

STATE OF MICHIGAN
BEFORE THE MICHIGAN PUBLIC SERVICE COMMISSION

* * * * *

In the matter, on the Commission's own motion,	)	
regarding the regulatory reviews, revisions,	)	
determinations, and/or approvals necessary for	)	Case No. U-21321
CONSUMERS ENERGY COMPANY to fully	)	
comply with Public Act 295 of 2008, as	)	
amended by Public Act 342 of 2016.	)	
_____	)	

At the February 8, 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 SETTLEMENT AGREEMENT

On August 1, 2023, Consumers Energy Company (Consumers) filed an application, with supporting testimony and exhibits, requesting approval of its energy waste reduction plan for 2024 through 2025 pursuant to Public Act 295 of 2008, as amended by Public Act 342 of 2016, MCL 460.1001 *et seq*, and other related relief.

A prehearing conference was held on September 12, 2023, before Administrative Law Judge Katherine E. Talbot (ALJ). At the prehearing conference, the ALJ granted intervention to the Natural Resources Defense Council, the National Housing Trust, the Ecology Center, and the Sierra Club. 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. After the tariff sheets have been reviewed and accepted by Commission Staff for inclusion in the tariff book, Consumers Energy Company shall promptly file the final tariff sheets in this docket and serve all parties the same.

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 Attorney General - Public Service Division at pungpl@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 February 8, 2024.

Lisa Felice, Executive Secretary

STATE OF MICHIGAN

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In the matter, on the Commission’s own motion,)
regarding the regulatory reviews, revisions,)
determinations, and/or approvals necessary for) Case No. U-21321
CONSUMERS ENERGY COMPANY to fully)
comply with Public Act 295 of 2008, as amended by)
Public Act 342 of 2016)
_____)

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 1, 2023, Consumers Energy Company (“Consumers Energy” or the “Company”) filed an Application with supporting testimony and exhibits requesting approval of its 2024-2025 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 12, 2023. 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, and the Attorney General of Michigan (“parties”). For purposes of this Settlement Agreement, the term “Stakeholders” refers collectively to the Commission Staff, NRDC, NHT, the Ecology Center, Sierra Club, and the Attorney General of Michigan.

NOW THEREFORE, for purposes of settlement of Case No. U-21321, the undersigned parties agree as follows:

1. The parties agree that the Company's filed 2024-2025 EWR Plan should be approved in its entirety except as modified by 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 March 2024 customer bills. If the surcharges are implemented in April 2024 or later, they would have to be modified accordingly.

3. The parties agree that the energy savings targets for the Company for both 2024 and 2025 program years will be 2% for electric and 1% for natural gas of 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.

4. The parties agree that all data collection and reporting included in this Settlement Agreement will be subject to current Company and Commission data and privacy tariffs and regulations and future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

5. 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.

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

7. The parties agree that 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. This reallocation was approved in Case Nos. U-16412, U-16670, U-17351, U-17771, U-18261, U-20372 and U-20875 and is authorized by Section 71(4)(h) of Act 295. 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 as follows: for gas, the Company may increase investment by up to 10%, and for electric, the Company may increase investment by 6% and up to an additional 6% if needed to support achievement of the 2% electric savings goal. The Company agrees to provide support for, and will review with Stakeholders, electric investments that exceed the amounts indicated in Attachment D by more than 6%.

8. *Income-Qualified Investment.* The Company will invest in its Income-Qualified Single Family and Multifamily programs as identified in Attachment D. These investment levels include electric investment of \$5 million in 2024 and \$10 million in 2025 incremental to the Income-Qualified program investment in the Company's filed 2024-2025 EWR Plan.

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.

10. *Supplier Diversity.* Consumers Energy will report on supplier diversity spend (amount and percentage) and number of diverse suppliers in its EWR annual reconciliations. Diverse suppliers are defined as minority, women, veteran, service-disabled veteran, and LGBT+-owned business enterprises.

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. 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 Home Energy Report Program will account for no more than the lesser of 10% of the total portfolio savings or 21,000 MWh for electric and 240,000 Mcf for gas annually for 2024 and 2025.

13. *Income-Qualified Multifamily reporting.* Consumers Energy will report the multifamily data items set forth on Attachment B to this Settlement Agreement. Reporting of data is subject to modifications based on written agreement of the parties to this proceeding. Data collection, reporting and dissemination will be subject to any current or future Commission data and privacy regulations.

14. *Income-Qualified Multifamily program design.* Consumers Energy’s Income-Qualified Multifamily program will include the following:

- a. The Company will offer to pay contractors directly for work performed for some measures (e.g. air sealing and insulation) as property owner directed.

- b. When not paying a contractor directly, the program will offer the option of paying incentives in stages. For example, if the property is working in stages (by building or floor), the program will initiate payment at staged completion of installation if preferred by the property owner.
- c. Consumers Energy will work with Michigan Saves to support below-market rate bridge loans through Michigan Saves with terms between 12 months and 3 years, to bridge construction costs. Consumers Energy will meet at least twice per year with Michigan Saves to facilitate financing products appropriate for Income-Qualified Multifamily properties.
- d. Consumers Energy will endeavor to work with the Michigan State Housing Development Authority (“MSHDA”), at least once per quarter, to (a) encourage and/or require Low-Income Housing Tax Credit (“LIHTC”) applicants to include Consumers Energy’s Income-Qualified Multifamily program rebates in their applications and (b) identify likely potential LIHTC rehabilitation applicants at least 12 months in advance of their application to incorporate efficiency measures in their capital needs assessment (“CNA”)/physical needs assessment (“PNA”). Consumers Energy will support property owners in conducting an energy assessment when completing their building’s CNA/PNA and provide an incentive reservation letter to the applicant.
- e. Consumers Energy will increase outreach and marketing to Naturally Occurring Affordable Housing property owners including working with Michigan Saves, Community Economic Development Association of Michigan, and other community and housing groups in order to more directly reach this population.

- f. Consumers Energy will continue to expand outreach and engagement with Income-Qualified Multifamily residents and will provide leave behind material and encourage contractor networks to provide education to Income-Qualified Multifamily maintenance staff and/or relevant operations staff on how to properly operate and maintain new equipment.
- g. Consumers Energy will engage with third party green building certification programs, e.g. Passive House, National Green Building Standard, and similar, to ensure their awareness of Consumers Energy incentive program offerings, including offering ASHRAE Level I and II audits.
- h. For ASHRAE Level I and II audits offered to Income-Qualified Multifamily customers, Consumers Energy will research adding an electrification feasibility analysis to the assessment scopes, with a goal of including such an analysis to the assessment scopes in the Company's next EWR Plan.
- i. Consumers Energy will increase heat pump installations in Income-Qualified Multifamily projects, including through contractor and building owner marketing and education, with a goal of achieving 800 installations total across 2024 and 2025.

