STATE OF MICHIGAN

BEFORE THE MICHIGAN PUBLIC SERVICE COMMISSION

* * * * *

In the matter, on the Commission's own motion, to update the energy waste reduction plan instructions and forms for self-directed customers pursuant to MCL 460.1093.	)))))	Case No. U-21627

At the July 2, 2024 meeting of the Michigan Public Service Commission in Lansing, Michigan.

PRESENT: Hon. Daniel C. Scripps, Chair
Hon. Katherine L. Peretick, Commissioner
Hon. Alessandra R. Carreon, Commissioner

ORDER APPROVING FORMS AND INSTRUCTIONS

Public Act 229 of 2023 (Act 229) and Public Act 235 of 2023 (Act 235) were signed by Governor Gretchen Whitmer on November 28, 2023. Acts 229 and 235 amend the Clean and Renewable Energy and Energy Waste Reduction (EWR) Act, Public Act 295 of 2008 (Act 295). As enacted, Act 229 continues to require electric and natural gas providers to have approved EWR plans under MCL 460.1073 and additionally provides that current legislative incremental energy savings shall remain in effect until 2026. *See*, MCL 460.1077. Act 229 further amends plan requirements and the incentive structure authorized under Act 295.

On February 8, 2024, the Commission issued an order in Case No. U-21567 (February 8 order) providing an opportunity for interested persons to file comments on Act 229. Additionally, the February 8 order indicated that:

> [w]ith respect to customers who are exempt from charges they would otherwise incur as an electric customer under Sections 72, 89, and 91 of Act 229, if the customer files with its provider and implements a self-directed EWR plan (self-directed customers), the Commission finds that the Commission Staff (Staff) should work to revise the application forms to self-direct and that self-directed customers will be required to achieve the new higher standards. The Commission finds that a docket will be opened for the revision of these forms similar to Case No. U-16563. Case No. U-16563 was originally opened in 2011 and initially developed and approved instructions and forms to apply for self-direct status with a utility provider.

February 8 order, pp. 4-5.

The Staff submitted proposed revisions as described in the February 8 order to the Commission. Specifically, the revised Instructions for Completing the 3-YEAR AVERAGE Self-Directed Plan are attached to this order as Exhibit A, the revised Instructions for Completing the WEATHER NORMALIZED Self-Directed Plan are attached to this order as Exhibit B, and the revised Instructions for Completing the Self-Directed EWR Annual Report are attached to this order as Exhibit C (collectively referred to as the revised forms). The final form templates are made available as Excel spreadsheets on the Commission's website.

On April 25, 2024, the Commission issued an order requesting comments on the revised forms and instructions, as attached, to be filed by May 28, 2024.

No comments were filed.

The Commission concludes that the revised forms and instructions should be approved.

THEREFORE, IT IS ORDERED that the revised forms and instructions, attached to this order as Exhibits A through C, are approved.

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 LARA-MPSC-Edockets@michigan.gov and to the Michigan Department of Attorney General - Public Service Division at hugheys@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

Katherine L. Peretick, Commissioner

Alessandra R. Carreon, Commissioner

By its action of July 2, 2024.

Lisa Felice, Executive Secretary

Exhibit A

Instructions for Completing the 3-YEAR AVERAGE Self-Directed Plan

Enter Plan Year: **2025** (This will update the years on these worksheets)

Dates to remember:

- This plan should be submitted to the provider by July 15, 2024.
- Utility notification of deficiencies should be mailed by August 6, 2024.
- Final Plan, with deficiencies remedied should be submitted to the provider by September 5, 2024.
- Exemption from most EWR surcharges will begin January 1, 2025.
- Upon customer request, a provider may waive these deadlines.

Single accounts with a peak demand <2MW, aggregation of multiple customers and aggregation of accounts <10MW for the previous year are required to use the services of an Energy Waste Reduction Service Company to develop and implement a self-directed plan.

Step 1

This template applies to plans that establish baseline usage using the 3-yr average. If using weather normalized 2023 usage, please complete the template titled Weather Normalized Self-Directed Plan.

Step 2

Only input data for the years covered by your plan. Example: Do not input data for year 2027 if your plan covers 2025-2026.

Step 3

Complete "Form" tab
Complete "Detail Table-3yr Ave" tab
Please refer to your annual reports and plan "Carry Forward Worksheets" for the excess savings amounts and years that were declared.
Complete the "Plan Outline" tab
Rows may be added or deleted to include more or fewer sites as covered by your plan. Verify cells calculate as intended when adding rows.
First insert a row then copy and paste an entire row from the row just above that location to obtain the correct formatting.
Row numbering can be repaired on all except the "form" tab by copying and pasting cell A2 down the sheet.
New sites for which a full year's energy usage is unavailable: Provide reasonable estimates of annual energy usage and peak demand. Suggestions: a) use MWh/square foot of a typical facility of this type x actual square footage then make adjustments for differences. b) If procuring an existing site, ask the prior owner for usage information. c) If a few months of occupied electric usage is available, extrapolate this usage for the entire year. Amend the plan when actual data becomes available.

Printing : To coodinate page numbering, use the following print options; >File, >print, > entire work book

Notes:

1) Please contact your electric provider or the MPSC Energy Waste Reduction Section if you have questions about how to complete this template.
2) Copied from "Annual Report Template": Excess savings from energy waste reduction measures may be claimed in, or deferred to, a successive plan year not to exceed four consecutive years following the plan year in which the savings occurred. Measures eligible for deferral shall have a measure life of six or more years and shall not constitute changes in manintenance only, or changes in operating practices that are not accompanied by new physical energy management controls or systems. Excess savings deferred to a future plan year must begin with the first successive year and shall be used in the shortest time period possible. Excess savings shall not be deferred to years that exceed the term of the self directed plan. Excess savings shall expire upon termination of an entire self-direct plan. The customer shall report the as implemented distribution of excess savings in the first annual report to the provider following installation of the eligible measure. Once declared in the annual report, the savings distribution shall not be revised. Providers may claim deferred savings of eligible self- directed electric customers in the provider's incremental savings goal consistent with the distribution provided in plans and reports of eligible self-directed electric customers.

A. Eligibility for Self-Direct Programs

1) An eligible customer means a customer with a peak demand for the previous year of at least 1 megawatt at a single location or in aggregate at all facilities within the provider's service territory. These eligibility requirements do not apply to a customer that installs or modifies an electric efficiency improvement under a property assessed clean energy program pursuant to the property assessed clean energy act, 2010 PA 270.

2) To verify eligibility requirements, the customer filing a Self-Directed Energy Waste Reduction Plan shall be on a demand rate or the customer may use a provider's commission-approved method to estimate customer annual-peak demand.

