

Instructions for Completing the WEATHER NORMALIZED Self Directed plan (2011)

Dates to remember:

- This plan should be submitted and postmarked by October 15, 2010
- Utility notification of deficiencies should be mailed and postmarked by November 5, 2010
- Final Plan, with deficiencies remedied should be submitted and postmarked by November 30, 2010
- Exemption from most EO surcharges will begin January 1, 2011

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 Optimization Services Company to develop and implement a self-directed plan.

Step 1

This application applies to weather correction using the Weather Normalization of 2009 usage. If weather correction will be by using the three year average,

- 1 please complete the application titled "3 YEAR AVERAGE".

Step 2

- 2 Only input data for the years covered by your plan. Example: Do not input data for year 2014 if your plan covers 2011-2012

Step 3

- 3 Complete "Form" tab
- 4 Complete "Detail Table-Weath Norm" tab (Total planned savings must exceed the total minimum savings and can be from any combination of sites.)
- 5 Complete the "Plan Outline" tab
- 6 Complete "Business Activity Adjustments" tab, if applicable
- 7 Complete the "Weather Factor" tab
- 8 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.
- 9 Row numbering can be repaired on all except the "form" tab by copying and pasting cell A2 down the sheet.
- 10 New sites that you do not have a full year's energy usage: Provide reasonable estimates of annual energy usage and peak demand. Suggestions: a) use MWh/square foot of a typical facility of your 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 you have a few months of occupied electric usage extrapolate it out for the entire year. Amend your plan when actual data becomes available.
- 11 **Printing** : To coordinate page numbering, use the following print options; >File, >print, > entire work book

References:

- 1 Self Direct Plan rules can be found in the temporary order (Case U-15800) issued by the MPSC on Dec. 4, 2008
Link: <http://efile.mpsc.state.mi.us/efile/docs/15800/0001.pdf>
 - Pages 35 to 37 of the order include information on "Self-Directed Energy Optimization Plans"
 - Pages 7 to 13 of Attachment E, covers Section 4. "Self-Directed Energy Optimization Plan for Electric Customers"

Notes:

1) The commission has not yet finalized EO rules. It is proposed that customers be allowed to carry excess savings forward one year in an amount equal to 1/3 of the next year's minimum savings based on the EO standard. You may elect to use this option just be aware that the rules are still subject to change. Please clearly state in your plan outline any savings carried forward. Show them as being deleted from planned savings in the year achieved and added "carried forward saving from year ____" in the following year.

Self Directed Energy Optimization (EO) Plan - Plan Year 2011

Submit completed form by October 15, 2010

3 **Qualifications:** 1 MW single site or, _____ 5 MW sites aggregated, # of sites aggregated _____

4 **Legal Name of business:** DEF Company Inc.

5 **Mailing Address of Signatory:** 456 Main Street, Flint, MI 48555

6 **Business phone number:** (248) 234-5678 Fax number: (248) 234-7895 e-mail: Testone@Test.com

7 **Term of the Self-directed application (2 to 5 yrs):** 3 years

8 **Date when customer will begin to or began to implement the plan at the first site:** January 1, 2011
(coincides with exemption from energy optimization charges at all sites.)

9 **Basis for calculating savings:** Weather-normalized

Weather Normalized - 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 (adjusted for changes in business activity and weather normalized) (b)	Minimum Annual Savings to meet the EO Performance Standard (MWh) (c) = (a) x (b)	Planned (targeted) Annual Energy Savings in MWh (normalized) no less than (c)
2011	0.75%	11,829	88.7	96.0
2012	1.00%	12,082	120.8	135.0
2013	1.00%	12,082	120.8	121.0
2014	1.00%	0	0.0	0.0
2015	1.00%	0	0.0	0.0

At a Minimum, all areas shown on this page with RED letters or numbers must be completed.

20 **Remedy of Plan Deficiency:** The provider will notify the customer of any deficiency. The customer must remedy the deficiency by Nov 30, 2010

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

23 **Customer:**

24 Authorized Name (print): James Sample

25 Signature: James Sample (formal signature required)

26 Title: Manager of Operations

27 Date: November 2, 2009

28 e-mail: Testone@Test.com fax: (248) 234-7895

30 **Additional Customer Contact (optional):**

31 Name: _____

32 Title: _____

33 e-mail: _____ fax: _____

34 Phone: _____

Energy Optimization Service Company, if required*

Authorized Name (print): _____

Signature: _____

Title: _____

Date: _____ e-mail: _____

Phone: _____ fax: _____

* Customers are required to use the services of an energy optimization 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.