15. *Pilot Investment.* The parties agree that Consumers Energy's pilot spending cap will be increased to 7% with 2% dedicated to the Health and Safety pilot, described in paragraph 16. The parties further agree that the Company may utilize pilot funding to support efforts related to EWR program coordination (including programs created through the Inflation Reduction Act ("IRA"), Infrastructure Investment and Jobs Act ("IIJA"), or other legislation), workforce, trade

ally capacity, diversity, and development of operational frameworks and support to implement new legislation. This includes an analysis, and potential updating, of data reporting capabilities.

16. *Health and Safety Pilot.* The Health and Safety pilot will be accounted for in the pilot budget but administered as part of the Income-Qualified Single Family and Multifamily programs. The Company agrees to dedicate at least 25% of the Health and Safety budget to Income-Qualified Multifamily projects.

17. *Lighting + HVAC Pilot.* The Company will include a pilot program for networked lighting control and HVAC integration in commercial buildings. Such a pilot shall be designed in 2024 and launched no later than January 1, 2025. This pilot program will aim to demonstrate the additional energy savings possible from HVAC systems when their operation is informed by occupancy and schedule information provided by a Networked Lighting Control system.

18. *Flint Initiative and Geographic Targeting.* The parties agree that the Company will continue the Flint Initiative through 2025, develop and implement a geographic targeting protocol, and implement a second geographic targeting initiative as described in Attachment E to the Settlement Agreement.

19. *Michigan 211.* In furtherance of ensuring that payment assistance customers have access to and are informed about EWR program options, Consumers Energy will share a list of all available income-qualified programs, along with descriptions and contact information, with Michigan 211.

20. *Building Materials Tracking and Education.* The parties agree that Consumers Energy will continue providing training and education on the use of healthy insulation and air-sealing materials for contractors and will track the insulation and air sealant materials used in the Income-Qualified Single Family and Multifamily programs and Health and Safety Pilot.

21. *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 26.

22. *Building Envelope Measures.* During the 2024-2025 EWR Plan period, the Company will provide assistance with equipment acquisition and training and prepare to receive reports from weatherization contractors for the use of blower doors and infrared photography in support of building envelope improvement implementation and measurement and verification.

23. *Heat Pump Education and Awareness.* To support heat pump measure adoption efforts described in paragraph 21, the Company shall increase its heat pump education, trade ally training, and outreach across all relevant programs (both Income-Qualified and non-Income-Qualified). Specific activities shall minimally include:

- a. Communicating technology basics and setting customer expectations prior to the purchase of heat pump equipment.
- b. Aiding customer and trade ally product selection by providing information regarding various heat pump types, performance levels, capacity sizing, and interaction with existing heating systems.
- c. Developing leave behind materials for customers at the time of the initial sales visit and time of installation. The Company will develop drafts of the leave behind materials by May 1, 2024, and will share the draft materials with, and seek feedback from, Stakeholders.

- d. Continuing active participation in, and support of, the Michigan Heat Pump Collaborative.
- e. Including heat pumps as a service category on the Company's "Find a Contractor" page at <http://consumersenergyed.com/>. Contractors in the heat pump category must complete on-demand training modules offered by the Michigan Heat Pump Collaborative and be a manufacturer-authorized installer of eligible heat pump equipment.

24. *Engagement with Inflation Reduction Act Programs.* The Michigan Department of Environment, Great Lakes, and Energy ("EGLE") is expected to submit the state's plan for implementing the IRA's Home Energy Rebates program no later than January 31, 2025. EGLE is also expected to submit a plan for implementing the IRA's Home Electrification and Appliance Rebates program by August 2024. Between now and submission of those plans, EGLE is expected to seek input from interested parties. The Company commits to the following:

- a. Consumers Energy will encourage the state to implement a "one-stop shop" approach to implementation of the Home Energy Performance-Based Whole-House Rebates (also known as Home Owner Managing Energy Savings or "HOMES") and High-Efficiency Electric Home Rebate Act ("HEEHRA") programs, collectively referred to as Home Energy Rebates, that helps customers to leverage these rebates with other state, federal, and utility funding streams for whole-home retrofits, including at a minimum, pre-weatherization repairs (Health & Safety Pilot) and weatherization.
- b. If rebates become available during the 2024-2025 EWR Plan period, the Company will play an active role in marketing (through Company and/or trade

ally outreach and marketing channels, such as e-mail, social media, or in-person events) the federal rebate programs and/or the state's one-stop shop (if created) to its customers in order to make home improvement investments easier for customers and to both increase participation and lower costs per household of participation in the Company's EWR programs.

- c. The Company will encourage EGLE to prioritize treatment of low-income households by allocating more than the federally required 50% set-asides for such customers, as well as considering an additional set-aside for low-income multifamily buildings, in order to support advancement of equity objectives by increasing the number of low-income households receiving efficiency upgrades and increased participation in the state's low-income EWR programs while simultaneously lowering EWR program costs per household.
- d. The Company will encourage the state to make rebates accessible by using categorical eligibility and self-attestation for income verification.
- e. The Company will support the state in developing a plan for contractor outreach and training to include as part of its state plan. Consumers Energy will also provide education and outreach to currently approved Company contractors to ensure they are aware of all opportunities available to customers.
- f. The Company will market the availability of IRA tax credits, including the Energy Efficiency Home Improvement Tax Credit (25C) and the New Energy Efficiency Home Tax Credit for New Construction (45L), to its residential customers. Such marketing shall include applicable measure types, equipment eligibility, tax credit amount, and annual limits.

- g. The Company will also encourage heat pump and heat pump water heater product qualification consistent with product eligibility specified in the IRA. In addition to the Home Energy Rebate programs, the Company will work to leverage, integrate, and market other relevant IRA programs implemented by EGLE and other state agencies, localities, and organizations, such as MSHDA and Michigan Department of Health & Human Services, and will report on any leveraging of Home Energy Rebate programs and other IRA funds.
- h. The Company will report on the specific activities it has engaged in under (a)-(g) of this paragraph in its biannual update meetings with Stakeholders.

25. *Data Collection.* Consumers Energy agrees to establish a process for tracking and reporting the following aggregate EWR data items, and all relevant Income-Qualified, Multifamily, Flint Initiative, and Geotargeting data by census tract and to provide an update about that process to Stakeholders by January 30, 2025 – including, but not limited to, how the Company is incorporating census tract tracking into its data systems. Beginning in 1st quarter 2025, Consumers Energy will start tracking the following items by census tract and include interim findings in its 2025 reconciliation filing.

- a. Residential customer participation by census tract (measure type, measure quantity, incentive amount, savings by home/customer);
- b. Number of energy assistance customers (enrolled in a Consumers Energy assistance program) (1) participating in EWR; and (2) receiving EWR education and/or marketing; and

- c. Consumers Affordable Resource for Energy (“CARE”) referrals to the EWR Income-Qualified programs (Single Family and Multifamily breakdown, measures offered, measures installed, and marketing efforts by census tract).