3) Customer sites or accounts that have received an energy optimization, energy waste reduction, or efficient electrification rebate or incentive from an electric provider or the independent energy waste reduction program administrator are not eligible to implement a self-directed plan within the calculated waiting period . The waiting period in months is equal to the rebate amount ($) /current month's EWR surcharge . If the waiting period will lapse after the self-directed plan filing deadline, but before the self-directed plan year begins on January 1, a customer may submit a plan to self direct during the upcoming plan period.

4) An energy waste reduction service company may aggregate accounts of a single customer or any group of eligible customers with a shared business relationship where the energy requirements of the accounts in aggregate equals the minimum thresholds described in Section A1 above. A shared business relationship means entities that are affiliated through common ownership of the business or property, such as several business entities owned by the same individual or several schools within a single school district.

B. Self-Directed Energy Waste Reduction Plan and Plan Amendment Filing Requirements

1) Unless the deadline is waived by the provider, an eligible customer shall submit its Self-Directed Energy Waste Reduction Plan or an amendment of an existing plan to its electric provider by July 15 of the calendar year preceding the first year covered by the plan. Customers shall use the applicable template for weather-normalized or 3-year average electric usage. If the filing is incomplete, the provider shall notify the customer of any deficiency within 15 business days. The customer shall remedy the deficiency and submit a corrected filing within 30 days of the provider's notification.

2) A self-directed energy waste reduction plan shall cover two or more calendar years and shall provide for incremental aggregate energy savings for each year that meet or exceed the statutory standards based on electricity purchased for the previous year at the site or sites covered by the plan. A customer filing a self-directed plan with its provider shall specify whether electricity usage used in the calculation of incremental energy savings will be weather-normalized or based on the average number of megawatt hours of electricity consumed by the customer annually during the previous three years. Once the self-directed plan is submitted, this option may not be changed.

3) Planned energy savings shall not include changes in business activity levels that are not attributable to energy waste reduction, including such items as site closures, decreases in production, and decreases in hours of operation. Changes in electricity usage because of the installation, operation or testing of pollution control equipment shall likewise not be attributed to energy waste reduction. Measures that require fuel switching, including efficient electrification measures per 2023 PA 235, or self-generation are not eligible to be included in the self-directed plan. Please contact your electric provider or the MPSC Energy Waste Reduction Section if you have questions concerning the eligibility of particular proposed energy efficiency measures.

4) Unless the deadline is waived by the provider, an eligible customer may submit plan amendments, including those used to extend the term of the self-directed plan, to the provider at any time between January 1 and the end of the open enrollment period on July 15 of each year. Amendments solely reflecting site terminations may be submitted at any time.

Self-Directed Energy Waste Reduction (EWR) Plan - Plan Year 2025

Submit completed form by July 15, 2024

Qualifications: ____ 1 MW single site or, ____ 1 MW sites aggregated, # of sites aggregated ____

Legal Name of business: _____

Mailing Address of Signatory: _____

Business phone number: _____ **Fax number:** _____ **e-mail**: _____

Term of the Self-directed Plan (2 to 5yrs): _____ **years** **End-of-term renewals for 2025 must be submitted by July 15, 2024**

Date when customer will begin to implement the plan at the first site: January 1, 2025
(coincides with exemption from energy waste reduction charges at all sites.)

Basis for calculating savings: [X] **3-year average**

Three (3) Year Average - Summary Table

(This table will auto update when you enter your values on the "Detail Table" tab)

Plan Year	Minimum performance standard (%) **(a)**	Total Base Annual Usage in MWh per site **(b)**	Minimum Incremental Annual Savings to meet the EWR Performance Standard (MWh) **(c) = (a) x (b)**	Planned (targeted) Incremental Annual Energy Savings in MWh (normalized) no less than **(c)**
2025	1.00%	0	0.0	0.0
2026	1.50%	0	0.0	0.0
2027	1.50%	0	0.0	0.0
2028	1.50%	0	0.0	0.0
2029	1.50%	0	0.0	0.0

The provider shall notify the customer of any deficiency within 15 days. The customer shall remedy the deficiency within 30 days of notification.
Please work with your provider as soon as possible as often it takes several interactions to correct the deficiency.

Customer:
Authorized Name (print): _____
*Signature: _____
Title: _____
Date: _____
e-mail: _____ fax: _____

Energy Waste Reduction Service Company, if required**
Authorized Name (print): _____
*Signature: _____
Title: _____
Date: _____ e-mail: _____
Phone: _____ fax: _____
** Customers are required to use the services of an energy waste reduction service company to develop and implement a self-directed plan. A Customer may be exempt only if in the preceding year the annual peak demand was greater than 2MW per site, or 10 MW in the aggregate of sites to be covered by the self-direct plan.

Additional Customer Contact (optional):
Name: _____
Title: _____
e-mail: _____ fax: _____
Phone: _____

Provider Contact Information: (optional):
Name: _____ Phone: _____
Title: _____ fax: _____
e-mail: _____

Three (3) Year Average - 2025 Plan Year (Minimum Performance Standard 1.0%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	**2023 Site Annual Metered Peak Demand (MW)	2021 Site Annual Metered Electric Usage (MWh) (d1)	2022 Site Annual Metered Electric Usage (MWh) (d2)	2023 Site Annual Metered Electric Usage (MWh) (d3)	Total Base Annual Usage in (MWh) . **(g) = (d1+d2+d3)/3**	Minimum Incremental Annual Savings to meet EWR Performance Standard (MWh) (h) = (1.0%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
						0	0.000	
						0	0.000	
						0	0.000	
						0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.								0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.								0
Totals		**0**	**0**	**0**	**0**	**0**	**0.000**	**0**

*** Check with provider. Consumers Energy requires Account numbers (A-..). Detroit Edison requires electric Account and Meter numbers (M-..). All require rate code (R-..). Information may be found on your utility bill.**

****Demand Eligibility Requirements: Single site > 1MW, or aggregate of sites > 1MW**

NOTE: 1) Site, Account and Electric Usage can be copied and pasted from the 2025 table into years 2026-2029.

2) See "Instructions" tab for adding and deleting sites.

3) Excess savings may be carried forward to a successive plan year not to exceed four consecutive years following the plan year in which the savings occurred. Excess savings must be used in the shortest time period possible. To be eligible, excess savings must come from projects having a measure life of six or more years.

