gas
Consumers Energy Company

Sheet No. D-2.10

## SURCHARGES

Each Rate Schedule may be subject to Rule No. C8., Customer Attachment Program.

| Rate Schedule | Energy Efficiency Large Gas Transportation Opt-Out Program Surcharge [1] (Case No. U-*20875* ~~20372~~) Effective beginning the *April 2022* ~~August 2020~~ Billing Month | | Transportation Charge per Mcf for all Mcf | | Total Transportation Charge [2] |
|---|---|---|---|---|---|
| Rate A | NA | | NA | | NA |
| Rate A-1 | NA | | NA | | NA |
| Rate GS-1 | NA | | NA | | NA |
| Rate GS-2 | NA | | NA | | NA |
| Rate GS-3 | NA | | NA | | NA |
| Rate GL | NA | | NA | | NA |
| Rate ST > 100,000 / Year | $*0.0046* ~~0.0033~~/Mcf | + | $1.2162/Mcf | = | $*1.2208* ~~1.2195~~/Mcf |
| Rate LT > 100,000 / Year | *0.0046* ~~0.0033~~/Mcf | + | 1.1330/Mcf | = | *1.1376* ~~1.1363~~/Mcf |
| Rate XLT > 100,000 / Year | *0.0046* ~~0.0033~~/Mcf | + | 0.7900/Mcf | = | *0.7946* ~~0.7933~~/Mcf |
| Rate XXLT > 100,000 / Year | *0.0046* ~~0.0033~~/Mcf | + | 0.4375/Mcf | = | *0.4421* ~~0.4408~~/Mcf |
| Rate CC | N/A | | | | |

(1) Gas Transportation customers on Rate ST, LT, XLT, or XXLT using more than 100,000 Mcf per year may be eligible to opt-out of the Energy Efficiency program. Eligible customers who elect to opt-out of the Energy Efficiency program will pay the Energy Efficiency Large Gas Transportation Opt-Out Program surcharge per Mcf on a monthly basis. This surcharge will be added to the Transportation charge for each applicable Rate Schedule. Eligibility is determined solely by the Company and is dependent upon terms and conditions of the Energy Efficiency Large Gas Transportation Customer Opt-Out Program as authorized in the April 17, 2012 order in Case No. U-16670.

(2) The Energy Efficiency Large Gas Transportation Opt-Out Program Surcharge and the Transportation Charge per Mcf for all Mcf will be added and shown as above on the monthly utility bill for all customers.

# ATTACHMENT B

# Attachment B - Multifamily Program Coordinated Delivery

# 2022-2025 (U-20875)

## Purpose

The purpose of Attachment B is to outline Consumers Energy's One Stop Shop approach to administration of the EWR Multifamily Program as it pertains to the Company's EWR Plan U-20875 Settlement Agreement and Commission Order.

## Program Description

The Multifamily program assists two primary customer segments: 1) Market Rate Multifamily and 2) Income Qualified Multifamily* property owners and tenants. The goal of this program is to help these customers understand their buildings' current energy use, achieve immediate energy savings through no-cost direct install measures, and provide incentives for prescriptive and/or custom measures to achieve deeper energy savings. Properties will have access to incentives for both in-unit tenant spaces and common area spaces. The program will seek to drive property owners to achieve maximum savings possible by offering seamless access to incentives for energy efficiency upgrades, regardless of the income status, rate class, or fuel type. In single-fuel areas, Consumers Energy staff will collaborate with other utility program staff to help provide a comprehensive energy efficiency solution.

*Income Qualified is defined as follows: Properties with 66% or greater of tenants living at or under 250% of the federal poverty level, 80% Area Median Income, properties participating in affordable housing programs under HUD, USDA, LIHTC, or other entities, and/or Consumers Energy pre-approved income-qualified eligibility.

Multifamily program investment levels are provided in Attachment D and highlighted in paragraphs 7 and 8 of the Settlement Agreement.

## Program Features

1. **Property Assessment & Energy Savings Report** – this will be offered to every property; however, customers may forgo the assessment if they choose.
2. **Direct Install** of energy saving electric and natural gas products – will be offered at no cost to the customer; for Consumers Energy/DTE dual utility customers, the program will offer collaborative direct install with DTE.
3. **Prescriptive & Custom Incentives** – offered with a whole–building approach to savings. Incentives for market rate and income qualified multifamily programs may differ.
4. **Customer Qualification and Project Management** - multifamily implementation contractors engage with community partners and programs, assess publicly available data to identify and engage multifamily building owners and tenants, and conduct direct outreach to multifamily properties and trade allies to drive participation.

5. **Program Management** – energy advisors are assigned to properties to promote savings opportunities, educate owners and tenants on energy savings options and benefits, and provide guidance through the process and paperwork.
6. **ASHRAE Level 2 Audits -** offered to Income Qualified properties that are applying for Low Income Housing Tax Credits (LIHTC)
    a. For properties currently applying for LIHTC or currently planning/undergoing a LIHTC-funded rehabilitation, these projects will be offered a 36 + 2 months reservation, at a minimum. Language in the program application states incentives will be honored at the rate at which they were reserved, regardless of the program year the project completes and pays in. While the time period afforded customers in the current rebate reservation system has not been raised as a barrier to participation, the Company can test whether extending this period encourages participation.
7. **Benchmarking** – offered through the Consumers Energy Landlord Portal which is operated outside of the EWR program. Customers interested in benchmarking services will be directed to register for the Landlord Portal.

**Detailed Description of Services and Features**

1. **Property Assessment & Energy Savings Report**
    a. Some customers will receive a Building Assessment of their property with opportunities identified delivered in an Energy Savings Report. The on-site building assessment will include:
        i. Entry into attics, crawlspaces, and roofs
        ii. Review of construction documents (if available)
        iii. Blower door tests (if applicable)
        iv. Conversations with operations and maintenance staff
    b. Upon completion of the on-site Building Assessment the customer will receive a written and/or electronic copy of the Energy Savings Report. The report will provide specific recommendations for retrofit opportunities and serve as the basis for qualifying and prioritizing projects going forward. The Energy Savings Report will contain the following information:
        i. Report of current building conditions
        ii. Recommendations for energy efficiency upgrades including,
            1. Equipment specifications
            2. Estimated energy savings
            3. Estimated cost savings
            4. Estimated project payback
            5. Available program incentives
    c. Assessment database – program staff will utilize a database of existing equipment conditions collected from building assessments to provide follow-up and advice to customers based on the specific recommendations in their report. If the customer is unable to make an immediate investment this database will allow the program team to provide long-term support and engagement with the customer through follow-up on opportunities.

2. **Direct Install**
    a. After completion of the Building Assessment, the customer will be scheduled to receive direct installation of no cost energy savings measures at their facility, if they have not already completed these either on their own or through the program. No cost items will be installed by program staff as dictated by program rules in order to provide direct benefits to participants. Measures will be installed in-unit and in common areas to maximize energy savings. Measures include both electric and natural gas as listed here:
        i. LED lighting
        ii. Low-flow showerheads
        iii. Kitchen and bath aerators
        iv. Pipe wrap
        v. Thermostats (where applicable)
        vi. In-unit smart 7 plug power strips (where applicable)
        vii. Shower start valves (where applicable)
        viii. In-unit refrigerator replacement (on a limited basis)

3. **Incentives**
    a. **Prescriptive Incentives:** Incentives are paid on a per measure basis where a standard savings value per measure has been deemed. Measures are offered in the following categories:
        i. HVAC
        ii. Insulation
        iii. Lighting
        iv. Domestic Hot Water
    b. **Custom Incentives:** Paid on a per measure basis with savings calculated specifically for each project. These incentives are intended to cover all energy saving measures that are not included in the prescriptive measures and are paid on cents per kWh saved and dollars per MCF of natural gas saved.