Additionally, beginning in 1st quarter 2024, 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 be subject to current Commission data and privacy regulations and future Commission regulation on the collection, storage, and dissemination of customer information whether individual or in aggregate.

26. *Reporting.* Unless otherwise noted in this Agreement, Consumers Energy will provide reporting and status updates on data and reporting items and Settlement Agreement progress overall in biannual update meetings with Stakeholders and in annual reconciliation reports. Consumers Energy will also report implementation progress updates and an overview of its EWR plan at least annually to the MPSC’s Low-Income EWR Workgroup and EWR Collaborative, and other relevant spaces as requested – such as the Energy Affordability and Assistance Collaborative and the Low-Income Policy Board.

27. *Monthly, quarterly, or 45-day reporting.* Previously required monthly, quarterly, or 45-day reporting from Consumers Energy to Commission Staff on the status of program implementation will be on a voluntary basis going forward. Program implementation status will be reported to Commission Staff if, at any time throughout a program year, Consumers Energy expects to not meet legislative targets, IRP EWR targets, or targets established and approved in this case.

28. *Stakeholder Engagement.* The parties agree that Consumers Energy will continue its practice of consulting with 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.

29. This Settlement Agreement 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 Agreement 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.

30. This Settlement Agreement is based on the facts and circumstances of this case and is intended for the final disposition of Case No. U-21321. 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.

31. This Settlement Agreement 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.

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

33. 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 that the Commission approve this Settlement Agreement on an expeditious basis and make it effective in accordance with its terms by final order.

**MICHIGAN PUBLIC SERVICE
COMMISSION STAFF**

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CONSUMERS ENERGY COMPANY

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CONSUMERS ENERGY COMPANY

By: _____

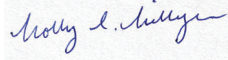
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Date: January 23, 2024

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



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ATTACHMENT A

MICHIGAN PUBLIC SERVICE COMMISSION
Consumers Energy Company

Case No.: U-21321
Exhibit No.: A-11 (KDH-1)
Page: 1 of 2
Witness: KDHarrington
Date: January 2024

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 for both Full Service and ROA customers each month.
- (2) For all eligible ~~Nonresidential~~ Non-Residential customers, the Energy Efficiency Program Surcharge will show on the bill as Other Surcharges 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 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 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 per billing meter and will show on the bill as Other Surcharges each 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 Surcharge level for their applicable rate based on the customer's average consumption for the previous year ~~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 ~~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 for both Full Service and ROA customers that qualify.

(Continued on Sheet No. C-66.00)

Issued XXXXXX XX, 2024 by
Garrick J. Rochow,
President and Chief Executive Officer,
Jackson, Michigan

Effective for bills rendered on and after
the Company's March 2024 Billing Month

Issued under authority of the
Michigan Public Service Commission
dated XXXXXX XX, 2024
in Case No. U-21321

MICHIGAN PUBLIC SERVICE COMMISSION
Consumers Energy Company

Case No.: U-21321
Exhibit No.: A-11 (KDH-1)
Page: 2 of 2
Witness: KDHarrington
Date: January 2024

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- 21312 <u>21321</u>) Effective beginning the <u>January</u> <u>March</u> 2024 Billing Month ⁽¹⁾⁽⁶⁾	Energy Efficiency Self-Directed Customer Surcharge (Case No. U- 21205 <u>21321</u>) Effective beginning the <u>January</u> <u>March</u> <u>2023</u> <u>2024</u> Billing Month ⁽⁶⁾⁽⁷⁾
Residential Rates	\$ 0.005720 <u>0.004527</u> /kWh	NA
Non-Residential Rates ⁽²⁾		
Tier 1: 0 – 2,000 kWh/mo.	\$ 8.36 <u>7.89</u> /billing meter	\$ 0.78 <u>1.06</u> /month
Tier 2: 2,001 – 5,000 kWh/mo.	55.06 <u>57.52</u> /billing meter	5.15 <u>7.77</u> /month
Tier 3: 5,001 – 10,000 kWh/mo.	121.26 <u>124.91</u> /billing meter	11.34 <u>16.87</u> /month
Tier 4: 10,001 – 30,000 kWh/mo.	287.27 <u>299.05</u> /billing meter	26.85 <u>40.41</u> /month
Tier 5: 30,001 – 50,000 kWh/mo.	694.54 <u>764.98</u> /billing meter	65.01 <u>103.62</u> /month
Tier 6: 50,001 – 75,000 kWh/mo.	1037.31 <u>1220.61</u> /billing meter	97.09 <u>165.88</u> /month
Tier 7: 75,0001 – 100,000 kWh/mo.	1426.15 <u>1757.05</u> /billing meter	133.48 <u>239.29</u> /month
Tier 8: 100,001 – 150,000 kWh/mo.	1580.35 <u>2086.89</u> /billing meter	147.92 <u>285.06</u> /month
Tier 9: 150,001 – 250,000 kWh/mo.	1842.36 <u>2421.28</u> /billing meter	172.44 <u>330.68</u> /month
Tier 10: >250,000 kWh/mo.	2010.26 <u>2661.88</u> /billing meter	173.84 <u>373.01</u> /month
Rate GSG-2 ⁽⁴⁾	NA	NA
Rate GML ⁽³⁾⁽⁵⁾	NA	NA
Rate GUL ⁽³⁾⁽⁵⁾	\$ 0.27/fixture per month ⁽³⁾	NA
Rate GU-LED	NA	NA
Rate GU	NA	NA
Rate PA	NA	NA
Rate ROA-R, ROA-S, ROA-P	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) Non-Residential Rates include GS, GSTU, GSD, GP, GPTU, GPD, EIP, LTILRR and LED.
- (3) 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.
- (4) Additional Rate Schedules can opt-in to the Energy Efficiency Program as described in Rule C12., Energy Efficiency.
- (5) Lighting rates that choose to opt-in to the Energy Efficiency Program shall be assessed \$0.27 per fixture per month.
- (6) 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.