Three (3) Year Average - 2026 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2021 Site Annual Metered Electric Usage (MWh) (d1)	2022 Site Annual Metered Electric Usage (MWh) (d2)	2023 Site Annual Metered Electric Usage (MWh) (d3)	Total Base Annual Usage in (MWh). **(g) = (d1+d2+d3)/3**	Minimum Incremental Annual Savings to meet EWR Performance Standard (MWh) (h) = (1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
						0	0.000	
						0	0.000	
						0	0.000	
						0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.								0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.								0
Totals			**0**	**0**	**0**	**0**	**0.000**	**0**

Three (3) Year Average - 2027 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2021 Site Annual Metered Electric Usage (MWh) (d1)	2022 Site Annual Metered Electric Usage (MWh) (d2)	2023 Site Annual Metered Electric Usage (MWh) (d3)	Total Base Annual Usage in (MWh) . **(g) = (d1+d2+d3)/3**	Minimum Incremental Annual Savings to meet EWR Performance Standard (MWh) (h) = (1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
						0	0.000	
						0	0.000	
						0	0.000	
						0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.								0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.								0
Totals			**0**	**0**	**0**	**0**	**0.000**	**0**

Three (3) Year Average - 2028 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2021 Site Annual Metered Electric Usage (MWh) (d1)	2022 Site Annual Metered Electric Usage (MWh) (d2)	2023 Site Annual Metered Electric Usage (MWh) (d3)	Total Base Annual Usage in (MWh). **(g) = (d1+d2+d3)/3**	Minimum Incremental Annual Savings to meet EWR Performance Standard (MWh) (h) = (1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
						0	0.000	
						0	0.000	
						0	0.000	
						0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.								0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.								0
Totals			**0**	**0**	**0**	**0**	**0.000**	**0**

Three (3) Year Average - 2029 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2021 Site Annual Metered Electric Usage (MWh) (d1)	2022 Site Annual Metered Electric Usage (MWh) (d2)	2023 Site Annual Metered Electric Usage (MWh) (d3)	Total Base Annual Usage in (MWh). **(g) = (d1+d2+d3)/3**	Minimum Incremental Annual Savings to meet EWR Performance Standard (MWh) (h) = (1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
						0	0.000	
						0	0.000	
						0	0.000	
						0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.								0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.								0
Totals			**0**	**0**	**0**	**0**	**0.000**	**0**

Excess Savings Carry Forward Worksheet

(Complete this worksheet if you are carrying savings forward past one additional year)

Excess savings deferred to a future plan year must begin with the first successive year and shall be used in the shortest time period possible. Excess savings shall not be deferred to years that exceed the term of the self- directed plan. Excess savings shall expire upon termination of an entire self-direct plan. The customer shall report the distribution of excess savings in the first annual report to the provider following installation of the eligible measure. Once declared, the savings distribution shall not be revised.

	Excess Savings to Carry Forward
2025 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2026 =	
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Total Excess =	**0**

* Excess savings to be carried forward from projects implemented prior to 2025, can be reported farther below.

	Excess Savings to Carry Forward
2026 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Total Excess =	**0**

	Excess Savings to Carry Forward
2027 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Excess Savings to be Carried Forward to 2031 =	
Total Excess =	**0**

	Excess Savings to Carry Forward
2028 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0

Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Excess Savings to be Carried Forward to 2031 =	
Excess Savings to be Carried Forward to 2032 =	
Total Excess =	**0**

2021 to 2024 Total excess savings to be carried forward from previous years, as provided in your annual report(s)**

Excess Savings to be Carried Forward to 2025 =	
Excess Savings to be Carried Forward to 2026 =	
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Total Excess =	**0**

** For existing self-direct customers only. Projects implemented in 2024 prior to submitting an annual report, please insert the following detail a,b:

a) 2024 project excess savings total= _____ MWh (Distribution: 2025= _____ , 2026= _____, 2027= _____, 2028= _____)
b) Short Project Description:

Summary Table - Excess Savings Carried Forward From a Prior Year (Combined savings for each year)

Excess Savings to be Carried Forward to 2025 =	0.0
Excess Savings to be Carried Forward to 2026 =	0
Excess Savings to be Carried Forward to 2027 =	0
Excess Savings to be Carried Forward to 2028 =	0
Excess Savings to be Carried Forward to 2029 =	0
Excess Savings to be Carried Forward to 2030 =	0
Excess Savings to be Carried Forward to 2031 =	0
Excess Savings to be Carried Forward to 2032 =	0

Plan Outline

Customer Name: _____

Directions: The plan outline should describe how the customer intends to achieve the incremental energy savings for each year of the plan. Planned Incremental Annual Energy Savings for each site should be placed in the "Detail Table" column (i), totals are displayed here for reference. Free format for each year and can include text, calculations and tables. Cells can be merged for larger text areas.

Alternate Method: Provide the plan outline as an attachment. Please reference the attachment below. Include company name, date and sign.

ATTACHMENT No. _____ Date: _____

2025 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2026 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2027 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2028 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2029 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

Exhibit B

Instructions for Completing the WEATHER NORMALIZED Self-Directed Plan

Enter Plan Year: **2025** (This will update the years on these worksheets)

Dates to remember:

- This plan should be submitted to the provider by July 15, 2024.
- Utility notification of deficiencies should be mailed by August 6, 2024.
- Final Plan, with deficiencies remedied should be submitted to the provider by September 5, 2024.
- Exemption from most EWR surcharges will begin January 1, 2025.
- Upon customer request, a provider may waive these deadlines.

Single accounts with a peak demand <2MW, aggregation of multiple customers and aggregation of accounts <10MW for the previous year are required to use the services of an Energy Waste Reduction Service Company to develop and implement a self-directed plan.

Step 1

This template applies to plans that establish baseline usage using weather normalization of 2022 usage. If baseline usage will be determined by using the three year average, please complete the form titled 3-Year Average Self-Directed Plan.

Step 2

Only input data for the years covered by your plan. Example: Do not input data for year 2027 if your plan covers 2025-2026.

Step 3

Complete "Form" tab
Complete "Detail Table-Weath Norm" tab
Complete, if applicable, column (f) in the "Summary Table" on the "Form" tab showing the allocation of excess energy savings according to Note 2 below.
Please refer to your annual reports and plan "Carry Forward Worksheets" for the excess savings amounts and years that were declared.
Complete the "Plan Outline" tab
Complete the "Weather Factor" tab
Rows may be added or deleted to include more or fewer sites as covered by your plan. Verify cells calculate as intended when adding rows.
First insert a row then copy and paste an entire row from the row just above that location to obtain the correct formatting.
Row numbering can be repaired on all except the "form" tab by copying and pasting cell A2 down the sheet.
New sites for which a full year's energy usage is unavailable: Provide reasonable estimates of annual energy usage and peak demand. Suggestions: a) use MWh/square foot of a typical facility of this type x actual square footage then make adjustments for differences. b) If procuring an existing site, ask the prior owner for usage information. c) If a few months of occupied electric usage is available, extrapolate this usage for the entire year. Amend the plan when actual data becomes available.

Printing : To coodinate page numbering, use the following print options; >File, >print, > entire work book

Notes:

1) Please contact your electric provider or the MPSC Energy Waste Reduction Section if you have questions about how to complete these forms.