4. **Project Management – Energy Advisors**
    a. Energy Advisors from the program team will engage in focused, proactive outreach activities to identify qualifying customers. Energy Advisors will be responsible for:
        i. Educating property managers about the program and its benefits
        ii. Facilitating the customer's participation in the program, beginning with Building Assessment, scheduling Direct Install, and identifying and supporting the customer through prescriptive/custom projects
        iii. Identifying low-income properties to target for EWR participation
            1. Energy Advisors and multifamily program management engage with local and state housing agencies, state EWR and energy assistance collaborative efforts, and internal collaborative efforts

to identify and target potential income-qualified properties for marketing and outreach.

2. The program may also use external data sources such as MSHDA and Low Income Housing Tax Credit Applicant Information (LIHTC) to support outreach and customer engagement efforts.

b. The Building Assessment will identify larger energy saving projects requiring customer investment and trade ally participation. Energy Advisors and Engineers will provide project management support through the following methods:
   i. Support prioritizing projects based on the customer's criteria (payback, cost, incentives) – this information will be available through the Energy Savings Report
   ii. Assistance identifying and connecting owners with local trade allies
   iii. Assistance completing the incentive application
   iv. Post inspection of completed projects*
   v. Referrals to program partners for available financing options

*Note: Due to the large volume of projects received in a program year post inspection cannot be completed on 100% of projects. Inspections will be conducted according to the guidelines in the Policies and Procedures manual.

**5. ASHRAE Level 2 Audits for LIHTC Properties**

a. Consumers Energy will cover up to 100% of an ASHRAE Level 2 audit, not to exceed $10,000 per property for properties applying for LIHTC through MSHDA. Consumers Energy will use a vetted group of third-party service providers to complete these audits for qualifying properties.
b. Properties applying for LIHTC will also be eligible to receive a 36-month reservation for their project. To be eligible for the 36-month reservation timeline, the applicant must provide proof of tax credit approval upon submission of the pre-application.
c. Consumers Energy will work with MSHDA to get connected with tax credit applicants and to obtain a list of applicants allocated tax credits in the current cycle.

**6. Benchmarking**

a. Qualifying customers who have expressed interest in tracking their energy performance will be directed to the Consumers Energy Landlord Portal by program staff. Information about benchmarking and other features of the Landlord portal will be shared with customers.

## Income-Qualified Program Incentives

Multifamily EWR program staff will target low income incentive levels covering 20% (including both equipment and labor) and, averaging 40- 50% of total project cost as follows with the understanding that the level of incentives per building will be flexible depending on the nature of

the savings opportunities in the building, the severity of the barriers faced by the building owner in addressing those opportunities, and subject to overall program management design and operational flexibility. These incentive targets apply to:

a. In-unit measures that reduce tenant-paid utility bills (in-unit electric measures, in-unit DHW system improvements, and/or in-unit heating system where tenants are paying for heat); and
b. Envelope measures or for measures that reduce owner-paid utility bills (common area, central building systems, or in unit owner-paid building systems, as well as in-unit measures in master-metered buildings).

**Data / Reporting Commitments**

The reporting listed below will be included in the EWR Annual Report, filed with the Company's annual EWR Reconciliation. The Company will also provide a multifamily program status update to interested parties in biannual update meetings and at the EWR Collaborative, EWR Low-Income Workgroup, and/or the Energy Affordability and Accessibility Collaborative at least once a year (as noted in paragraph 28 of the Settlement Agreement). Consumers Energy will also meet with interested stakeholders in Q3 or Q4 2022 to assess and potentially update this list of reporting items.

Property Level Data

- # of properties, buildings and units served – for a single property all savings and measures will be reported together
- # of properties that received benchmarking services from the Landlord Portal
- # of properties that received an energy assessment from the program
- # of properties that received an ASHRAE Level 2 Audit
- # of properties that installed 2 or more prescriptive or custom measures
- # of Subsidized and Unsubsidized properties participating: In order to have the ability to track subsidized and unsubsidized properties served, a check box will be added to the application where the customer will self-identify property type (beginning in 2023)
- # of Rent vs. Own properties participating: In order to have the ability to track Rent vs. Own status, a check box will be added to the application where the customer will self-identify this information (beginning in 2023)
- Overall conversion rate: what % of projects moved from assessment/direct install to prescriptive/custom

Measure Level Data

- # of properties reported above that received incentives in the following categories:
    - HVAC
    - Insulation
    - Lighting
    - Domestic Hot Water
    - Custom

- Total # of installations, in the properties reported above, for each DI measure
- # of properties that participated only in DI
- # of properties that received only prescriptive or custom incentives
- # of properties that received both direct install and prescriptive and/or custom incentives

Investment Data

- Total incentive spending (by fuel)
- Total non-incentive spending (by fuel)
- Incentives as a portion of total actual or estimated project cost (including both materials and labor)
    - For direct install (assume 100% covered)
    - For prescriptive/custom
    - Overall (direct install and prescriptive/custom)
    - Average % of project total cost covered by incentives (exclusive of direct install)

Savings Data

- MWh savings achieved in paid installations
- Mcf savings achieved in paid installations

Marketing and Outreach

- Information on Multifamily Low-Income collaboration efforts, presented in coordination with DTE Energy
- Collaboration with MSHDA
- Total properties contacted
- Coordination with energy assistance programs

# ATTACHMENT C

Consumers Energy - Energy Waste Reduction Program
2022 - 2025 Energy Efficiency Plan Performance Metrics
Electric Service

| Line No. | Performance Metric | Description | Weight | | Year | Performance Requirements Minimum | Performance Requirements Maximum | Financial Incentive (1)(2) (% of Investment) Minimum | Financial Incentive (1)(2) (% of Investment) Maximum | Explanation |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Lifetime Energy Savings | Lifetime MWh savings for exceeding 1.0% annual reduction (based on a sliding scale) | 80.00% | | 2022 | 2,969,555 MWh | 5,939,110 MWh | 12.00% | 16.00% | Incentive to promote long life measures. |
| | | | | | 2023 | 2,987,823 MWh | 5,975,646 MWh | | | |
| | | | | | 2024 | 2,996,376 MWh | 5,992,752 MWh | | | |
| | | | | | 2025 | 2,991,974 MWh | 5,983,949 MWh | | | |
| 2 | Low Income Investment(3) | Investment in low income programs | 12.50% | IQ | 2022 | $ 8,160,000 | $ 9,600,000 | 1.50% | 2.50% | Incentive to promote investing in energy savings measures for low-income customers. |
| | | | | MF | 2022 | $ 7,990,000 | $ 9,400,000 | | | |
| | | | | IQ | 2023 | $ 8,160,000 | $ 9,600,000 | | | |
| | | | | MF | 2023 | $ 9,095,000 | $ 10,700,000 | | | |
| | | | | IQ | 2024 | $ 9,010,000 | $ 10,600,000 | | | |
| | | | | MF | 2024 | $ 10,030,000 | $ 11,800,000 | | | |
| | | | | IQ | 2025 | $ 9,350,000 | $ 11,000,000 | | | |
| | | | | MF | 2025 | $ 10,710,000 | $ 12,600,000 | | | |
| 3 | Low Income Targeted Measures (4) | Installations of Targeted Measures for income qualified customers. | 12.50% | | 2022 | 3,020 | 4,530 | 1.50% | 2.50% | Promotes adoption of an energy efficient primary heat source for income qualified customers. |
| | | | | | 2023 | 4,087 | 6,131 | | | |
| | | | | | 2024 | 5,154 | 7,731 | | | |
| | | | | | 2025 | 6,221 | 9,332 | | | |

Notes:
( 1 ) Eligibility to earn financial incentives is determined first by demonstrating achievement of the annual incremental savings thresholds established in Section 75 of Public Act 342 of 2016.
( 2 ) Financial incentive is based on sliding scale between minimum and maximum caps. Total not to exceed 100% of the financial incentive cap of 20%.
( 3 ) Separate low-income single and multifamily program budgets are targets. Financial incentive is based on the combined total spend.
( 4 ) Targeted measures are defined as cold climate heat pump, heat pump hot water heater, air sealing (20%, 30%, 40%, 50%), above grade wall insulation, attic insulation, basement wall insulation, crawlspace insulation, floor insulation, kneewall insulation or rim joist insulation. Electrically heated single family or multifamily buildings with air-conditioning or non-Consumers fossil fuel heat (gas or propane) and air-conditioning. All measures counted separately. Insulation and air sealing measures in terms of 1000 sq ft. Count of multifamily housing units affected towards target, e.g. a 20-unit building that gets both central heating system replacement and attic insulation counts as 40 measures.
( 5 ) For 2023 and beyond minimum will be based on the higher of actuals and listed minimum targets.