Issued XXXXXX XX, 2024 by
Garrick J. Rochow,
President and Chief Executive Officer,
Jackson, Michigan

Effective for bills rendered on and after
the Company's March 2024 Billing Month

Issued under authority of the
Michigan Public Service Commission
dated XXXXXX XX, 2024
in Case No U-21321

MICHIGAN PUBLIC SERVICE COMMISSION
Consumers Energy Company

Case No.: U-21321
Exhibit No.: A-12 (KDH-1)
Page: 1 of 2
Witness: KDHarrington
Date: January 2024

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- 21312 <u>21321</u>) Effective beginning the January <u>March</u> 2024 Billing Month ^{(2) (3)}
Rate A	\$0.4243 <u>0.3359</u> /Mcf
Rate A-1	0.4243 <u>0.3359</u> /Mcf
Rate GS-1	0.5045 <u>0.6638</u> /Mcf
Rate GS-2	0.5045 <u>0.6638</u> /Mcf
Rate GS-3	
0 – 100,000 / Year	0.5045 <u>0.6638</u> /Mcf
> 100,000 / Year	0.0167 <u>0.0318</u> /Mcf
Rate GL	NA
Rate ST	
0 – 100,000 / Year	0.5045 <u>0.6638</u> /Mcf
> 100,000 / Year	0.0167 <u>0.0318</u> /Mcf
Rate LT	
0 – 100,000 / Year	0.5045 <u>0.6638</u> /Mcf
> 100,000 / Year	0.0167 <u>0.0318</u> /Mcf
Rate XLT	
0 – 100,000 / Year	0.5045 <u>0.6638</u> /Mcf
> 100,000 / Year	0.0167 <u>0.0318</u> /Mcf
Rate XXLT	
0 – 100,000 / Year	NA
> 100,000 / Year	0.0167 <u>0.0318</u> /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 for each rate will be shown as above on the monthly utility bill under Other Surcharges for all customers.

Issued XXXXXX XX, 2024 by
Garrick J. Rochow,
President and Chief Executive Officer,
Jackson, Michigan

Effective for bills rendered on and after
the Company's March 2024 Billing Month

Issued under authority of the
Michigan Public Service Commission
dated XXXXXX XX, 2024
in Case No U-21321

MICHIGAN PUBLIC SERVICE COMMISSION
Consumers Energy Company

Case No.: U-21321
Exhibit No.: A-12 (KDH-1)
Page: 2 of 2
Witness: KDHarrington
Date: January 2024

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.

Energy Efficiency Large Gas Transportation Opt-Out Program Surcharge ⁽¹⁾ (Case No. U-21205 21321) Effective beginning the January March 2023 2024	
Rate Schedule	<u>Billing Month</u>
Rate A	NA
Rate A-1	NA
Rate GS-1	NA
Rate GS-2	NA
Rate GS-3	NA
Rate GL	NA
Rate ST	
> 100,000 / Year	\$0.0038 0.0132/Mcf
Rate LT	
> 100,000 / Year	0.0038 0.0132/Mcf
Rate XLT	
> 100,000 / Year	0.0038 0.0132/Mcf
Rate XXLT	
> 100,000 / Year	0.0038 0.0132/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. 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 will be shown on the monthly utility bill under Other Surcharges for all customers.

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Garrick J. Rochow,
President and Chief Executive Officer,
Jackson, Michigan

Effective for bills rendered on and after
the Company’s March 2024 Billing Month

Issued under authority of the
Michigan Public Service Commission
dated XXXXXX XX, 2024
in Case No U-21321

ATTACHMENT B

Attachment B: Income-Qualified Multifamily Program Reporting

The following Income-Qualified Multifamily Program 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 status update on its Income-Qualified Multifamily Program and the below reporting items to Stakeholders in the biannual update meeting discussed in paragraph 26 of this Settlement Agreement. The Company will also provide Income-Qualified Multifamily Program status updates at the EWR Collaborative and EWR Low Income Workgroup at least annually. Data reporting may be changed upon mutual written agreement between the Company and Stakeholders.

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 a Level I energy assessment
- # of properties that received a Level II energy assessment
- # of properties that installed 2 or more prescriptive or custom measures
- # of Subsidized and Unsubsidized properties participating (may be quantified through analysis)

Measure Level Data

- # of properties reported above that received incentives in the following categories, broken down by measure type:
 - HVAC – furnaces, boilers, heat pumps, central AC, window AC, insulation, air sealing, windows
 - Lighting – in unit and common area, prescriptive/custom, exterior
 - Water heating
 - Appliances – refrigerators, clothes washer, clothes dryer
 - Custom
- Conversion rates
 - Overall conversion rate (i.e. what % of projects moved from assessment to custom/prescriptive) separately for:
 - Program outreach staff started projects
 - Contractor started projects
 - Track measure recommendations for energy assessment reports

Investment Data

- Total incentive spending by fuel
- Total non-incentive spending by fuel

Savings Data

- MWh savings achieved in paid projects
- Mcf savings achieved in paid projects
- In the annual reconciliation process, Consumers Energy will calculate the average % savings of total energy per property (by fuel) for a statistically-informative random sample of weatherization projects and will report the results after the analysis is completed.

Outreach Data

- # of conversations with MSHDA staff
- Total properties contacted
- Total inquiries received from properties through website/email
- Information on Income-Qualified Multifamily collaborative efforts presented in coordination with DTE

ATTACHMENT C

Attachment C

2024 - 2025 Energy Efficiency Plan Performance Metrics
Electric Service

Line No.	Performance Metric	Description	Weight	Year	Performance Requirements		Financial Incentive ⁽¹⁾ (2) (% of Investment)		Explanation
					Minimum	Maximum	Minimum	Maximum	
1	Lifetime Energy Savings	Lifetime MWh savings for exceeding 1.5% annual reduction (based on a sliding scale)	80.00%	2024	4,439,137 MWh	6,727,759 MWh	12.00%	16.00%	Incentive to promote long life measures.
				2025	4,410,006 MWh	6,683,609 MWh			
2	Low Income Investment ⁽³⁾	Investment in low income programs	10.00%	IQ 2024	\$ 9,010,000	\$ 10,600,000	1.20%	2.00%	Incentive to promote investing in energy savings measures for low-income customers.
				MF 2024	\$ 10,023,393	\$ 11,792,227			
				IQ 2025	\$ 9,350,000	\$ 11,000,000			
				MF 2025	\$ 10,700,965	\$ 12,589,370			
3	Low Income Targeted Measures ⁽⁴⁾	Installations of Targeted Measures for income qualified customers.	15.00%	2024	5,154	7,731	1.80%	3.00%	Promotes adoption of an energy efficient primary heat source for income qualified customers.
				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 in single-family or multifamily buildings that are electrically heated or have air-conditioning and non-Consumers fossil fuel heat (gas or propane). 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.