2) Copied from "Annual Report Template": Excess savings from energy waste reduction measures may be claimed in, or deferred to, a successive plan year not to exceed four consecutive years following the plan year in which the savings occurred. Measures eligible for deferral shall have a measure life of six or more years and shall not constitute changes in manintenance only, or changes in operating practices that are not accompanied by new physical energy management controls or systems. Excess savings deferred to a future plan year must begin with the first successive year and shall be used in the shortest time period possible. Excess savings shall not be deferred to years that exceed the term of the self-directed plan. Excess savings shall expire upon termination of an entire self-direct plan. The customer shall report the as implemented distribution of excess savings in the first annual report to the provider following installation of the eligible measure. Once declared in the annual report, the savings distribution shall not be revised. Providers may claim deferred savings of eligible self- directed electric customers in the provider's incremental savings goal consistent with the distribution provided in plans and reports of eligible self-directed electric customers.

A. Eligibility for Self-Direct Programs

1) An eligible customer means a customer with a peak demand for the previous year of at least 1 megawatt at a single location or in aggregate at all facilities within the provider's service territory. These eligibility requirements do not apply to a customer that installs or modifies an electric efficiency improvement under a property assessed clean energy program pursuant to the property assessed clean energy act, 2010 PA 270.

2) To verify eligibility requirements, the customer filing a Self-Directed Energy Waste Reduction Plan shall be on a demand rate or the customer may use a provider's commission-approved method to estimate customer annual-peak demand.

3) Customer sites or accounts that have received an energy optimization, energy waste reduction, or efficient electrification rebate or incentive from an electric provider or the independent energy waste reduction program administrator are not eligible to implement a self-directed program within the calculated waiting period. The waiting period in months is equal to the rebate amount ($) /current month's EWR surcharge. If the waiting period will lapse after the application deadline, but before the self-direct plan year begins on January 1, a customer may submit a plan to self-direct during the upcoming plan period.

4) An energy waste reduction service company may aggregate accounts of a single customer or any group of eligible customers with a shared business relationship where the energy requirements of the accounts in aggregate equals the minimum thresholds described in Section A1 above. A shared business relationship means entities that are affiliated through common ownership of the business or property, such as several business entities owned by the same individual or several schools within a single school district.

B. Self-Directed Energy Waste Reduction Plan and Plan Amendment Filing Requirements

1) Unless the deadline is waived by the provider, an eligible customer shall submit its Self-Directed Energy Waste Reduction Plan or an amendment of an existing plan to its electric provider by July 15 of the calendar year preceding the first year covered by the plan. Customers shall use the template contained in Attachment B or C. If the filing is incomplete, the provider shall notify the customer of any deficiency within 15 business days. The customer shall remedy the deficiency and submit a corrected filing within 30 days of the provider's notification.

2) A self-directed energy waste reduction plan shall cover two or more calendar years and shall provide for incremental aggregate energy savings for each year that meet or exceed the statutory standards based on electricity purchased for the previous year at the site or sites covered by the plan. A customer filing a self-directed plan with its provider shall specify whether electricity usage used in the calculation of incremental energy savings will be weather-normalized or based on the average number of megawatt hours of electricity consumed by the customer annually during the previous three years. Once the self-directed plan is submitted, this option may not be changed.

3) Planned energy savings shall not include changes in business activity levels are not attributable to energy waste reduction, including such items as site closures, decreases in production, and decreases in hours of operation. Changes in electricity usage because of the installation, operation or testing of pollution control equipment shall likewise not be attributed to energy waste reduction. Measures that require fuel switching, including efficient electrification measures per 2023 PA 235, or self-generation are not eligible to be included in the self-direct plan. Please contact your provider or the MPSC Energy Waste Reduction Section if you have questions concerning the eligibility of particular proposed energy efficiency measures.

4) Unless the deadline is waived by the provider, an eligible customer may submit plan amendments, including those used to extend the term of the self-directed plan, to the provider at any time between January 1 and the end of the open enrollment period on July 15 of each year. Amendments solely reflecting site terminations may be submitted at any time.

Self-Directed Energy Waste Reduction (EWR) Plan - Plan Year 2025

Submit completed form by July 15, 2024

Qualifications: ____ 1 MW single site or, ____ 1 MW sites aggregated, # of sites aggregated ____

Legal Name of business: _____

Mailing Address of Signatory: _____

Business phone number: _____ **Fax number:** _____ **e-mail**: _____

Term of the Self-directed Plan (2 to 5 yrs): _____ **years** **End-of-term renewals for 2025 must be submitted by July 15, 2024**

Date when customer will begin to implement the plan at the first site: January 1, 2025
(coincides with exemption from energy waste reduction charges at all sites.)

Basis for calculating savings: [X] **Weather-normalized**

Weather Normalized - Summary Table

(This table will auto update when you enter your values on the "Detail Table" tab)

Plan Year	Minimum EWR Performance Standard (%) (a)	Total Base Annual Usage in MWh per site (weather normalized) **(b)**	Minimum Incremental Annual Savings to meet the EWR Performance Standard (MWh) (c) = (a) x (b)	Planned (targeted) Incremental Annual Energy Savings in MWh (normalized) no less than **(c)**
2025	1.00%	0	0.0	0.0
2026	1.50%	0	0.0	0.0
2027	1.50%	0	0.0	0.0
2028	1.50%	0	0.0	0.0
2029	1.50%	0	0.0	0.0

The provider will notify the customer of any deficiency within 15 days. The customer must remedy the deficiency within 30 days of notification.
Please work with your provider as soon as possible as often it takes several interactions to correct the deficiency.

Customer:
Authorized Name (print): _____
*Signature: _____
Title: _____
Date: _____
e-mail: _____ fax: _____

Energy Waste Reduction Service Company, if required**
Authorized Name (print): _____
*Signature: _____
Title: _____
Date: _____ e-mail: _____
Phone: _____ fax: _____
** Customers are required to use the services of an energy waste reduction service company to develop and implement a self-directed plan. A Customer may be exempt only if in the preceding year the annual peak demand was greater than 2MW per site, or 10 MW in the aggregate of sites to be covered by the self-direct plan.

Additional Customer Contact (optional):
Name: _____
Title: _____
e-mail: _____ fax: _____
Phone: _____

Provider Contact Information: (optional):
Name: _____ Phone: _____
Title: _____ fax: _____
e-mail: _____

Weather Normalized 2025 Plan Year (Minimum Performance Standard 1.0%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	**2023 Site Annual Metered Peak Demand (MW)	2023 Site Annual Metered Electric Usage (MWh) (d)	Weather Adjustment Factor (see "Weather Factor" Tab) **(e)**	Total Base Annual Usage in (MWh) adjusted forweather. **(g)=(d)*(e)**	Minimum Annual Savings to meet EWR Performance Standard (MWh) (h)=(1.0%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
					0	0.000	
					0	0.000	
					0	0.000	
					0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.							0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.							0
Totals		**0**	**0**		**0**	**0.000**	**0**

*** Check with provider. Consumers Energy requires Account numbers (A-..). Detroit Edison requires electric Account and Meter numbers (M-..). All require ra**
Information may be found on your utility bill.

****Demand Eligibility Requirements: Single site > 1MW, or aggregate of sites > 1MW**

NOTE: 1) Site, Account and Electric Usage can be copied and pasted from the 2025 table into years 2026-2029.