| Consumers Energy - Energy Waste Reduction Program | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Recommended Financial Incentive Structure for Electric | | | | | | | | | | | | |
| Legislative First Year Savings Tiers | | | Metric 1: Lifetime Savings (MWh) | | | Metric 2: Low Income Investment ($1,000) | | | Metric 3: Low Income Targeted Measure Installations | | | |
| | | | Minimum Basis (100%)<br>Year 2022 = 2,969,555<br>Year 2023 = 2,987,823<br>Year 2024 = 2,996,376<br>Year 2025 = 2,991,974 | | | Minimum Basis (85%)<br>Year 2022 = $16,150<br>Year 2023 = $17,255<br>Year 2024 = $19,040<br>Year 2025 = $20,060 | | | Min Basis (100%) to Max Basis (150%)<br>Year 2022 = 3,020 - 4,530<br>Year 2023 = 4,087 - 6,131<br>Year 2024 = 5,154 - 7,731<br>Year 2025 = 6,221 - 9,332 | | |
| | | | *Savings weighted at 80%* | | | *Weighted at 12.5%* | | | *Weighted at 12.5%* | | |
| | *% Savings* | *% Incentive* | | *Weight* | *% Incentive* | | *Weight* | *% Incentive* | | *Weight* | *% Incentive* |
| *Tier 1* | 1.00% | 15.00% | *Tier 1* | 100% | 12.00% | *Tier 1* | 85.00% | 1.50% | *Tier 1* | 100% | 1.50% |
| | 1.01% | 15.00% | | 102% | 12.08% | | 85.30% | 1.52% | | 101% | 1.52% |
| | 1.02% | 15.00% | | 104% | 12.16% | | 85.60% | 1.54% | | 102% | 1.54% |
| | 1.03% | 15.00% | | 106% | 12.24% | | 85.90% | 1.56% | | 103% | 1.56% |
| | 1.04% | 15.00% | | 108% | 12.32% | | 86.20% | 1.58% | | 104% | 1.58% |
| | 1.05% | 15.00% | | 110% | 12.40% | | 86.50% | 1.60% | | 105% | 1.60% |
| | 1.06% | 15.00% | | 112% | 12.48% | | 86.80% | 1.62% | | 106% | 1.62% |
| | 1.07% | 15.00% | | 114% | 12.56% | | 87.10% | 1.64% | | 107% | 1.64% |
| | 1.08% | 15.00% | | 116% | 12.64% | | 87.40% | 1.66% | | 108% | 1.66% |
| | 1.09% | 15.00% | | 118% | 12.72% | | 87.70% | 1.68% | | 109% | 1.68% |
| | 1.10% | 15.00% | | 120% | 12.80% | | 88.00% | 1.70% | | 110% | 1.70% |
| | 1.11% | 15.00% | | 122% | 12.88% | | 88.30% | 1.72% | | 111% | 1.72% |
| | 1.12% | 15.00% | | 124% | 12.96% | | 88.60% | 1.74% | | 112% | 1.74% |
| | 1.13% | 15.00% | | 126% | 13.04% | | 88.90% | 1.76% | | 113% | 1.76% |
| | 1.14% | 15.00% | | 128% | 13.12% | | 89.20% | 1.78% | | 114% | 1.78% |
| | 1.15% | 15.00% | | 130% | 13.20% | | 89.50% | 1.80% | | 115% | 1.80% |
| | 1.16% | 15.00% | | 132% | 13.28% | | 89.80% | 1.82% | | 116% | 1.82% |
| | 1.17% | 15.00% | | 134% | 13.36% | | 90.10% | 1.84% | | 117% | 1.84% |
| | 1.18% | 15.00% | | 136% | 13.44% | | 90.40% | 1.86% | | 118% | 1.86% |
| | 1.19% | 15.00% | | 138% | 13.52% | | 90.70% | 1.88% | | 119% | 1.88% |
| | 1.20% | 15.00% | | 140% | 13.60% | | 91.00% | 1.90% | | 120% | 1.90% |
| | 1.21% | 15.00% | | 142% | 13.68% | | 91.30% | 1.92% | | 121% | 1.92% |
| | 1.22% | 15.00% | | 144% | 13.76% | | 91.60% | 1.94% | | 122% | 1.94% |
| | 1.23% | 15.00% | | 146% | 13.84% | | 91.90% | 1.96% | | 123% | 1.96% |
| | 1.24% | 15.00% | | 148% | 13.92% | | 92.20% | 1.98% | | 124% | 1.98% |
| *Tier 2* | 1.25% | 17.50% | *Tier 2* | 150% | 14.00% | *Tier 2* | 92.50% | 2.00% | *Tier 2* | 125% | 2.00% |
| | 1.26% | 17.50% | | 152% | 14.08% | | 92.80% | 2.02% | | 126% | 2.02% |
| | 1.27% | 17.50% | | 154% | 14.16% | | 93.10% | 2.04% | | 127% | 2.04% |
| | 1.28% | 17.50% | | 156% | 14.24% | | 93.40% | 2.06% | | 128% | 2.06% |
| | 1.29% | 17.50% | | 158% | 14.32% | | 93.70% | 2.08% | | 129% | 2.08% |
| | 1.30% | 17.50% | | 160% | 14.40% | | 94.00% | 2.10% | | 130% | 2.10% |
| | 1.31% | 17.50% | | 162% | 14.48% | | 94.30% | 2.12% | | 131% | 2.12% |
| | 1.32% | 17.50% | | 164% | 14.56% | | 94.60% | 2.14% | | 132% | 2.14% |
| | 1.33% | 17.50% | | 166% | 14.64% | | 94.90% | 2.16% | | 133% | 2.16% |
| | 1.34% | 17.50% | | 168% | 14.72% | | 95.20% | 2.18% | | 134% | 2.18% |
| | 1.35% | 17.50% | | 170% | 14.80% | | 95.50% | 2.20% | | 135% | 2.20% |
| | 1.36% | 17.50% | | 172% | 14.88% | | 95.80% | 2.22% | | 136% | 2.22% |
| | 1.37% | 17.50% | | 174% | 14.96% | | 96.10% | 2.24% | | 137% | 2.24% |
| | 1.38% | 17.50% | | 176% | 15.04% | | 96.40% | 2.26% | | 138% | 2.26% |
| | 1.39% | 17.50% | | 178% | 15.12% | | 96.70% | 2.28% | | 139% | 2.28% |
| | 1.40% | 17.50% | | 180% | 15.20% | | 97.00% | 2.30% | | 140% | 2.30% |
| | 1.41% | 17.50% | | 182% | 15.28% | | 97.30% | 2.32% | | 141% | 2.32% |
| | 1.42% | 17.50% | | 184% | 15.36% | | 97.60% | 2.34% | | 142% | 2.34% |
| | 1.43% | 17.50% | | 186% | 15.44% | | 97.90% | 2.36% | | 143% | 2.36% |
| | 1.44% | 17.50% | | 188% | 15.52% | | 98.20% | 2.38% | | 144% | 2.38% |
| | 1.45% | 17.50% | | 190% | 15.60% | | 98.50% | 2.40% | | 145% | 2.40% |
| | 1.46% | 17.50% | | 192% | 15.68% | | 98.80% | 2.42% | | 146% | 2.42% |
| | 1.47% | 17.50% | | 194% | 15.76% | | 99.10% | 2.44% | | 147% | 2.44% |
| | 1.48% | 17.50% | | 196% | 15.84% | | 99.40% | 2.46% | | 148% | 2.46% |
| | 1.49% | 17.50% | | 198% | 15.92% | | 99.70% | 2.48% | | 149% | 2.48% |
| *Tier 3* | **1.50%** | **20.00%** | *Tier 3* | 200% | **16.00%** | *Tier 3* | 100.00% | **2.50%** | *Tier 3* | **150%** | **2.50%** |

Note: The financial incentive is the minimum of the first year savings incentive or total metric incentive calculated by adding up the percentages earned in each of the 2 metrics. The total incentive award can not exceed the award based on the Company's 1st year energy savings achieved. (Financial incentive payment can not exceed 20% of program spend, or 30% of net benefits.