Provider Contact Information: (optional):

Name: _____ Phone: _____

Title: _____ fax: _____

e-mail: _____

1 DEF Company Inc. Weather Normalized 2011 Plan Year (Minimum Performance Standard 0.75%)

2	Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R-..) of each site	**2009 Site Annual Metered Peak Demand (MW)	2009 Site Annual Metered Electric Usage (MWh) (d)	Weather Adjustment Factor (see "Weather Factor" Tab) (e)	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) (f)	Total Base Annual Usage in (MWh) adjusted for business activity and weather. (g)=(d)*(e)+ (f)	Minimum Annual Savings to meet the EO Performance Standard (MWh) (h) = (0.75%) x (g)	Planned (targeted) Annual Energy Savings in MWh no less than (h) (i)
3	DEF Company, 456 Main St., Flint, MI 48555	A-12345678910, M-456789234, R-220	2.3	12,456	0.97	-253.00	11,829	88.720	96
4						0.00	0	0.000	
5						0.00	0	0.000	
6						0.00	0	0.000	
7	Totals		2.3	12,456		-253	11,829	88.720	96

All areas shown on this page with RED letters or numbers must be completed for the corresponding years.

Insert value from "Activity Adj tab Column "j" .

* 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 > 5MW
 NOTE: 1) Site, Account and Electric Usage can be copied and pasted from the 2011 table into years 2012-2014.
 2) See "Instructions" tab for adding and deleting sites (rows).

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9 DEF Company Inc. Weather Normalized 2012 Plan Year (Minimum Performance Standard 1.0%)

10	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)	2009 Site Annual Metered Electric Usage (MWh) (d) from above	Weather Adjustment Factor (see "Weather Factor" Tab) (e) from above	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) (f)	Total Base Annual Usage in (MWh) adjusted for business activity and weather. (g)=(d)*(e)+ (f)	Minimum Annual Savings to meet the EO Performance Standard (MWh) (h) = (1.0%) x (g)	Planned (targeted) Annual Energy Savings in MWh no less than (h) (i)
11	DEF Company, 456 Main St., Flint, MI 48555	A-12345678910, M-456789234, R-220		12,456	0.97	0.00	12,082	120.823	135
12						0.00	0	0.000	
13						0.00	0	0.000	
14						0.00	0	0.000	
15	Totals		0	12,456		0	12,082	120.823	135

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DEF Company Inc. Weather Normalized 2013 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	(Blank)	2009 Site Annual Metered Electric Usage (MWh) (d) from above	Weather Adjustment Factor (see "Weather Factor" Tab) (e) from above	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) (f)	Total Base Annual Usage in (MWh) adjusted for business activity and weather. (g)=(d)*(e)+ (f)	Minimum Annual Savings to meet the EO Performance Standard (MWh) (h) = (1.0%) x (g)	Planned (targeted) Annual Energy Savings in MWh no less than (h) (i)
DEF Company, 456 Main St., Flint, MI 48555	A-12345678910, M-456789234, R-220		12,456	0.97	0.00	12,082	120.823	121
					0.00	0	0.000	
					0.00	0	0.000	
					0.00	0	0.000	
Totals			12456		0	12,082	120.823	121

DEF Company Inc. Weather Normalized 2014 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	(Blank)	2009 Site Annual Metered Electric Usage (MWh) (d) from above	Weather Adjustment Factor (see "Weather Factor" Tab) (e) from above	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) (f)	Total Base Annual Usage in (MWh) adjusted for business activity and weather. (g)=(d)*(e)+ (f)	Minimum Annual Savings to meet the EO Performance Standard (MWh) (h) = (1.0%) x (g)	Planned (targeted) Annual Energy Savings in MWh no less than (h) (i)
					0.00	0	0.000	
					0.00	0	0.000	
					0.00	0	0.000	
					0.00	0	0.000	
Totals			0		0	0	0.000	0

37 DEF Company Inc.

Weather Normalized 2015 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	(Blank)	2009 Site Annual Metered Electric Usage (MWh) (d) from above	Weather Adjustment Factor (see "Weather Factor" Tab) (e) from above	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) (f)	Total Base Annual Usage in (MWh) adjusted for business activity and weather. (g)=(d)*(e)+ (f)	Minimum Annual Savings to meet the EO Performance Standard (MWh) (h) = (1.0%) x (g)	Planned (targeted) Annual Energy Savings in MWh no less than (h) (i)
38						0.00	0	0.000	
39						0.00	0	0.000	
40						0.00	0	0.000	
41						0.00	0	0.000	
42						0.00	0	0.000	
43	Totals			0		0	0	0.000	0

Plan Outline

Customer Name: DEF Company Inc.