2) See "Instructions" tab for adding and deleting sites.

3) Excess savings may be carried forward to a successive plan year not to exceed four consecutive years following the plan year in which the savings occurred. Excess s be used in the shortest time period possible. To be eligible, excess savings must come from projects having a measure life of six or more years.

Weather Normalized 2026 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2023 Site Annual Metered Electric Usage (MWh) (d)	Weather Adjustment Factor (see "Weather Factor" Tab) **(e)**	Total Base Annual Usage in (MWh) adjusted for weather. **(g)=(d)*(e)**	Minimum Annual Savings to meet EWR Performance Standard (MWh) (h)=(1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
					0	0.000	
					0	0.000	
					0	0.000	
					0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.							0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.							0
Totals			**0**		**0**	**0.000**	**0**

Weather Normalized 2027 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2023 Site Annual Metered Electric Usage (MWh) (d)	Weather Adjustment Factor (see "Weather Factor" Tab) **(e)**	Total Base Annual Usage in (MWh) adjusted for weather. **(g)=(d)*(e)**	Minimum Annual Savings to meet EWR Performance Standard (MWh) (h)=(1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
					0	0.000	
					0	0.000	
					0	0.000	
					0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.							0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.							0
Totals			**0**		**0**	**0.000**	**0**

Weather Normalized 2028 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2023 Site Annual Metered Electric Usage (MWh) (d)	Weather Adjustment Factor (see "Weather Factor" Tab) **(e)**	Total Base Annual Usage in (MWh) adjusted for weather. **(g)=(d)*(e)**	Minimum Annual Savings to meet EWR Performance Standard (MWh) (h)=(1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
					0	0.000	
					0	0.000	
					0	0.000	
					0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.							0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.							0
Totals			**0**		**0**	**0.000**	**0**

Weather Normalized 2029 Plan Year (Minimum Performance Standard 1.5%)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	(Blank)	2023 Site Annual Metered Electric Usage (MWh) (d)	Weather Adjustment Factor (see "Weather Factor" Tab) **(e)**	Total Base Annual Usage in (MWh) adjusted for weather. **(g)=(d)*(e)**	Minimum Annual Savings to meet EWR Performance Standard (MWh) (h)=(1.5%) x (g)	Planned Incremental Annual Energy Savings in MWh no less than (h) **(i)**
					0	0.000	
					0	0.000	
					0	0.000	
					0	0.000	
Current Year Excess Savings to be Carried Forward (Not more than 4 additional years from implementation), see NOTE (3). This will subtract from the Planned Savings Total, complete the Carry Forward Worksheet.							0
Excess Savings Carried Forward from a Prior Year(s). From "Carry Forward Work Sheets" summary table. This will add to the Planned Savings Total.							0
Totals			**0**		**0**	**0.000**	**0**

Excess Savings Carry Forward Worksheet

(Complete this worksheet if you are carrying savings forward past one additional year)

Excess savings deferred to a future plan year must begin with the first successive year and shall be used in the shortest time period possible. Excess savings shall not be deferred to years that exceed the term of the self- directed plan. Excess savings shall expire upon termination of an entire self-direct plan. The customer shall report the distribution of excess savings in the first annual report to the provider following installation of the eligible measure. Once declared, the savings distribution shall not be revised.

	Excess Savings to Carry Forward
2025 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2026 =	
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Total Excess =	**0**

* Excess savings to be carried forward from projects implemented prior to 2025, can be reported farther below.

	Excess Savings to Carry Forward
2026 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Total Excess =	**0**

	Excess Savings to Carry Forward
2027 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Excess Savings to be Carried Forward to 2031 =	
Total Excess =	**0**

	Excess Savings to Carry Forward
2028 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0

Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Excess Savings to be Carried Forward to 2031 =	
Excess Savings to be Carried Forward to 2032 =	
Total Excess =	**0**

2021 to 2024 Total excess savings to be carried forward from previous years, as provided in your annual report(s)**

Excess Savings to be Carried Forward to 2025 =	
Excess Savings to be Carried Forward to 2026 =	
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Total Excess =	**0**

** For existing self-direct customers only. Projects implemented in 2024 prior to submitting an annual report, please insert the following detail a,b:

a) 2024 project excess savings total= _____ MWh (Distribution: 2025= _____ , 2026= _____, 2027= _____, 2028= _____)
b) Short Project Description:

Summary Table - Excess Savings Carried Forward From a Prior Year (Combined savings for each year)

Excess Savings to be Carried Forward to 2025 =	0.0
Excess Savings to be Carried Forward to 2026 =	0
Excess Savings to be Carried Forward to 2027 =	0
Excess Savings to be Carried Forward to 2028 =	0
Excess Savings to be Carried Forward to 2029 =	0
Excess Savings to be Carried Forward to 2030 =	0
Excess Savings to be Carried Forward to 2031 =	0
Excess Savings to be Carried Forward to 2032 =	0

Plan Outline

Customer Name: _____

Directions: The plan outline should describe how the customer intends to achieve the incremental energy savings for each year of the plan. Planned Incremental Annual Energy Savings for each site should be placed in the "Detail Table" column (i), totals are displayed here for reference. Free format for each year and can include text, calculations and tables. Cells can be merged for larger text areas.

Alternate Method: Provide the plan outline as an attachment. Please reference the attachment below. Include company name, date and sign.

ATTACHMENT No. _____ Date: _____

2025 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2026 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2027 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2028 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

2029 Plan Outline Total Planned Annual Energy Savings = 0.0 MWh (see detail tab)

Weather Adjustment Factor

Customer Name: _____

Instructions:

- There are two methods available, choose one.
- Insert factor in column (e) of "Detail Table - Weath Norm" tab:

1) Choose a weather adjustment factor from the table that most closely represents your business.

- Factors shown in the table below are the same for customers of Detroit Edison and Consumers Energy when correcting 2023 electric usage.

Weather adjustment factor TABLE (Used to adjust 2023 electric usage)

Building type	Factor
Commercial Secondary	0.9948
Commercial Primary	0.9953
*Automotive Technology	0.9992
**Industrial Primary/Secondary	1.0000

* Auto Technology is automotive headquarters, offices and research centers.

**Industrial customers other than Auto Technology are not subject to temperature-normalization and should use a value of 1.0.

Note: Designation of primary of secondary electric service is often found on your utility bill.

2) Customer created weather adjustment factor by building type.

1. Complete the table

Building type	Factor

2. Please provide the following information (expand cells to accommedate your details if necessary):

Alternate Method: Provide the plan outline as an attachment. Please reference the attachment below. Include company name, date and sign.

A. Weather Adjustment Factor = (Annual Electric use in 2023 Weather adjusted to an average year)/(Electric use in 2023)

B. Describe basis for determining weather adjustment.

C. Provide a calculation demonstrating your methodology

Exhibit C

Instructions for Completing the Self-Directed EWR Annual Report

Enter Plan Year: **2026** (This will update the years on these worksheets)

Dates to remember:

- The report is due no later than March 1, 2027.
- Utility notification of deficiencies should be mailed by March 23, 2027.
- Final report, with deficiencies remedied should be submitted by April 13, 2027.