Consumers Energy - Energy Waste Reduction Program
2022 - 2025 Energy Efficiency Plan Performance Metrics
Gas Service

| Line No. | Performance Metric | Description | Weight | | Year | Performance Requirements Minimum | Performance Requirements Maximum | Financial Incentive [1][2] (% of Investment) Minimum | Financial Incentive [1][2] (% of Investment) Maximum | Explanation |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Lifetime Energy Savings | Lifetime Mcf savings for exceeding 0.75% annual reduction (based on a sliding scale). | 80.00% | | 2022 | 24,288,537 Mcf | 32,384,708 Mcf | 12.00% | 16.00% | Incentive to promote long life measures. |
| | | | | | 2023 | 24,337,355 Mcf | 32,449,798 Mcf | | | |
| | | | | | 2024 | 24,343,431 Mcf | 32,457,899 Mcf | | | |
| | | | | | 2025 | 24,366,016 Mcf | 32,488,014 Mcf | | | |
| 2 | Low Income Investment[3] | Investment in low income programs. | 10.00% | IQ | 2022 | $ 13,387,500 | $ 15,750,000 | 1.20% | 2.00% | Incentive to promote investing in energy savings measures for low-income customers. |
| | | | | MF | 2022 | $ 6,630,000 | $ 7,800,000 | | | |
| | | | | IQ | 2023 | $ 14,875,000 | $ 17,500,000 | | | |
| | | | | MF | 2023 | $ 7,650,000 | $ 9,000,000 | | | |
| | | | | IQ | 2024 | $ 17,000,000 | $ 20,000,000 | | | |
| | | | | MF | 2024 | $ 8,925,000 | $ 10,500,000 | | | |
| | | | | IQ | 2025 | $ 18,700,000 | $ 22,000,000 | | | |
| | | | | MF | 2025 | $ 8,925,000 | $ 10,500,000 | | | |
| 3 | Low Income Targeted Measures Installed[4][5] | Number of premium measures installed for income qualified. | 15.00% | | 2022 | 4,794 | 7,191 | 1.80% | 3.00% | Incentive to promote installation of targeted measures in single and multifamily income qualified units. |
| | | | | | 2023 | 6,016 | 9,024 | | | |
| | | | | | 2024 | 10,365 | 15,547 | | | |
| | | | | | 2025 | 12,900 | 19,350 | | | |

Notes:
( 1 ) Eligibility to earn financial incentives is determined first by demonstrating achievement of the annual incremental savings thresholds established in Section 75 of Public Act 342 of 2016.
( 2 ) Financial incentive is based on sliding scale between minimum and maximum caps. Total not to exceed 100% of the financial incentive cap of 20%.
( 3 ) Separate low income single and multifamily program budgets are targets. Financial incentive is based on the combined total spend.

( 4 ) Targeted measures are defined as air sealing 20%, air sealing 30%, air sealing 40%, air sealing 50%, above grade wall insulation, attic insulation, basement wall insulation, crawlspace insulation, floor insulation, kneewall insulation or rim joist insulation with all measures counted separately. Maximum of one air sealing measure per housing unit can be counted. Insulation and air sealing measures in terms of 1000 sq ft. Count number of multifamily housing units affected towards target, e.g. a 20-unit building that gets both air sealing and attic installation counts as 40 measures.

( 5 ) For 2023 and beyond minimum will be based on the higher of actuals and listed miminum targets, and the maximum is 1.5 times minimum.