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 (\$)			Metric 3: Low Income Targeted Measure Installations		
			Minimum Basis (150%) Year 2024 = 4,439,137 Year 2025 = 4,410,006				Minimum Basis (85%) Year 2024 = \$19,033,393 Year 2025 = \$20,050,965			Min Basis (100%) to Max Basis Year 2024 = 5,154 - 7,731 Year 2025 = 6,221 - 9,332		
			Savings weighted at 80%				Weighted at 10%			Weighted at 15%		
	% Savings	% Incentive		Weight	Measure Life	% Incentive		Weight	% Incentive		Weight	% Incentive
Tier 1	1.00%	15.00%	Tier 1	100%	9.00	12.00%	Tier 1	85.00%	1.20%	Tier 1	100%	1.80%
	1.01%	15.10%		101%	9.02	12.08%		85.30%	1.22%		101%	1.82%
	1.02%	15.20%		102%	9.05	12.16%		85.60%	1.23%		102%	1.85%
	1.03%	15.30%		103%	9.07	12.24%		85.90%	1.25%		103%	1.87%
	1.04%	15.40%		104%	9.10	12.32%		86.20%	1.26%		104%	1.90%
	1.05%	15.50%		105%	9.12	12.40%		86.50%	1.28%		105%	1.92%
	1.06%	15.60%		106%	9.15	12.48%		86.80%	1.30%		106%	1.94%
	1.07%	15.70%		107%	9.17	12.56%		87.10%	1.31%		107%	1.97%
	1.08%	15.80%		108%	9.20	12.64%		87.40%	1.33%		108%	1.99%
	1.09%	15.90%		109%	9.22	12.72%		87.70%	1.34%		109%	2.02%
	1.10%	16.00%		110%	9.25	12.80%		88.00%	1.36%		110%	2.04%
	1.11%	16.10%		111%	9.27	12.88%		88.30%	1.38%		111%	2.06%
	1.12%	16.20%		112%	9.30	12.96%		88.60%	1.39%		112%	2.09%
	1.13%	16.30%		113%	9.32	13.04%		88.90%	1.41%		113%	2.11%
	1.14%	16.40%		114%	9.34	13.12%		89.20%	1.42%		114%	2.14%
	1.15%	16.50%		115%	9.37	13.20%		89.50%	1.44%		115%	2.16%
	1.16%	16.60%		116%	9.39	13.28%		89.80%	1.46%		116%	2.18%
	1.17%	16.70%		117%	9.42	13.36%		90.10%	1.47%		117%	2.21%
	1.18%	16.80%		118%	9.44	13.44%		90.40%	1.49%		118%	2.23%
	1.19%	16.90%		119%	9.47	13.52%		90.70%	1.50%		119%	2.26%
	1.20%	17.00%		120%	9.49	13.60%		91.00%	1.52%		120%	2.28%
	1.21%	17.10%		121%	9.52	13.68%		91.30%	1.54%		121%	2.30%
	1.22%	17.20%		122%	9.54	13.76%		91.60%	1.55%		122%	2.33%
	1.23%	17.30%		123%	9.57	13.84%		91.90%	1.57%		123%	2.35%
	1.24%	17.40%		124%	9.59	13.92%		92.20%	1.58%		124%	2.38%
Tier 2	1.25%	17.50%	Tier 2	125%	9.61	14.00%	Tier 2	92.50%	1.60%	Tier 2	125%	2.40%
	1.26%	17.60%		126%	9.64	14.08%		92.80%	1.62%		126%	2.42%
	1.27%	17.70%		127%	9.66	14.16%		93.10%	1.63%		127%	2.45%
	1.28%	17.80%		128%	9.69	14.24%		93.40%	1.65%		128%	2.47%
	1.29%	17.90%		129%	9.71	14.32%		93.70%	1.66%		129%	2.50%
	1.30%	18.00%		130%	9.74	14.40%		94.00%	1.68%		130%	2.52%
	1.31%	18.10%		131%	9.76	14.48%		94.30%	1.70%		131%	2.54%
	1.32%	18.20%		132%	9.79	14.56%		94.60%	1.71%		132%	2.57%
	1.33%	18.30%		133%	9.81	14.64%		94.90%	1.73%		133%	2.59%
	1.34%	18.40%		134%	9.84	14.72%		95.20%	1.74%		134%	2.62%
	1.35%	18.50%		135%	9.86	14.80%		95.50%	1.76%		135%	2.64%
	1.36%	18.60%		136%	9.89	14.88%		95.80%	1.78%		136%	2.66%
	1.37%	18.70%		137%	9.91	14.96%		96.10%	1.79%		137%	2.69%
	1.38%	18.80%		138%	9.93	15.04%		96.40%	1.81%		138%	2.71%
	1.39%	18.90%		139%	9.96	15.12%		96.70%	1.82%		139%	2.74%
	1.40%	19.00%		140%	9.98	15.20%		97.00%	1.84%		140%	2.76%
	1.41%	19.10%		141%	10.01	15.28%		97.30%	1.86%		141%	2.78%
	1.42%	19.20%		142%	10.03	15.36%		97.60%	1.87%		142%	2.81%
	1.43%	19.30%		143%	10.06	15.44%		97.90%	1.89%		143%	2.83%
	1.44%	19.40%		144%	10.08	15.52%		98.20%	1.90%		144%	2.86%
	1.45%	19.50%		145%	10.11	15.60%		98.50%	1.92%		145%	2.88%
	1.46%	19.60%		146%	10.13	15.68%		98.80%	1.94%		146%	2.90%
	1.47%	19.70%		147%	10.16	15.76%		99.10%	1.95%		147%	2.93%
	1.48%	19.80%		148%	10.18	15.84%		99.40%	1.97%		148%	2.95%
	1.49%	19.90%		149%	10.21	15.92%		99.70%	1.98%		149%	2.98%
Tier 3	1.50%	20.00%	Tier 3	150%	10.23	16.00%	Tier 3	100.00%	2.00%	Tier 3	150%	3.00%

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.

Attachment C

2024 - 2025 Energy Efficiency Plan Performance Metrics
Gas Service

Line No.	Performance Metric	Description	Weight	Year	Performance Requirements		Financial Incentive ⁽¹⁾ (²) (% of Investment)		Explanation
					Minimum	Maximum	Minimum	Maximum	
1	Lifetime Energy Savings	Lifetime Mcf savings for exceeding 0.75% annual reduction (based on a sliding scale).	80.00%	2024	23,312,520 Mcf	31,083,353 Mcf	12.00%	16.00%	Incentive to promote long life measures.
				2025	23,220,850 Mcf	30,961,126 Mcf			
2	Low Income Investment ⁽³⁾	Investment in low income programs.	10.00%	IQ	2024	\$ 17,850,000	\$ 21,000,000	1.20%	Incentive to promote investing in energy savings measures for low-income customers.
				MF	2024	\$ 8,925,000	\$ 10,500,000		
				IQ	2025	\$ 18,103,300	\$ 21,298,000		
				MF	2025	\$ 9,180,000	\$ 10,800,000		
3	Low Income Targeted Measures Installed ⁽⁴⁾	Number of premium measures installed for income qualified.	15.00%	2024	10,365	15,547	1.80%	3.00%	Incentive to promote installation of targeted measures in single and multifamily income qualified units.
				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.