Step 1

Complete 'Summary Table' Tab. Some of this information may be copied from your original plan form. Only enter data for 2026.

When pasting from original plan form, be sure to use 'Paste Values' rather than generic paste to assure values, and not formulas/formats are copied to the new spreadsheet.

Row numbering may be repaired on all sheets except the Savings Calculations tab by copying and pasting cell A2 down the sheet or dragging the corner of a previous cell.

Terminations and Amendments - Prorate minimum and planned savings using the "Prorated Savings Worksheet". Insert the prorated values in the Summary Table.

- Example: Prorated Savings = (original savings) x (days/365) + (amended savings) x (1-days/365). Days = days from January 1 to the date of termination approval.
- For assistance see the "Prorated Savings Worksheet" tab.

Step 2

Complete "Detail Table" Tab (one row per project or measure). Site description and account information can be copied from your original plan form "Detail Table

Rows may be added or deleted to include more or fewer projects as covered by your report. Verify cells calculate and total as intended when adding rows

- First insert a row in the middle of the table then copy and paste an entire row from the row just above that location to obtain the correct formatting.

Step 3, If excess savings are available to carry forward from projects implemented in 2026 and will be carried forward past one additional year, please fill out the Carry Forward Worksheet.

Step 4 Provide Reliable Estimates of Energy Savings For Each Measure:

A) Overview: Provide energy savings and calculations for each measure (project) using one of the three methods described in Step 3B. Label each calculation with an Attachment Ref. number and include the attachment number on the "Detail Table". Include company name, and date. Attachments should be clearly labeled using the convention A21, B21, C21 etc. for Plan Year 2021 and A22, B22, C22 etc. for Plan Year 2022. Provide formulas used for calculating savings: Example: Lighting KWh Saved = (watts before - watts after) * operating hours/1000

B) Documentation may be done in three ways or in any combination:

1. Provide the calculation for each measure using the forms provided, see "Savings Calculations" tab. Free format for each measure can include text, calculations and tables.
2. Provide the calculations by inserting an additional worksheet according to instructions below. Please include company name, Ref number, and date.
3. If option 1 or 2 above is not your preference, please provide the calculations as separately labeled attachments. Please include company name, Ref number, and date.

C) Measure Life: provide an estimate of useful life based in years. See examples in the "Measure Life Reference" tab.

D) Calculations should be developed using acceptable engineering calculation techniques supported by site-specific operating and equipment performance documentation and or test measurements. Include documentation such as model numbers, load, efficiency, operating hours that supports your base line (before) energy use. For guidance, see your utility's Energy Waste Reduction Program Policies and Procedures Manual Guidelines for Calculating and Documenting Energy Savings of Custom Measures. This document may be found on your utility's website for energy efficiency programs, look for Custom Measures. Information can also be found in the manual that supports the use of building modeling software.

E) Editing within the "Savings Calculation" tab

- Rows may be added or deleted to include more or fewer calculations as covered by your plan.
- Verify cells calculate as intended.

F) Adding a Worksheet: You may need to copy Excel worksheets from other documents. Below are instructions for doing this.

- To copy/move calculation sheet from other workbook.

1) Make sure you are in workbook with the worksheet you want to move or copy.
2) Right-click on tab of worksheet you want to move or copy.
3) In the menu that pops up, select "Move or copy..."
4) In the pop-up window, under "To Book:" use the pull down menu and select the name of the workbook you want to move the worksheet to.
5) In the same pop-up window, under "Before Sheet:" use the pull down menu and select "Custom Calculations"
6) In the same pop-up window, if you would like to maintain a copy of this worksheet in the existing file, check the "Copy" box.
7) Hit "OK"

Note: if you didn't get the tab in the right spot, click and hold the cursor over the tab you want to move and move left or right to the spot desire
(location is indicated by little black arrow that appears).

G) Proof of Purchase (optional) - Attach invoices or other documentation with attachment reference number and company name on top of each

Step 5

Sign and date the report (see "Summary Table"). The report must be signed by an official of the customer having knowledge of the report conten
and responsibility for its implementation and administration attesting that the information provided is true and accurate to the best of their knowledg

Savings Evaluation: The MPSC may request additional information from the provider or customer as necessary to validate savings as provided by MCL 460.1093(10).
If the Commission has reason to believe that the information provided is incomplete or inaccurate, the Commission may initiate a contested case proceeding in accordance with .
MCL 460.1093(11)

Printing: To coordinate page numbering, use the following print options: >File>print>entire work book

A. Filing Requirements for Self-Directed Customers

1) By March 1 of each year, self-directed customers shall file completed annual reports with the electric provider using this template. Self-directed customers shall comply with the Self-Direct Energy Waste Reduction Plan reporting requirements to retain the exemption from energy waste reduction surcharges.

2) Energy savings shall not include changes in business activity levels that are not attributable to energy waste reduction, including such items as site closures, decreases in production, and decreases in hours of operation. Changes in electricity usage because of the installation, operation or testing of pollution control equipment shall likewise not be attributed to energy waste reduction. Measures that require fuel switching, including efficient electrification measures per 2023 PA 235, or self-generation are not eligible to be included in the self-directed plan.

3) In order to verify energy savings achieved by the plan, the MPSC may require submission of copies of invoices, vouchers, contracts or other documentation of energy efficient equipment or services obtained by the customer. A customer may attach copies of these documents to its annual report.

4) Projected incremental energy savings shall be presented on a calendar year basis for savings measures implemented that year. Measures implemented part-way through the year may be annualized for calculating energy savings accrued for the year.

5) Excess savings from energy waste reduction measures installed in 2012 or later, may be claimed in, or deferred to, a successive plan year not to exceed four consecutive years following the plan year in which the savings occurred. Measures eligible for deferral shall have a measure life of six or more years and shall not constitute changes in maintenance only, or changes in operating practices that are not accompanied by new physical energy management controls or systems. Excess savings deferred to a future plan year must begin with the first successive year and shall be used in the shortest time period possible. Excess savings shall not be deferred to years that exceed the term of the self-directed plan. Excess savings shall expire upon termination of an entire self-direct plan. The customer shall report the distribution of excess savings in the first annual report to the provider following installation of the eligible measure. Once declared, the savings distribution shall not be revised. Providers may claim deferred savings of eligible self-directed electric customers in the provider's incremental savings goal consistent with the
distribution provided in plans and reports of eligible self-directed electric customers.