| Consumers Energy - Energy Waste Reduction Program | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Recommended Financial Incentive Structure for Gas | | | | | | | | | | | | |
| Legislative First Year Savings Tiers | | | Metric 1: Lifetime Savings (MCF) | | | Metric 2: Low Income Investment - ($1,000) | | | Metric 3: Number Low Income Targeted Measures Installed | | | |
| | | | Minimum Basis (100%)<br>Year 2022 = 24,288,537<br>Year 2023 = 24,337,355<br>Year 2024 = 24,343,431<br>Year 2025 = 24,366,016 | | | Minimum Basis (85%)<br>Year 2022 = $20,018<br>Year 2023 = $22,525<br>Year 2024 = $25,925<br>Year 2025 = $27,625 | | | Min Basis (100%) to Max Basis (150%)<br>Year 2022 = 4,794 - 7,191<br>Year 2023 = 6,016 - 9,024<br>Year 2024 = 10,365 - 15,547<br>Year 2025 = 12,900 - 19,350 | | |
| | | | *Savings weighted at 80%* | | | *Weighted at 10%* | | | *Weighted at 15%* | | |
| | *% Savings* | *Incentive Cap* | | *Weight* | *Incentive Cap* | | *Weight* | *Incentive Cap* | | *Weight* | *Incentive Cap* |
| ***Tier 1*** | **0.750%** | **15.00%** | ***Tier 1*** | 100.0% | 12.00% | ***Tier 1*** | 85.0% | 1.200% | ***Tier 1*** | 100.0% | 1.800% |
| | 0.755% | 15.00% | | 100.7% | 12.08% | | 85.3% | 1.216% | | 101.0% | 1.824% |
| | 0.760% | 15.00% | | 101.3% | 12.16% | | 85.6% | 1.232% | | 102.0% | 1.848% |
| | 0.765% | 15.00% | | 102.0% | 12.24% | | 85.9% | 1.248% | | 103.0% | 1.872% |
| | 0.770% | 15.00% | | 102.7% | 12.32% | | 86.2% | 1.264% | | 104.0% | 1.896% |
| | 0.775% | 15.00% | | 103.3% | 12.40% | | 86.5% | 1.280% | | 105.0% | 1.920% |
| | 0.780% | 15.00% | | 104.0% | 12.48% | | 86.8% | 1.296% | | 106.0% | 1.944% |
| | 0.785% | 15.00% | | 104.7% | 12.56% | | 87.1% | 1.312% | | 107.0% | 1.968% |
| | 0.790% | 15.00% | | 105.3% | 12.64% | | 87.4% | 1.328% | | 108.0% | 1.992% |
| | 0.795% | 15.00% | | 106.0% | 12.72% | | 87.7% | 1.344% | | 109.0% | 2.016% |
| | 0.800% | 15.00% | | 106.7% | 12.80% | | 88.0% | 1.360% | | 110.0% | 2.040% |
| | 0.805% | 15.00% | | 107.3% | 12.88% | | 88.3% | 1.376% | | 111.0% | 2.064% |
| | 0.810% | 15.00% | | 108.0% | 12.96% | | 88.6% | 1.392% | | 112.0% | 2.088% |
| | 0.815% | 15.00% | | 108.7% | 13.04% | | 88.9% | 1.408% | | 113.0% | 2.112% |
| | 0.820% | 15.00% | | 109.3% | 13.12% | | 89.2% | 1.424% | | 114.0% | 2.136% |
| | 0.825% | 15.00% | | 110.0% | 13.20% | | 89.5% | 1.440% | | 115.0% | 2.160% |
| | 0.830% | 15.00% | | 110.7% | 13.28% | | 89.8% | 1.456% | | 116.0% | 2.184% |
| | 0.835% | 15.00% | | 111.3% | 13.36% | | 90.1% | 1.472% | | 117.0% | 2.208% |
| | 0.840% | 15.00% | | 112.0% | 13.44% | | 90.4% | 1.488% | | 118.0% | 2.232% |
| | 0.845% | 15.00% | | 112.7% | 13.52% | | 90.7% | 1.504% | | 119.0% | 2.256% |
| | 0.850% | 15.00% | | 113.3% | 13.60% | | 91.0% | 1.520% | | 120.0% | 2.280% |
| | 0.855% | 15.00% | | 114.0% | 13.68% | | 91.3% | 1.536% | | 121.0% | 2.304% |
| | 0.860% | 15.00% | | 114.7% | 13.76% | | 91.6% | 1.552% | | 122.0% | 2.328% |
| | 0.865% | 15.00% | | 115.3% | 13.84% | | 91.9% | 1.568% | | 123.0% | 2.352% |
| | 0.870% | 15.00% | | 116.0% | 13.92% | | 92.2% | 1.584% | | 124.0% | 2.376% |
| ***Tier 2*** | **0.875%** | **17.50%** | ***Tier 2*** | 116.7% | 14.00% | ***Tier 2*** | 92.5% | 1.600% | ***Tier 2*** | 125.0% | 2.400% |
| | 0.880% | 17.50% | | 117.3% | 14.08% | | 92.8% | 1.616% | | 126.0% | 2.424% |
| | 0.885% | 17.50% | | 118.0% | 14.16% | | 93.1% | 1.632% | | 127.0% | 2.448% |
| | 0.890% | 17.50% | | 118.7% | 14.24% | | 93.4% | 1.648% | | 128.0% | 2.472% |
| | 0.895% | 17.50% | | 119.3% | 14.32% | | 93.7% | 1.664% | | 129.0% | 2.496% |
| | 0.900% | 17.50% | | 120.0% | 14.40% | | 94.0% | 1.680% | | 130.0% | 2.520% |
| | 0.905% | 17.50% | | 120.7% | 14.48% | | 94.3% | 1.696% | | 131.0% | 2.544% |
| | 0.910% | 17.50% | | 121.3% | 14.56% | | 94.6% | 1.712% | | 132.0% | 2.568% |
| | 0.915% | 17.50% | | 122.0% | 14.64% | | 94.9% | 1.728% | | 133.0% | 2.592% |
| | 0.920% | 17.50% | | 122.7% | 14.72% | | 95.2% | 1.744% | | 134.0% | 2.616% |
| | 0.925% | 17.50% | | 123.3% | 14.80% | | 95.5% | 1.760% | | 135.0% | 2.640% |
| | 0.930% | 17.50% | | 124.0% | 14.88% | | 95.8% | 1.776% | | 136.0% | 2.664% |
| | 0.935% | 17.50% | | 124.7% | 14.96% | | 96.1% | 1.792% | | 137.0% | 2.688% |
| | 0.940% | 17.50% | | 125.3% | 15.14% | | 96.4% | 1.808% | | 138.0% | 2.712% |
| | 0.945% | 17.50% | | 126.0% | 15.12% | | 96.7% | 1.824% | | 139.0% | 2.736% |
| | 0.950% | 17.50% | | 126.7% | 15.20% | | 97.0% | 1.840% | | 140.0% | 2.760% |
| | 0.955% | 17.50% | | 127.3% | 15.28% | | 97.3% | 1.856% | | 141.0% | 2.784% |
| | 0.960% | 17.50% | | 128.0% | 15.36% | | 97.6% | 1.872% | | 142.0% | 2.808% |
| | 0.965% | 17.50% | | 128.7% | 15.44% | | 97.9% | 1.888% | | 143.0% | 2.832% |
| | 0.970% | 17.50% | | 129.3% | 15.52% | | 98.2% | 1.904% | | 144.0% | 2.856% |
| | 0.975% | 17.50% | | 130.0% | 15.60% | | 98.5% | 1.920% | | 145.0% | 2.880% |
| | 0.980% | 17.50% | | 130.7% | 15.68% | | 98.8% | 1.936% | | 146.0% | 2.904% |
| | 0.985% | 17.50% | | 131.3% | 15.76% | | 99.1% | 1.952% | | 147.0% | 2.928% |
| | 0.990% | 17.50% | | 132.0% | 15.84% | | 99.4% | 1.968% | | 148.0% | 2.952% |
| | 0.995% | 17.50% | | 132.7% | 15.92% | | 99.7% | 1.984% | | 149.0% | 2.976% |
| ***Tier 3*** | **1.000%** | **20.00%** | ***Tier 3*** | **133.3%** | **16.00%** | ***Tier 3*** | 100.0% | **2.000%** | ***Tier 3*** | **150.0%** | **3.000%** |

Note: The financial incentive is the minimum of the first year savings incentive or total metric incentive calculated by adding up the percentages earned in each of the 2 metrics. The total incentive award can not exceed the award based on the Company's 1st year energy savings achieved. (Financial incentive payment

# ATTACHMENT D

Calculation of Annual Energy Savings Targets
Electric Service (Megawatt-hours)

| Line No. | Description | ( a ) 2020 | ( b ) 2021 | ( c ) 2022 | ( d ) 2023 | ( e ) 2024 | ( f ) 2025 |
|---|---|---|---|---|---|---|---|
| 1 | Retail Electric Sales | 31,176,139 | 31,258,475 | 31,450,768 | 31,540,801 | 31,494,467 | 31,108,874 |
| 2 | Prior Year Weather Normal Sales | | 31,176,139 | 31,258,475 | 31,450,768 | 31,540,801 | 31,494,467 |
| 3 | Electric Statutory Savings Percentage | | 1.0% | 1.0% | 1.0% | 1.0% | 1.0% |
| 4 | Electric Statutory Savings Target | | 311,761 | 312,585 | 314,508 | 315,408 | 314,945 |

Calculation of Annual Energy Savings Targets
Gas Service (Thousand Cubic Feet)

| | | ( a ) | ( b ) | ( c ) | ( d ) | ( e ) | ( f ) |
|---|---|---|---|---|---|---|---|
| Line No. | Description | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
| 1 | Retail Gas Sales Sales [1] | 299,859,000 | 302,405,459 | 304,476,425 | 304,547,487 | 304,811,649 | 304,757,885 |
| 2 | Electric Generation Gas Sales [2] | 14,070,000 | 18,329,000 | 19,829,000 | 19,829,000 | 19,829,000 | 19,829,000 |
| 3 | Total Adjusted Gas Sales | 285,789,000 | 284,076,459 | 284,647,425 | 284,718,487 | 284,982,649 | 284,928,885 |
| 2 | Prior Year Weather Normal Sales | | 285,789,000 | 284,076,459 | 284,647,425 | 284,718,487 | 284,982,649 |
| 4 | Gas Statutory Savings Percentage | | 0.75% | 0.75% | 0.75% | 0.75% | 0.75% |
| 5 | Gas Statutory Savings Target | | 2,143,418 | 2,130,573 | 2,134,856 | 2,135,389 | 2,137,370 |