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 - (\$)			Metric 3: Number Low Income Targeted Measures Installed		
			Minimum Basis (100%) Year 2024 = 23,312,520 Year 2025 = 23,220,850			Minimum (85%) Year 2024 = \$26,775,000 Year 2025 = \$27,283,300			Min Basis (100%) to Max Basis Year 2024 = 10,365 - 15,547 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%	15.10%		100.7%	12.08%		85.3%	1.216%		101.0%	1.824%
	0.760%	15.20%		101.3%	12.16%		85.6%	1.232%		102.0%	1.848%
	0.765%	15.30%		102.0%	12.24%		85.9%	1.248%		103.0%	1.872%
	0.770%	15.40%		102.7%	12.32%		86.2%	1.264%		104.0%	1.896%
	0.775%	15.50%		103.3%	12.40%		86.5%	1.280%		105.0%	1.920%
	0.780%	15.60%		104.0%	12.48%		86.8%	1.296%		106.0%	1.944%
	0.785%	15.70%		104.7%	12.56%		87.1%	1.312%		107.0%	1.968%
	0.790%	15.80%		105.3%	12.64%		87.4%	1.328%		108.0%	1.992%
	0.795%	15.90%		106.0%	12.72%		87.7%	1.344%		109.0%	2.016%
	0.800%	16.00%		106.7%	12.80%		88.0%	1.360%		110.0%	2.040%
	0.805%	16.10%		107.3%	12.88%		88.3%	1.376%		111.0%	2.064%
	0.810%	16.20%		108.0%	12.96%		88.6%	1.392%		112.0%	2.088%
	0.815%	16.30%		108.7%	13.04%		88.9%	1.408%		113.0%	2.112%
	0.820%	16.40%		109.3%	13.12%		89.2%	1.424%		114.0%	2.136%
	0.825%	16.50%		110.0%	13.20%		89.5%	1.440%		115.0%	2.160%
	0.830%	16.60%		110.7%	13.28%		89.8%	1.456%		116.0%	2.184%
	0.835%	16.70%		111.3%	13.36%		90.1%	1.472%		117.0%	2.208%
	0.840%	16.80%		112.0%	13.44%		90.4%	1.488%		118.0%	2.232%
	0.845%	16.90%		112.7%	13.52%		90.7%	1.504%		119.0%	2.256%
	0.850%	17.00%		113.3%	13.60%		91.0%	1.520%		120.0%	2.280%
	0.855%	17.10%		114.0%	13.68%		91.3%	1.536%		121.0%	2.304%
	0.860%	17.20%		114.7%	13.76%		91.6%	1.552%		122.0%	2.328%
	0.865%	17.30%		115.3%	13.84%		91.9%	1.568%		123.0%	2.352%
	0.870%	17.40%		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%	17.60%		117.3%	14.08%		92.8%	1.616%		126.0%	2.424%
	0.885%	17.70%		118.0%	14.16%		93.1%	1.632%		127.0%	2.448%
	0.890%	17.80%		118.7%	14.24%		93.4%	1.648%		128.0%	2.472%
	0.895%	17.90%		119.3%	14.32%		93.7%	1.664%		129.0%	2.496%
	0.900%	18.00%		120.0%	14.40%		94.0%	1.680%		130.0%	2.520%
	0.905%	18.10%		120.7%	14.48%		94.3%	1.696%		131.0%	2.544%
	0.910%	18.20%		121.3%	14.56%		94.6%	1.712%		132.0%	2.568%
	0.915%	18.30%		122.0%	14.64%		94.9%	1.728%		133.0%	2.592%
	0.920%	18.40%		122.7%	14.72%		95.2%	1.744%		134.0%	2.616%
	0.925%	18.50%		123.3%	14.80%		95.5%	1.760%		135.0%	2.640%
	0.930%	18.60%		124.0%	14.88%		95.8%	1.776%		136.0%	2.664%
	0.935%	18.70%		124.7%	14.96%		96.1%	1.792%		137.0%	2.688%
	0.940%	18.80%		125.3%	15.14%		96.4%	1.808%		138.0%	2.712%
	0.945%	18.90%		126.0%	15.12%		96.7%	1.824%		139.0%	2.736%
	0.950%	19.00%		126.7%	15.20%		97.0%	1.840%		140.0%	2.760%
	0.955%	19.10%		127.3%	15.28%		97.3%	1.856%		141.0%	2.784%
	0.960%	19.20%		128.0%	15.36%		97.6%	1.872%		142.0%	2.808%
	0.965%	19.30%		128.7%	15.44%		97.9%	1.888%		143.0%	2.832%
	0.970%	19.40%		129.3%	15.52%		98.2%	1.904%		144.0%	2.856%
	0.975%	19.50%		130.0%	15.60%		98.5%	1.920%		145.0%	2.880%
	0.980%	19.60%		130.7%	15.68%		98.8%	1.936%		146.0%	2.904%
	0.985%	19.70%		131.3%	15.76%		99.1%	1.952%		147.0%	2.928%
	0.990%	19.80%		132.0%	15.84%		99.4%	1.968%		148.0%	2.952%
	0.995%	19.90%		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

ATTACHMENT D

Attachment D

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

		(a)	(b)	(c)	(d)
<u>Line No.</u>	<u>Description</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>
1	Retail Electric Sales ^(1)	32,737,213	32,882,498	32,666,713	32,791,051
2	Prior Year Weather Normal Sales		32,737,213	32,882,498	32,666,713
3	Electric Statutory Savings Percentage		1.0%	1.0%	1.0%
4	Electric Statutory Savings Target		327,372	328,825	326,667

Notes:

(1) Exhibit A-4 (EMB-1), column g

Attachment D

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

		(a)	(b)	(c)	(d)
Line No.	Description	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>
1	Retail Gas Sales Sales ^(1)	308,722,273	311,350,000	310,374,000	309,394,000
2	Electric Generation Gas Sales ⁽²⁾	19,253,256	23,807,351	23,962,036	23,942,230
3	Total Adjusted Gas Sales	289,469,017	287,542,649	286,411,964	285,451,770
2	Prior Year Weather Normal Sales		289,469,017	287,542,649	286,411,964
4	Gas Statutory Savings Percentage		0.75%	0.75%	0.75%
5	Gas Statutory Savings Target		2,171,018	2,156,570	2,148,090

Notes:

(1) Exhibit A-5 (EMB-2), column (g).