Self Direct Energy Waste Reduction (EWR) Annual Report - 2026

Submit complete form by March 1, 2027

Qualifications: ____ **1 MW single site or,** ____ **1 MW sites aggregated,** **# of sites aggregated** _____

Legal Name of business: _____ **Plan # (if provided):** _____

Mailing Address of Signatory: _____

Business phone number: _____ **Fax number:** _____ **e-mail**: _____

Summary Table

Plan Year	Minimum EWR Performance Standard (%)	***Minimum Incremental Annual Savings** to meet the EWR Performance Standard (MWh) **(a)**	***Planned** (targeted) **Incremental Annual Energy Savings** in MWh (normalized) **(b)**	**Reported Annual Energy Savings** in MWh. (value should be > (a) to avoid penalties). Fills from "Detail Table"
2026	1.50%			0.0

Completed By Provider:
Actual Savings Exceeds Minimum Annual Savings (Yes/No)

☐ * Check here if sites were terminated or savings were amended during the reporting period and complete the "Prorated Savings Worksheet". Include a copy of the worksheet with your report and insert prorated values for (a) and (b). Otherwise insert values for (a) & (b) as submitted in your plan.

Remedy of Report Deficiency: The provider will notify the customer of any deficiency. The customer must remedy the deficiency by April 13, 2027.

Please work with your provider as soon as possible as often it takes several interactions to correct the deficiency.

Customer:

Authorized Name (print): _____

*Signature: _____

Title: _____

Date: _____

e-mail: _____ fax: _____

Energy Waste Reduction Service Company, if any

Authorized Name (print): _____

*Signature: _____

Title: _____

Date: _____

e-mail: _____ fax: _____

Phone: _____

_____

* This signature is an affirmation that: I am responsible for the plan implementation, the information provided herein is true and correct to the best of my knowledge, and I acknowledge that the Commission may request additional information for validation purposes in accordance with MCL 460.1093.

Additional Customer Contact (optional):

Name: _____

Title: _____

e-mail: _____ fax: _____

Phone: _____

Provider Contact Information: (optional):

Name: _____

Title: _____

e-mail: _____ fax: _____

Phone: _____

Prorated Energy Savings Worksheet - 2026

(Complete this worksheet if you had a termination or amended a plan in 2026)

Plan Terminations and Amendments Year 2026

Description	Minimum Annual Savings to meet the EWR Performance Standard (MWh)	Planned (targeted) Annual Energy Savings (MWh)	* Start Date	** End Date	**Number of Days Active**	**Prorated** Minimum Annual Savings to meet the EWR Performance Standard (MWh)	**Prorated** Planned Annual Energy Savings in MWh
Savings targets in effect as of January 1, 2026 ***			1/1/2026		0.0	0.00	0.00
Amendment Number 1 or Full Termination in 2026					0.0	0.00	0.00
Amendment Number 2 or Full Termination in 2026					0.0	0.00	0.00
	TOTAL (input data to be inserted into the "summary table" items (a) and (b) =				**0.0**	**0.00**	**0.00**

* Start date is the first day of the year or the earlier of one of the following: 1) the date a termination was approved or 2) the date a plan amendment was approved.

** End date is the last day of the year or the earlier of one of the following: 1) the day before a termination was approved or 2) the day before a plan amendment was approved.

*** The initial savings target can be from a plan amendment or your original plan which ever was in effect at the beginning of the year.

Terminated Site List

+ Site Description: (Name, Service Address, for each site terminated)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R	Date of Termination

+ List any partial terminations (individual sites). For full termination the "site description" should say "Full Termination" site specific data is not required.

Customer Name: _____ **Plan # (if provided):** _____

2026 Implemented Energy Savings Measures (Minimum Performance Standard 1.5%)

ID	Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	Description of the Energy Savings Measure	** Date of Project Implementation (became operable).	Estimated Life of the Energy Savings Measure (Years)	Savings Calculation Attachment Reference Number (A09, B09, etc.)	Actual Annual Energy Savings as Provided on the Attachment in MWh
			Excess Savings Carried Forward to 2026 from prior years (see your 2023, 2024 and/or 2025 Annual Reports)-->				
1							
2							
3							
4							
Total Savings 2026 (Actual + Excess Savings Carried Forward to 2026)							**0.0**
Excess Savings to be Carried Forward to 2027 (Use Carry Forward Worksheet if savings will be carried forward past one additional year), see note 2							
Reported Savings 2026 (=Total - Excess from 2026)							**0.0**

*** Check with provider. Consumers Energy requires Account numbers (A-..). Detroit Edison requires electric Account and Meter numbers (M-..). All require rate code (R-..). Information may be found on your utility bill.**

NOTE:

1) Site and Account can be copied and pasted from your original application for this plan year.

2) Excess savings may be carried forward to a successive plan year not to exceed four consecutive years following the plan year in which the savings occurred. Excess savings must be used in the shortest time period possible. To be eligible, excess savings must come from projects having a measure life of six or more years.

3) See Instructions Tab, Step 2, to insert additional rows for more sites.

**** Savings are incremental for each year. Projects must be implemented (become operable) in the year savings are claimed to be counted.**

2026 Excess Savings Carry Forward Worksheet

(Complete this worksheet if you are carrying savings forward past one additional year)

Excess savings deferred to a future plan year must begin with the first successive year and shall be used in the shortest time period possible. Excess savings shall not be deferred to years that exceed the term of the self- directed plan. Excess savings shall expire upon termination of an entire self-direct plan. The customer shall report the distribution of excess savings in the first annual report to the provider following installation of the eligible measure. Once declared, the savings distribution shall not be revised.

Excess Savings to Carry Forward From Projects Implemented in 2026

	As Declared in 2027
2026 Total of Excess Savings to be Carried Forward (Not more than 4 additional years from implementation)* =	0
Excess Savings to be Carried Forward to 2027 =	
Excess Savings to be Carried Forward to 2028 =	
Excess Savings to be Carried Forward to 2029 =	
Excess Savings to be Carried Forward to 2030 =	
Total Excess =	**0**

Project Savings Calculations

Customer Name: _____ **Plan # (if provided):** _____

(Review the "Instructions" tab, step 3, on Project Savings Calculations before you begin)

Proof of Purchase (optional) - Attach invoices with reference numbers.

Attachment Ref: _____

(Ref # convention A21, B21, C21 etc. for Plan Year 2021 and A22, B22, C22 etc. for Plan Year 2022)

Project Description:

Describe Base Line Conditions (before):

Key Assumptions:

Calculation:

Project Savings Calculations

Customer Name: _____ **Plan # (if provided):** _____

Attachment Ref: _____

Proof of Purchase (optional)- Attach invoices with reference numbers.