| Line No. | Description | Investments 2022 ($) | Investments 2023 ($) | Investments 2024 ($) | Investments 2025 ($) | First Year Energy Savings 2022 (MWh) | First Year Energy Savings 2023 (MWh) | First Year Energy Savings 2024 (MWh) | First Year Energy Savings 2025 (MWh) | Lifetime Energy Savings 2022 (MWh) | Lifetime Energy Savings 2023 (MWh) | Lifetime Energy Savings 2024 (MWh) | Lifetime Energy Savings 2025 (MWh) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ***Residential Class*** | | | | | | | | | | | | |
| 1 | Appliance Recycling | $ 8,059,748 | $ 8,899,257 | $ 8,765,432 | $ 9,033,576 | 34,075 | 34,951 | 35,190 | 35,950 | 273,609 | 280,904 | 283,796 | 290,444 |
| 2 | Energy Dashboard | 558,459 | 768,326 | 733,462 | 765,268 | 11,558 | 13,291 | 14,886 | 16,673 | 11,558 | 13,291 | 14,886 | 16,673 |
| 3 | ENERGY STAR Appliances | 844,438 | 879,947 | 908,292 | 968,289 | 2,802 | 2,978 | 3,004 | 3,198 | 26,706 | 28,377 | 28,552 | 30,387 |
| 4 | ENERGY STAR Lighting | 4,557,328 | 4,610,374 | 3,516,134 | 3,064,784 | 22,653 | 20,058 | 8,875 | 3,924 | 95,363 | 84,441 | 28,486 | 8,671 |
| 5 | Home Energy Analysis | 4,721,709 | 4,799,354 | 4,590,772 | 3,026,806 | 3,775 | 3,265 | 2,491 | 2,074 | 26,628 | 24,118 | 19,388 | 17,105 |
| 6 | Home Energy Reports | 1,146,839 | 1,080,817 | 2,130,956 | 1,991,929 | 15,255 | 14,975 | 16,603 | 16,307 | 15,255 | 14,975 | 16,603 | 16,307 |
| 8 | HVAC and Water Heating | 2,540,836 | 2,778,654 | 2,930,723 | 3,151,388 | 3,167 | 3,065 | 3,396 | 3,884 | 39,874 | 37,636 | 41,735 | 47,933 |
| 7 | Home Performance with ENERGY STAR | 469,226 | 519,963 | 535,146 | 552,313 | 251 | 255 | 258 | 261 | 4,027 | 4,095 | 4,148 | 4,202 |
| 9 | Income-Qualified Energy Assistance | 9,600,000 | 9,600,000 | 10,600,000 | 11,000,000 | 21,787 | 21,955 | 20,145 | 18,691 | 190,590 | 191,694 | 190,825 | 184,605 |
| 10 | Income-Qualified Multifamily | 9,400,000 | 10,700,000 | 11,800,000 | 12,600,000 | 10,985 | 10,985 | 10,981 | 10,978 | 124,691 | 124,662 | 124,023 | 123,408 |
| 11 | Insulation & Windows | 706,955 | 727,787 | 748,154 | 774,526 | 600 | 603 | 607 | 615 | 14,606 | 14,673 | 14,775 | 14,951 |
| 12 | Residential New Construction | 643,822 | 666,027 | 837,570 | 1,054,315 | F 1,421 | 1,629 | 1,839 | 2,077 | 27,285 | 31,388 | 35,486 | 40,123 |
| 12 | Residential Marketplace | 1,000,062 | 1,047,198 | 1,075,939 | 1,128,079 | 3,106 | 3,270 | 3,434 | 3,602 | 27,927 | 29,376 | 30,849 | 32,342 |
| 13 | Residential Multifamily | 2,743,143 | 2,758,101 | 2,753,216 | 2,763,436 | 2,839 | 2,920 | 2,991 | 3,076 | 30,903 | 32,160 | 32,878 | 33,816 |
| 13 | Residential Agriculture | 766,804 | 779,931 | 789,233 | 802,951 | 874 | 874 | 874 | 874 | 12,936 | 12,936 | 12,936 | 12,936 |
| 14 | Think! Energy | 1,338,699 | 1,394,342 | 1,354,704 | 1,349,329 | 4,830 | 4,967 | 4,812 | 4,762 | 32,221 | 33,158 | 32,382 | 32,775 |
| 15 | Residential Pilot Programs[1] | 3,685,107 | 3,890,447 | 4,027,486 | 4,032,225 | 9,229 | 9,234 | 8,597 | 8,370 | 62,943 | 63,157 | 60,094 | 59,762 |
| 16 | *Residential Subtotal* | *$ 52,783,176* | *$ 55,900,527* | *$ 58,097,219* | *$ 58,059,215* | *149,205* | *149,275* | *138,987* | *135,315* | *1,017,121* | *1,021,041* | *971,842* | *966,436* |
| | ***Business Class*** | | | | | | | | | | | | |
| 17 | Comprehensive Business Solutions | $ 81,178,149 | $ 83,989,188 | $ 85,129,553 | $ 86,905,388 | 383,745 | 392,473 | 405,863 | 413,414 | 4,755,736 | 4,939,624 | 5,159,632 | 5,273,125 |
| 18 | Small Business Solutions | 18,824,165 | 19,716,341 | 20,304,838 | 21,203,625 | 63,430 | 64,569 | 65,762 | 67,003 | 745,311 | 765,471 | 779,619 | 795,073 |
| 19 | Business Multifamily | 1,175,707 | 1,191,048 | 1,185,319 | 1,191,432 | 2,541 | 2,533 | 2,500 | 2,466 | 28,760 | 28,775 | 28,312 | 27,856 |
| 20 | Business Pilot Programs[1] | 7,518,621 | 7,789,227 | 7,928,266 | 8,130,444 | 29,652 | 30,302 | 31,261 | 31,838 | 364,603 | 378,057 | 393,466 | 401,938 |
| 21 | *Business Subtotal* | *$ 108,696,642* | *$ 112,685,803* | *$ 114,547,977* | *$ 117,430,889* | *479,367* | *489,877* | *505,385* | *514,721* | *5,894,409* | *6,111,926* | *6,361,029* | *6,497,992* |
| | ***Support Services*** | | | | | | | | | | | | |
| 22 | Utility Oversight | $ 11,175,167 | $ 11,510,422 | $ 11,845,677 | $ 12,180,932 | - | - | - | - | - | - | - | - |
| 23 | Tracking System | 1,294,778 | 1,333,621 | 1,372,465 | 1,411,308 | - | - | - | - | - | - | - | - |
| 24 | Education and Awareness[1] | 5,544,217 | 5,839,837 | 5,977,876 | 6,081,335 | 19,440 | 19,768 | 19,929 | 20,104 | 213,758 | 220,607 | 226,790 | 230,859 |
| 25 | EM&V | 7,498,055 | 7,722,996 | 7,947,938 | 8,172,880 | - | - | - | - | - | - | - | - |
| 26 | *Support Services Subtotal* | *$ 25,512,217* | *$ 26,406,877* | *$ 27,143,956* | *$ 27,846,455* | *19,440* | *19,768* | *19,929* | *20,104* | *213,758* | *220,607* | *226,790* | *230,859* |
| 27 | ***Total Energy Efficiency Portfolio*** | **$ 186,992,035** | **$ 194,993,207** | **$ 199,789,153** | **$ 203,336,558** | ***648,013*** | ***658,919*** | ***664,301*** | ***670,141*** | ***7,125,288*** | ***7,353,575*** | ***7,559,662*** | ***7,695,287*** |

(1) Lifetime savings for Pilots and Education & Awareness, for the Plan and Reconciliation filings, is based on first year savings multiplied by the average program measure life.