(2) Exhibit A-5 (EMB-2), column (h)

Attachment D
Electric

Line No.	Description	Investments		First Year Energy Savings		Lifetime Energy Savings	
		2024	2025	2024	2025	2024	2025
		(\$)	(\$)	(MWh)	(MWh)	(MWh)	(MWh)
Residential Class							
1	Appliance Recycling	\$ 9,701,706	\$ 9,495,331	32,704	32,704	254,562	254,562
2	Assessments and Behavior	6,000,000	5,262,804	24,629	24,014	59,694	47,187
3	Contractor Rebates - Res	3,840,071	3,801,636	2,664	2,714	39,615	40,063
4	Income-Qualified Energy Assistance	13,600,000	17,000,000	31,574	35,964	257,690	269,655
5	Income-Qualified Multifamily	13,792,227	16,589,370	13,328	15,459	126,023	128,350
6	Market Rate Multifamily	3,938,945	3,866,591	5,389	5,389	46,294	46,294
7	New Home Construction	979,173	866,214	1,954	1,562	39,081	31,239
8	Retail Rebates	2,821,671	2,798,779	6,441	6,441	57,908	57,911
9	Think! Energy	1,400,900	1,392,850	5,711	5,711	57,889	57,889
10	Residential Pilot Programs ⁽¹⁾	4,801,705	4,755,511	9,170	9,097	73,014	72,578
11	Residential Subtotal	\$ 60,876,398	\$ 65,829,087	133,565	139,054	1,011,770	1,005,727
Business Class							
12	Prescriptive Solutions	\$ 70,321,683	\$ 62,501,949	368,771	350,436	4,602,607	4,372,579
13	Custom Solutions	4,987,589	4,798,688	64,406	74,906	672,014	672,014
14	Energy Assessments	7,800,000	7,703,669	9,457	9,457	65,028	65,028
15	Contractor Rebates - Bus	7,040,000	7,021,778	24,071	24,071	169,481	169,481
16	Small Business Store	682,255	665,710	3,340	3,440	32,335	33,305
17	Business Pilot Programs ⁽¹⁾	8,563,105	7,846,699	35,081	33,663	431,003	413,187
18	Business Subtotal	\$ 99,394,631	\$ 90,538,492	505,127	495,973	5,972,468	5,725,595
Support Services							
19	Utility Oversight	\$ 22,688,640	\$ 21,840,000	-	-	-	-
20	Tracking System	-	-	-	-	-	-
21	Education and Awareness ⁽¹⁾	5,727,775	5,400,947	18,965	18,326	216,007	208,185
22	EM&V	7,238,400	6,423,040	-	-	-	-
23	Support Services Subtotal	\$ 35,654,815	\$ 33,663,987	18,965	18,326	216,007	208,185
24	Total Energy Efficiency Portfolio	\$ 195,925,844	\$ 190,031,566	657,656	653,353	7,200,245	6,939,507

(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.

Attachment D
Gas

Line No.	Description	Investments		First Year Energy Savings		Lifetime Energy Savings	
		2024	2025	2024	2025	2024	2025
		(\$)	(\$)	(Mcf)	(Mcf)	(Mcf)	(Mcf)
Residential Class							
1	Appliance Recycling	\$ -	\$ -	-	-	-	-
2	Assessments and Behavior	5,000,000	5,345,906	294,739	320,232	1,126,036	1,151,529
3	Contractor Rebates - Res	11,657,067	11,608,160	290,419	293,558	4,555,474	4,606,251
4	Income-Qualified Energy Assistance	21,000,000	21,298,000	169,487	169,487	1,939,460	1,939,460
5	Income-Qualified Multifamily	10,500,524	10,802,834	93,547	90,743	889,688	842,763
6	Market Rate Multifamily	2,802,141	2,803,658	184,218	183,454	1,284,697	1,274,408
7	New Home Construction	1,142,089	958,980	67,257	51,326	1,345,149	1,026,519
8	Retail Rebates	3,599,909	3,504,379	129,428	129,478	982,414	983,578
9	Think! Energy	1,073,132	1,069,546	131,542	131,542	757,770	757,770
10	Residential Pilot Programs ⁽¹⁾	4,702,583	4,734,597	105,827	106,541	609,638	613,752
11	Residential Subtotal	\$ 61,477,446	\$ 62,126,061	1,466,465	1,476,361	13,490,326	13,196,030
Business Class							
12	Prescriptive Solutions	\$ 14,658,228	\$ 14,433,683	774,973	774,973	10,854,930	10,854,930
13	Custom Solutions	3,690,440	3,686,576	298,395	298,395	4,475,920	4,475,920
14	Energy Assessments	4,680,000	4,250,859	200,850	200,850	1,406,985	1,406,985
15	Contractor Rebates - Bus	-	-	-	-	-	-
16	Small Business Store	92,385	90,225	5,808	5,983	41,367	42,608
17	Business Pilot Programs ⁽¹⁾	1,981,551	1,920,052	99,558	99,571	1,305,049	1,305,146
18	Business Subtotal	\$ 25,102,604	\$ 24,381,394	1,379,584	1,379,771	18,084,251	18,085,589
Support Services							
19	Utility Oversight	\$ 4,581,360	\$ 4,410,000	-	-	-	-
20	Tracking System	-	-	-	-	-	-
21	Education and Awareness ⁽¹⁾	2,864,629	2,851,992	88,022	88,334	988,663	978,757
22	EM&V	1,461,600	1,296,960	-	-	-	-
23	Support Services Subtotal	\$ 8,907,589	\$ 8,558,952	88,022	88,334	988,663	978,757
24	Total Energy Efficiency Portfolio	\$ 95,487,640	\$ 95,066,407	2,934,071	2,944,466	32,563,240	32,260,376

(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.

ATTACHMENT E

Attachment E: Flint Initiative and Geotargeting

As used in Attachment E, the term “Stakeholders” has the same definition as the one provided in the recitals to this Settlement Agreement. For purposes of Attachment E only, the term “Interested Parties” refers to other interested parties identified by Stakeholders and other interested parties identified by the Company.

1. The Company agrees to continue the Flint Initiative through 2025, investing an additional \$2,250,000 during the 2024-2025 EWR Plan period, incremental to the \$1 million Flint Initiative budget stated in the Settlement Agreement in Case No. U-20875. This amount includes a minimum \$250,000 investment from the Health and Safety Pilot budget. This budget will not be used for non-emergency replacement of gas appliances. The Flint Initiative will continue to be administered through the Income-Qualified Single Family and Multifamily programs and will incorporate the Health and Safety Pilot.
2. The Flint Initiative priority area will be refined to target at the census tract level.
 - a. Building on the Low Income Needs Assessment (“LINA”) conducted pursuant to the Settlement Agreement in Case No. U-20875, the Company agrees to reevaluate the LINA prioritization scenarios at the census tract level within the target Flint ZIP Codes (identified in the Case No. U-20875 Settlement Agreement). The Company will also consider using additional information along with census tract to include in the analysis.
 - b. Upon completion of the evaluation set forth in (a), the Company will present to Stakeholders and Interested Parties, results of the census tract analysis and the proposed high-priority Flint census tracts.
 - c. By June 2024, the Company will refine its targeting approach in Flint to reach customers in the high-priority census tracts.
 - d. All data collection and reporting will comply with current and future Commission data governance and data privacy regulation.
3. The Company will work with trusted messengers in Flint and with local organizations to implement a grassroots outreach plan.
 - a. The EWR Program team will work with the Company’s Flint area Community Affairs representatives and the Income-Qualified program Nonprofit Engagement Specialist to develop and implement a 2024-2025 outreach plan. The Company will present the outreach plan, once it is developed, to Stakeholders and Interested Parties.
 - b. The Company’s Flint area Community Affairs team will be engaged in Flint Initiative outreach activities, utilizing their standing in the community to inform and educate Flint leadership (including local government, school administrators,

and nonprofit program leadership) about EWR program activities and to encourage participation in EWR efforts.