(Ref # convention A21, B21, C21 etc. for Plan Year 2021 and A22, B22, C22 etc. for Plan Year 2022)

Project Description:

Describe Base Line Conditions (before):

Key Assumptions:

Calculation:

Energy Conservation measure/Equipment Median Service Life (years)

Measure	ASHRAE Value (1995)	CPUC (2001)	MI Deemed Savings Value (2010)
Building Envelope			
Air curtain 10	10		
Blanket insulation 24	24	20	
Molded insulation 20	20	20	
Solar shade film 7	7	10	10
Tinted and reflective coating 14	14	20	20
Electric Transformers			
Electric Transformers	30		
Air Conditioners			
Commercial through-the-wall	15	15	15
Residential single or split pkg	15	15	15
Roof-top multizone	15	15	15
Roof-top single-zone	15	15	15
Water-cooled package	15	15	15
Window unit	10		12
Condensers			
Air-cooled	20		15
Evaporative	20	20	15
Cooling Towers			
Ceramic or FRP	34		
Galvanized metal	20		
Var.-pitch cooling tower fan	13		
Wood	20		
Chiller strainer cycle economizer	15		
Water side economizer	11		
Lighting Peripherals			
Dimming systems	20		
Ballast - all types	12	16	
Lighting fixture - fluorescent - HID - *ETC*	20	16	12
Motion sensor	10	8	
On-off switching	7		
LED Exit		16	12
Delamping		16	12
T8 Fixture		16	12
Photocell		9	
Timer Controls		8	
T5 Fixture		16	12
Induction Fixture		16	
Lighting Controls		16	
Daylighting Controls		16	
Lighting Power Density		16	
Lighting	**hrs**	**yrs**	**yrs**
Incandescent	1,000		
Compact Fluorescent	10,000	8	2
Standard Fluorescent-8'	12,000		
Standard Flourescent-4'	20,000		
High Pressure Sodium	18,000		
Metal Halide	20,000		
Pulse-Start Metal Halide	20,000		
Ceramic Metal Halide	9,000		
Induction	100,000		
LED	100,000		
Halogen Lamp		0.6	

Measure	ASHRAE Value	CPUC (2001)	MI Deemed Savings Value (2010)
Domestic Hot Water			
Heat-pump water heater	10		15
Point-of-use water heater	12		15
Solar water heater	15		20
HE Gas water heater		15	15
Water Heater Controls		15	
Standard Hot Water Boiler		20	
Air Washers			
Air Washers	17		
Air Terminals			
Diffusers, grilles, and registers	27		
Induction and fan-coil units	20		
Low-leakage damper	9		
V A V and double-duct boxes	20		
Variable inlet vane dampers	20		
Ductwork	30		
Air side economizer	10		
Dampers	20		
Coils			
DX, water, or steam	20		
Electric	15		
Turbines and Boilers Hot Water			
Cast iron	35		20
Electric	15		20
Steel fire-tube	25	20	20
Steel water-tube	24	20	20
Burners	21		
Turbines and Boilers Steam			
Cast iron	15		
Electric	15		
Steel fire-tube	25		
Steel water-tube	24		
Burners	21		
Steam traps	7		5
Steam turbines	30		
Fans			
Axial	20		
Centrifugal	25		
High-inlet/low-discharge-type air destratification	15		
Paddle-type air destratification	10		
Propeller	15		
Ventilating roof-mounted	20		
Refrigeration			
Automatic cleaning system for condenser tubes	15		
Condenser floating head pressure control	10	16	15
Hot gas bypass defrost	10		
Polyethylene strip curtain	3	4	4
Refrigeration case cover	11		
Unequal parallel refrigeration	14		
Auto Closer for Cooler/Freezer		8	
Door Gaskets		4	
Heatless Door		16	

Measure	ASHRAE Value	CPUC (2001)	MI Deemed Savings Value (2010)
Furnaces			
gas - or oil-fired	18	20	15
Heat Exchangers			
shell and tube	24		
Heat Pumps			
Commercial air-to-air	15	15	15
Commercial water-to-air	19	15	15
Residential air-to-air	15	15	15
Valve Actuators			
Hydraulic 15	15		
Pneumatic 20	20		
Self contained	10		
Pumps			
Base mounted	20		15
Condensate	15		15
Pipe mounted	10		15
Sump and well	10		15
Thermal Energy Storage Systems			
Ice	19		
Water	20		
Heat Recovery			
Heat recovery from refrigeration Condensers	11		
Plate-typelheat-pipe recovery system	14		
Rotary-type wheel heat recovery system	11		
Makeup air unit for exhaust hood	10		
Package Chillers			
Absorption	23		
Centrifugal	23	20	20
Reciprocating	20	20	20
Scroll or screw	20	20	20
Radiant Heaters			
Electric or gas	10		
Hot water or steam	25		
Compressors and Engines			
Compressors	20		
Engines	20		
Unit Heaters			
Electric or gas	13		
Hot water or steam	20		
Motors and Drives			
Motor starters	18		
Standard electric motor	15		15
Variable-speed DC motor	18		
Variable-speed drive-belt type	10		
Variable-speed drive-solid state	15	15	15
Roofing			
Natural Slate	60.3		
Clay Tile	46.7		
Metal Panel	26.4		
Coal-tar Organic BUR	23		
Coal-tar Glass BUR	11.2		
Asphalt Glass Shingles	17.7		
Asphalt Organic Shingles	17.5		

Other	
Cooking Equipment	12
Thermal Night Curtains	5
Information	1
High Efficiency Motors	15
Variable Frequency Drives	15
Process Overhaul	20
Pump Test	15
System Controls	15
Plug Load Sensor	10
High Efficiency Engine	15
Kiln/Oven/Furnace	20
Thermal Night Curtains	5
Custom Measures – SPC	15
Local Government Initiatives	11
Extrusion Equipment	15
Audits	3

Humidistat Control for Anti-Sweat Heater	12
Insulation on Refrigeration Suction Line	11
Night Covers for Display Cases	5
PSC Evaporator Motor – Walk-in/Display	16
Refrigeration Case Doors – Glass/Acrylic	12
Refrigerator Case with Doors	16
Refrigerator Condensate Evaporator – Elec/Non Elec	8
Strip Curtains for Walk-Ins	4
Ballast: Electronic, for display case	16
Defrost	16
FHP & EFF Conditioner	16
High-efficiency Liquid Suction Heat Exchangers	16
Night Shields on Refrigerator and Freezer Cases	16
Refrigerator: Evaporative Fan Controller	5
Supermarket Systems	14
Thermal Night Curtains	5

Asphalt Glass BUR	16.7		
SBS Modified Asphalt	15.9		
Aspalt Organic BUR	14.7		
EPDM	14.2		
PVC	13.8		
CSPE-CPE	12.8		
EP-TPO	12.7		
Polyisobutylene	10.6		
Cool Roof			20
Controls			
Computer-logic EMS	13	15	15
Deadband thermostat	13		
Electric controls	16		
Electronic controls	15		
Pmeumatic controls	20		
Time clocks	10		

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

STATE OF MICHIGAN)

Case No. U-21627

County of Ingham)

Brianna Brown being duly sworn, deposes and says that on July 2, 2024 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 2nd day of July 2024.

Angela P. Sanderson
Notary Public, Shiawassee County, Michigan
As acting in Eaton County
My Commission Expires: May 21, 2030

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