| Line No. | Description | Investments 2022 ($) | Investments 2023 ($) | Investments 2024 ($) | Investments 2025 ($) | First Year Energy Savings 2022 (Mcf) | First Year Energy Savings 2023 (Mcf) | First Year Energy Savings 2024 (Mcf) | First Year Energy Savings 2025 (Mcf) | Lifetime Energy Savings 2022 (Mcf) | Lifetime Energy Savings 2023 (Mcf) | Lifetime Energy Savings 2024 (Mcf) | Lifetime Energy Savings 2025 (Mcf) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ***Residential Class*** | | | | | | | | | | | | |
| 1 | Appliance Recycling | $ - | $ - | $ - | $ - | - | - | - | - | - | - | - | - |
| 2 | Energy Dashboard | 325,726 | 504,353 | 503,650 | 504,240 | 5,687 | 6,540 | 7,324 | 8,203 | 5,687 | 6,540 | 7,324 | 8,203 |
| 3 | ENERGY STAR Appliances | 761,749 | 798,477 | 832,885 | 856,332 | 34,717 | 35,989 | 37,893 | 37,857 | 318,204 | 329,999 | 347,515 | 347,610 |
| 4 | ENERGY STAR Lighting | - | - | - | - | - | - | - | - | - | - | - | - |
| 5 | Home Energy Analysis | 2,106,755 | 2,106,322 | 2,105,727 | 2,128,267 | 79,575 | 70,740 | 64,113 | 59,143 | 872,457 | 792,940 | 733,302 | 688,574 |
| 6 | Home Energy Reports | 1,098,205 | 2,306,545 | 1,978,447 | 1,905,269 | 156,845 | 171,946 | 156,288 | 174,111 | 156,845 | 171,946 | 156,288 | 174,111 |
| 7 | Residential Pilot Programs[1] | 10,555,196 | 10,882,865 | 11,136,398 | 11,491,502 | 541,752 | 553,119 | 566,576 | 579,781 | 7,752,205 | 7,921,591 | 8,122,874 | 8,313,819 |
| 8 | Home Performance with ENERGY STAR | 869,616 | 892,710 | 910,704 | 935,006 | 28,871 | 29,448 | 30,037 | 30,638 | 478,185 | 487,749 | 497,504 | 507,454 |
| 9 | Income-Qualified Energy Assistance | 15,750,000 | 17,500,000 | 20,000,000 | 22,000,000 | 164,148 | 164,159 | 169,610 | 169,643 | 1,986,588 | 1,986,643 | 2,084,470 | 2,084,635 |
| 10 | Income-Qualified Multifamily | 7,800,000 | 9,000,000 | 10,500,000 | 10,500,000 | 98,817 | 98,781 | 99,076 | 99,333 | 991,305 | 971,582 | 1,002,766 | 1,014,294 |
| 11 | Insulation & Windows | 2,145,492 | 2,186,712 | 2,218,648 | 2,280,004 | 56,709 | 57,042 | 57,384 | 58,169 | 1,342,116 | 1,348,777 | 1,355,609 | 1,371,307 |
| 12 | Residential New Construction | 1,199,491 | 1,009,225 | 1,040,312 | 1,069,387 | 54,313 | 59,884 | 61,864 | 62,921 | 1,043,411 | 1,154,628 | 1,192,001 | 1,210,946 |
| 13 | Residential Marketplace | 1,858,569 | 1,922,587 | 1,963,969 | 2,043,401 | 111,170 | 114,869 | 118,569 | 123,226 | 1,001,270 | 1,034,566 | 1,067,862 | 1,109,781 |
| 12 | Residential Multifamily | 1,651,760 | 1,652,437 | 1,633,053 | 1,630,421 | 91,467 | 91,495 | 92,218 | 92,684 | 781,955 | 786,197 | 798,768 | 807,887 |
| 13 | Residential Agriculture | 31,433 | 31,979 | 32,463 | 33,029 | 372 | 372 | 372 | 372 | 4,389 | 4,389 | 4,389 | 4,389 |
| 14 | Think! Energy | 1,040,404 | 1,071,376 | 1,084,421 | 1,125,627 | 109,624 | 114,774 | 120,602 | 127,824 | 721,281 | 747,608 | 778,838 | 822,356 |
| 15 | Residential Pilot Programs[1] | 3,241,545 | 3,537,159 | 3,786,797 | 3,950,077 | 101,147 | 103,461 | 104,303 | 107,071 | 1,150,938 | 1,170,010 | 1,383,675 | 1,217,497 |
| 16 | *Residential Subtotal* | *$ 50,435,941* | *$ 55,402,746* | *$ 59,727,474* | *$ 62,452,562* | *1,635,212* | *1,672,618* | *1,686,228* | *1,730,975* | *18,606,836* | *18,915,163* | *19,533,186* | *19,682,862* |
| | ***Business Class*** | | | | | | | | | | | | |
| 17 | Comprehensive Business Solutions | $ 21,553,073 | $ 21,705,010 | $ 21,706,154 | $ 21,956,517 | 1,205,083 | 1,205,179 | 1,214,635 | 1,226,404 | 17,072,949 | 17,036,684 | 17,140,895 | 17,279,951 |
| 18 | Small Business Solutions | 3,062,632 | 3,142,576 | 3,203,892 | 3,283,895 | 93,710 | 96,235 | 98,759 | 101,284 | 692,163 | 706,590 | 721,017 | 735,444 |
| 19 | Business Multifamily | 850,793 | 908,653 | 850,730 | 852,832 | 65,181 | 67,687 | 64,377 | 63,574 | 498,036 | 503,059 | 489,106 | 480,176 |
| 20 | Business Pilot Programs[1] | 1,782,758 | 1,804,971 | 1,808,380 | 1,833,410 | 89,932 | 90,270 | 90,842 | 91,732 | 1,204,164 | 1,203,055 | 1,209,957 | 1,219,488 |
| 21 | *Business Subtotal* | *$ 27,249,256* | *$ 27,561,210* | *$ 27,569,157* | *$ 27,926,654* | *1,453,906* | *1,459,371* | *1,468,614* | *1,482,993* | *19,467,312* | *19,449,388* | *19,560,976* | *19,715,059* |
| | ***Support Services*** | | | | | | | | | | | | |
| 22 | Utility Oversight | $ 2,256,524 | $ 2,324,220 | $ 2,391,916 | $ 2,459,611 | - | - | - | - | - | - | - | - |
| 23 | Tracking System | 261,446 | 269,289 | 277,132 | 284,976 | - | - | - | - | - | - | - | - |
| 24 | Education and Awareness[1] | 2,512,151 | 2,671,065 | 2,797,589 | 2,891,744 | 95,540 | 96,866 | 97,572 | 99,401 | 1,177,551 | 1,186,533 | 1,203,314 | 1,218,492 |
| 25 | EM&V | 1,514,030 | 1,559,451 | 1,604,872 | 1,650,293 | - | - | - | - | - | - | - | - |
| 26 | *Support Services Subtotal* | *$ 6,544,151* | *$ 6,824,025* | *$ 7,071,509* | *$ 7,286,624* | *95,540* | *96,866* | *97,572* | *99,401* | *1,177,551* | *1,186,533* | *1,203,314* | *1,218,492* |
| 27 | ***Total Energy Efficiency Portfolio*** | ***$ 84,229,348*** | ***$ 89,787,981*** | ***$ 94,368,140*** | ***$ 97,665,840*** | ***3,184,658*** | ***3,228,854*** | ***3,252,414*** | ***3,313,370*** | ***39,251,699*** | ***39,551,084*** | ***40,297,476*** | ***40,616,414*** |

(1) Lifetime savings for Pilots and Education & Awareness, for the Plan and Reconciliation filings, is based on first year savings multiplied by the average program measure life.

# P R O O F  O F  S E R V I C E

STATE OF MICHIGAN )

Case No. U-20875

County of Ingham )

Brianna Brown being duly sworn, deposes and says that on March 17, 2022 A.D. she electronically notified the attached list of this **Commission Order via e-mail transmission**, to the persons as shown on the attached service list (Listserv Distribution List).

Brianna Brown

Subscribed and sworn to before me
this 17th day of March 2022.

Angela P. Sanderson
Notary Public, Shiawassee County, Michigan
As acting in Eaton County
My Commission Expires: May 21, 2024

**Service List for Case: U-20875**

| Name | Email Address |
|---|---|
| Chinyere A. Osuala | cosuala@earthjustice.org |
| Christopher M. Bzdok | chris@envlaw.com |
| Christopher M. Bzdok | chris@envlaw.com |
| Christopher M. Bzdok | chris@envlaw.com |
| Christopher M. Bzdok | chris@envlaw.com |
| Consumers Energy Company 1 of 2 | mpsc.filings@cmsenergy.com |
| Consumers Energy Company 2 of 2 | michael.torrey@cmsenergy.com |
| Gary A. Gensch Jr. | gary.genschjr@cmsenergy.com |
| Heather M.S. Durian | durianh@michigan.gov |
| Holly Hillyer | holly@envlaw.com |
| Holly Hillyer | holly@envlaw.com |
| Holly Hillyer | holly@envlaw.com |
| Holly Hillyer | holly@envlaw.com |
| Kandra Robbins | robbinsk1@michigan.gov |
| Lauren Piette | lpiette@earthjustice.org |
| Lydia Barbash-Riley | lydia@envlaw.com |
| Lydia Barbash-Riley | lydia@envlaw.com |
| Lydia Barbash-Riley | lydia@envlaw.com |
| Lydia Barbash-Riley | lydia@envlaw.com |
| Michael E. Moody | moodym2@michigan.gov |
| Michael J. Pattwell | mpattwell@clarkhill.com |
| Nicholas Q. Taylor | taylorn10@michigan.gov |
| Sharon Feldman | feldmans@michigan.gov |
| Stephen A. Campbell | scampbell@clarkhill.com |
| Theresa A.G. Staley | theresa.staley@cmsenergy.com |