Directions: The plan outline should describe how the customer intends to achieve the incremental energy savings for each year of the plan. Planned 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: **October 15, 2010**

2011 Plan Outline

Total Planned Annual Energy Savings = 96.0 MWh (see detail tab)

All areas shown on this page with **RED** letters or numbers must be completed for the corresponding years.

When attachments are supplied, please sign and date them.

2012 Plan Outline

Total Planned Annual Energy Savings = 135.0 MWh (see detail tab)

2013 Plan Outline

Total Planned Annual Energy Savings = 121.0 MWh (see detail tab)

2014 Plan Outline

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

2015 Plan Outline

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

Business Activity Adjustments

Customer Name: DEF Company Inc.

Instructions:

- Show business activity adjustment increases as (+) and decreases as (-) in (j) below.
- Transfer values (j) to the "Detail Table" tab (f) for each site
- When the adjustment pertains to all sites, for site description insert the term "All Sites"
- See bottom of this sheet for examples of brief descriptions

* Detroit Edison requires electric Meter numbers, Consumers Energy requires account numbers. All require rate code. Information found on your utility bill.

2011 Plan Year (Business Activity Adjustments)

All areas shown on this page with **RED** letters or numbers must be completed for the corresponding years.

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R ..) of each site	Business Activity Adjustment (Annual MWh) (j)	Brief description of business activity adjustments:
DEF Company, 456 Main St., Flint, MI 48555	A-12345678910, M-456789234, R-220	-253	Reducing one shift of operations in May

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2012 Plan Year (Business Activity Adjustments)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R ..) of each site	Business Activity Adjustment (Annual MWh) (j)	Brief description of business activity adjustments:

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2013 Plan Year (Business Activity Adjustments)

Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R ..) of each site	Business Activity Adjustment (Annual MWh) (j)	Brief description of business activity adjustments:

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2014 Plan Year (Business Activity Adjustments)

18 Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R ..) of each site	Business Activity Adjustment (Annual MWh) (j)	Brief description of business activity adjustments:
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2015 Plan Year (Business Activity Adjustments)

25 Site Description: (Name, Service Address, for each site)	*Account (A-..) and/or Meter (M-..) Number(s) and electric rate code (R ..) of each site	Business Activity Adjustment (Annual MWh) (j)	Brief description of business activity adjustments:
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Examples of a brief description of business activity adjustments

- In 2011, operation/production is expected to decline 20% below 2009 levels (the base year) resulting in an estimated 10% reduction in energy use.
- In 2011, operation/production is expected to increase 10% above 2009 levels (the base year) resulting in an estimated 5% increase in energy use.
- A reduction of 20 MWh is anticipated in 2011 attributed to an energy savings lighting project completed in the prior year 2010.

NOTE: Reductions for energy efficiency projects installed prior to 2010 should not be included here as the reductions are in total or part included in your base metered usage.

1 **Weather Adjustment Factor**

Customer Name: DEF Company Inc.

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Instructions:

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

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

6 - Factors shown in the table below are the same for customers of Detroit Edison and Consumers Energy when correcting 2009 electric usage.

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8 **Weather adjustment factor TABLE** (Used to adjust 2009 electric usage)

Building type	Factor
Commercial Secondary	1.012
Commercial Primary	1.007
*Automotive Technology	1.038
**Industrial Primary/Secondary	1.0000

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

15 **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.

16 **2) Customer created weather adjustment factor by building type.**

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18 1. Complete the table

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Building type	Factor

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

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

27 A. Weather Adjustment Factor = (Annual Electric use in 2008 Weather adjusted to an average year)/(Electric use in 2009)

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29 B. Describe basis for determining weather adjustment.

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31 C. Provide a calculation demonstrating your methodology

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