- c. Outreach and marketing will include the following strategies: informing city council members in Flint about the Income-Qualified programs, advertising the Income-Qualified programs in local media and newspapers, and flyers to faith-based and community-based organizations.
- d. The Company will provide outreach/education materials to Income-Qualified Multifamily owners and renters in Flint Initiative targeted areas.

4. Evaluation

- a. The Company will complete the Flint community organization interview and Flint customer surveys evaluation projects.
- b. By February 29, 2024, the Company will provide to Stakeholders and Interested Parties a proposed evaluation plan for measuring bill impacts and changes in energy affordability attributable to the Flint Initiative. The evaluation plan will include the data to be collected and the timeline for data collection and data analysis. The evaluation plan will include assessment of payment performance. The Company will solicit and incorporate input from Stakeholders and Interested Parties before finalization by April 1, 2024.
- c. The Company will provide evaluation updates in the mid-year update and annual reconciliation filings.

5. Consumers Energy will provide heat pump education and outreach that includes activities set out in paragraph 23 of the Settlement Agreement and will work towards a goal of installing at least 50 heat pump installations per year, in combination with any needed weatherization improvements, in income-qualified, electric-resistance heated properties (single family and/or multifamily) within the target areas for the Flint Initiative. For purposes of this paragraph, target areas may include the priority Flint ZIP Codes identified in the Settlement Agreement in Case No. U-20875: 48502, 48503, 48504, 48505, 48506, and 48507. Multifamily installations can count toward the heat pump target for Income-Qualified Multifamily properties set forth in paragraph 14(i) of the Settlement Agreement.

6. The Company will seek (through the EWR Low Income Workgroup and other networks within its service territory) to identify governmental or not-for-profit organizational partners who would be eligible for and interested in applying for new funding to fill gaps needed for whole-home retrofits in the geotargeted areas in the Flint Initiative and second geotargeted initiative in cooperation with the Company's Income-Qualified programs. Such funds could be dedicated to the Company's existing partnerships with the Flint Initiative that are successful but need additional funds. Consumers Energy will support partner grant proposals to be submitted during the years of this EWR Plan filing (2024-2025) and will report on efforts to secure additional community funding in mid-year updates and the EWR annual report.

7. Geotargeting Protocol

- a. The Company will develop a geographic targeting protocol to choose subsequent locations for targeted initiatives. The Company will present the proposed protocol to Stakeholders and Interested Parties by June 30, 2024, and finalize the protocol by September 30, 2024.
 - b. The Company will build upon the LINA conducted pursuant to the Settlement Agreement in Case No. U-20875 to perform census tract-level analysis to inform identification of high-priority census tracts to consider for a second geotargeted initiative. Results of this analysis will be shared with Stakeholders and Interested Parties no later than June 2024.
 - c. The Company will work with Stakeholders and Interested Parties and engage its Community Affairs team, Income-Qualified program implementers, and community partners and contractors working in the potential communities to inform the geotargeting selection process and select one (1) community for further evaluation. If more than one community shows need, interest, and potential for success, Consumers Energy will retain the information gathered to be considered in developing a potential third initiative in the 2026-27 plan year.
 - d. The Company will then hold input sessions with Interested Parties in the potential high-priority community. The goal of the input sessions will be to determine the barriers, needs, and likelihood of success of a geotargeted initiative in the community. Topics for input will include whether community members are interested in the initiative and whether partner organizations and contractors have the capacity to support the initiative; which census tracts to prioritize in the community; and which marketing strategies are likely to be successful in engaging customers in the potential locations. Consumers Energy will work with Stakeholders to identify Interested Parties and develop questions for input.
 - e. The Company will launch its second geographic targeting initiative by March 31, 2025.
8. Data collection and reporting. The Company agrees to collect the following data for the 2024-2025 Flint Initiative and the second geotargeted initiative, and to report on this data in biannual updates (mid-year and annual reconciliation).
- a. Customers served/energy savings
 - b. Deferrals identified
 - c. Disconnections
 - d. Breakdown of measures installed
 - e. Average incentive per customer
 - f. Customers in arrears receiving outreach
 - g. Customers in arrears participating in EWR
 - h. Number of home assessments
 - i. Consumers Energy funding source per household (Health and Safety, Company Energy Assistance, and EWR)

- j. How customers learned about the program
 - k. Type of outreach
 - l. For Health and Safety participants:
 - i. Health impacts
 - ii. Average spend per customer
 - iii. EWR measures installed after Health and Safety improvements
 - iv. Customers in arrears
 - v. Repairs completed (i.e. deferrals resolved)
 - m. Cost of outreach implementation (total and average/customer)
 - n. Cycle Time (assessment date to completion date)
 - o. Customer decline data including reasons for not completing EWR installation (may be provided through evaluation/survey)
 - p. Qualitative feedback from contractor(s) and implementing partner(s) about their experience with the Flint Initiative and/or second geotargeted initiative
 - q. Tracking of community partner funding assistance efforts
9. Workforce Development/Educational Opportunities for Geotargeting Initiatives
- a. Consumers will offer the following educational opportunities to potential participants in their geotargeting initiatives including block groups and other community groups (may be done in partnership with implementing partners; public funds may be used).
 - i. Simple DIY weatherization;
 - ii. How to access energy efficiency measure rebates;
 - iii. Federal funding opportunities (e.g. Environmental Justice Block Grants, IRA/IIJA funding).
 - b. In addition, Consumers Energy will: (a) continue to support and promote its Workforce Development Pilot to help develop a growing pipeline of workers trained to provide weatherization services and heat pumps; and (b) leverage IRA funds to address workforce development.

PROOF OF SERVICE

STATE OF MICHIGAN)

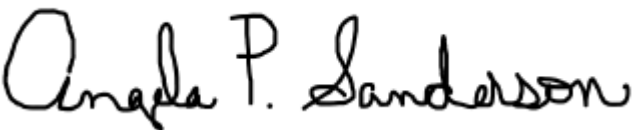
Case No. U-21321

County of Ingham)

Brianna Brown being duly sworn, deposes and says that on February 8, 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 8th day of February 2024.



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

Service List for Case: U-21321

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