# GEMOTION DISTRIBUTION SERVICE LIST

| | |
|---|---|
| kadarkwa@itctransco.com | ITC |
| sejackinchuk@varnumlaw.com | Energy Michigan |
| awallin@cloverland.com | Cloverland |
| bmalaski@cloverland.com | Cloverland |
| mheise@cloverland.com | Cloverland |
| vobmgr@UP.NET | Village of Baraga |
| braukerL@MICHIGAN.GOV | Linda Brauker |
| info@VILLAGEOFCLINTON.ORG | Village of Clinton |
| jgraham@HOMEWORKS.ORG | Tri-County Electric Co-Op |
| mkappler@HOMEWORKS.ORG | Tri-County Electric Co-Op |
| psimmer@HOMEWORKS.ORG | Tri-County Electric Co-Op |
| frucheyb@DTEENERGY.COM | Citizens Gas Fuel Company |
| mpsc.filings@CMSENERGY.COM | Consumers Energy Company |
| jim.vansickle@SEMCOENERGY.COM | SEMCO Energy Gas Company |
| kay8643990@YAHOO.COM | Superior Energy Company |
| vickie.nugent@wecenergygroup.com | Upper Michigan Energy Resources Corporation |
| jlarsen@uppco.com | Upper Peninsula Power Company |
| estocking@uppco.com | Upper Peninsula Power Company |
| dave.allen@TEAMMIDWEST.COM | Midwest Energy Coop |
| bob.hance@teammidwest.com | Midwest Energy Coop |
| tharrell@ALGERDELTA.COM | Alger Delta Cooperative |
| tanderson@cherrylandelectric.coop | Cherryland Electric Cooperative |
| bscott@GLENERGY.COM | Great Lakes Energy Cooperative |
| sculver@glenergy.com | Great Lakes Energy Cooperative |
| kmarklein@STEPHENSON-MI.COM | Stephenson Utilities Department |
| debbie@ONTOREA.COM | Ontonagon County Rural Elec |
| ddemaestri@PIEG.COM | Presque Isle Electric & Gas Cooperative, INC |
| dbraun@TECMI.COOP | Thumb Electric |
| rbishop@BISHOPENERGY.COM | Bishop Energy |
| mkuchera@AEPENERGY.COM | AEP Energy |
| todd.mortimer@CMSENERGY.COM | CMS Energy |
| igoodman@commerceenergy.com | Just Energy Solutions |
| david.fein@CONSTELLATION.COM | Constellation Energy |
| kate.stanley@CONSTELLATION.COM | Constellation Energy |
| kate.fleche@CONSTELLATION.COM | Constellation New Energy |
| mpscfilings@DTEENERGY.COM | DTE Energy |
| bgorman@FIRSTENERGYCORP.COM | First Energy |
| rarchiba@FOSTEROIL.COM | My Choice Energy |
| greg.bass@calpinesolutions.com | Calpine Energy Solutions |
| rabaey@SES4ENERGY.COM | Santana Energy |
| cborr@WPSCI.COM | Spartan Renewable Energy, Inc. (Wolverine Power Marketing Corp) |
| gpirkola@escanaba.org | City of Escanaba |
| crystalfallsmgr@HOTMAIL.COM | City of Crystal Falls |
| felicel@MICHIGAN.GOV | Lisa Felice |
| mmann@USGANDE.COM | Michigan Gas & Electric |
| mpolega@GLADSTONEMI.COM | City of Gladstone |
| dan@megautilities.org | Integrys Group |
| lrgustafson@CMSENERGY.COM | Lisa Gustafson |

# GEMOTION DISTRIBUTION SERVICE LIST

| | |
|---|---|
| daustin@IGSENERGY.COM | Interstate Gas Supply Inc |
| krichel@DLIB.INFO | Thomas Krichel |
| cityelectric@BAYCITYMI.ORG | Bay City Electric Light & Power |
| jreynolds@MBLP.ORG | Marquette Board of Light & Power |
| bschlansker@PREMIERENERGYLLC.COM | Premier Energy Marketing LLC |
| ttarkiewicz@CITYOFMARSHALL.COM | City of Marshall |
| d.motley@COMCAST.NET | Doug Motley |
| mpauley@GRANGERNET.COM | Marc Pauley |
| ElectricDept@PORTLAND-MICHIGAN.ORG | City of Portland |
| kd@alpenapower.com | Alpena Power |
| dbodine@LIBERTYPOWERCORP.COM | Liberty Power |
| leew@WVPA.COM | Wabash Valley Power |
| tking@WPSCI.COM | Wolverine Power |
| ham557@GMAIL.COM | Lowell S. |
| BusinessOffice@REALGY.COM | Realgy Energy Services |
| jeinstein@volunteerenergy.com | Volunteer Energy Services |
| cmcarthur@HILLSDALEBPU.COM | Hillsdale Board of Public Utilities |
| mrzwiers@INTEGRYSGROUP.COM | Michigan Gas Utilities/Upper Penn Power/Wisconsin |
| Teresa.ringenbach@directenergy.com | Direct Energy |
| christina.crable@directenergy.com | Direct Energy |
| angela.schorr@directenergy.com | Direct Energy |
| ryan.harwell@directenergy.com | Direct Energy |
| johnbistranin@realgy.com | Realgy Corp. |
| kabraham@mpower.org | Katie Abraham, MMEA |
| mgobrien@aep.com | Indiana Michigan Power Company |
| mvorabouth@ses4energy.com | Santana Energy |
| suzy@megautilities.org | MEGA |
| tanya@meagutilities.org | MEGA |
| general@itctransco.com | ITC Holdings |
| lpage@dickinsonwright.com | Dickinson Wright |
| Deborah.e.erwin@xcelenergy.com | Xcel Energy |
| mmpeck@fischerfranklin.com | Matthew Peck |
| CANDACE.GONZALES@cmsenergy.com | Consumers Energy |
| JHDillavou@midamericanenergyservices.com | MidAmerican Energy Services, LLC |
| JCAltmayer@midamericanenergyservices.com | MidAmerican Energy Services, LLC |
| LMLann@midamericanenergyservices.com | MidAmerican Energy Services, LLC |
| karl.j.hoesly@xcelenergy.com | Northern States Power |
| kerri.wade@teammidwest.com | Midwest Energy Coop |
| dixie.teague@teammidwest.com | Midwest Energy Coop |
| meghan.tarver@teammidwest.com | Midwest Energy Coop |
| sarah.jorgensen@cmsenergy.com | Consumers Energy |
| Michael.torrey@cmsenergy.com | Consumers Energy |
| adella.crozier@dteenergy.com | DTE Energy |
| karen.vucinaj@dteenergy.com | DTE Energy |
| Michelle.Schlosser@xcelenergy.com | Xcel Energy |
| dburks@glenergy.com | Great Lakes Energy |
| kabraham@mpower.org | Michigan Public Power Agency |

# GEMOTION DISTRIBUTION SERVICE LIST

| | |
|---|---|
| shannon.burzycki@wecenergygroup.com | Michigan Gas Utilities Corporation |
| kerdmann@atcllc.com | American Transmission Company |
| handrew@atcllc.com | American Transmission Company |
| phil@allendaleheating.com | Phil Forner |
| tlundgren@potomaclaw.com | Timothy Lundgren |
| lchappelle@potomaclaw.com | Laura Chappelle |
| Amanda@misostates.org | Amanda Wood |