

## Instructions for Completing the 3 YEAR AVERAGE Self Directed plan (2012)

### Dates to remember:

- This plan should be submitted and postmarked by October 15, 2011
- Utility notification of deficiencies should be mailed and postmarked by November 5, 2011
- Final Plan, with deficiencies remedied should be submitted and postmarked by November 30, 2011
- Exemption from most EO surcharges will begin January 1, 2012

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 correcting using the 3-yr average. If weather correcting using 2009 usage, please complete the application titled "Weather Normalized Self Direct Application".

### 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 2012-2013

### Step 3

- 3 Complete "Form" tab
- 4 Complete "Detail Table-3yr Ave" tab
- 5 Complete the "Plan Outline" tab
- 6 Complete "Business Activity Adjustments" tab, if applicable
- 7 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.
- 8 Row numbering can be repaired on all except the "form" tab by copying and pasting cell A2 down the sheet.
- 9 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.
- 10 **Printing** : To coordinate page numbering, use the following print options; >File, >print, > entire work book

### References:

Self Direct Plan rules can be found in the temporary order (Case U-15800) issued by the MPSC (commission) 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. It has also been proposed to allow excess savings to be carried forward up to 4 additional years. You may elect to use this option just be aware that the rules are still subject to change and you are required to comply with the rules. 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 2012

Submit completed form by October 15, 2011

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- 3 **Qualifications:** \_\_\_\_\_ 1 MW single site or, \_\_\_\_\_ 5 MW sites aggregated, # of sites aggregated \_\_\_\_\_
- 4 **Legal Name of business:** \_\_\_\_\_
- 5 **Mailing Address of Signatory:** \_\_\_\_\_
- 6 **Business phone number:** \_\_\_\_\_ **Fax number:** \_\_\_\_\_ **e-mail:** \_\_\_\_\_
- 7 **Term of the Self-directed application (2 to 5yrs):** \_\_\_\_\_ years **End-of-term renewals must be submitted by October 15 preceding the new term.**
- 8 **Date when customer will begin to or began to implement the plan at the first site: January 1, 2012**  
(coincides with exemption from energy optimization charges at all sites.)
- 9 **Basis for calculating savings:** 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 (adjusted for changes in business activity and 3-year average) (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)
2012	1.00%	0	0.0	0.0
2013	1.00%	0	0.0	0.0
2014	1.00%	0	0.0	0.0
2015	1.00%	0	0.0	0.0
2016	1.00%	0	0.0	0.0

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- 19 **Remedy of Plan Deficiency: The provider will notify the customer of any deficiency. The customer must remedy the deficiency by Nov 30, 2011**
- 20 Please work with your provider as soon as possible as often it takes several interactions to correct the deficiency.

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- 22 **Customer:**
- 23 Authorized Name (print): \_\_\_\_\_  
\*Signature: \_\_\_\_\_
- 24 Title: \_\_\_\_\_
- 25 Date: \_\_\_\_\_
- 26 e-mail: \_\_\_\_\_ fax: \_\_\_\_\_
- 27 \* This signature is an affirmation that the information provided in this plan is true and  
28 correct to the best of my knowledge.

- 29 **Additional Customer Contact (optional):**
- 30 Name: \_\_\_\_\_
- 31 Title: \_\_\_\_\_
- 32 e-mail: \_\_\_\_\_ fax: \_\_\_\_\_
- 33 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: \_\_\_\_\_

**Three (3) Year Average 2012 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	**2010 Site Annual Metered Peak Demand (MW)	2008 Site Annual Metered Electric Usage (MWh) <b>(d1)</b>	2009 Site Annual Metered Electric Usage (MWh) <b>(d2)</b>	2010 Site Annual Metered Electric Usage (MWh) <b>(d3)</b>	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) <b>(f)</b>	Total Base Annual Usage in (MWh) adjusted for business activity and weather. <b>(g) =</b> <b>(d1+d2+d3)/3+ (f)</b>	Minimum Annual Savings to meet the EO Performance Standard (MWh) <b>(h) = (1.0%) x (g)</b>	Planned (targeted) Annual Energy Savings in MWh no less than <b>(h)</b> <b>(i)</b>
						0.00	0	0.000	
						0.00	0	0.000	
						0.00	0	0.000	
						0.00	0	0.000	
<b>Totals</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.000</b>	<b>0</b>

\* 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 2012 table into years 2013-2016.

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

**Three (3) Year Average 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)	2008 Site Annual Metered Electric Usage (MWh) <b>(d1)</b>	2009 Site Annual Metered Electric Usage (MWh) <b>(d2)</b>	2010 Site Annual Metered Electric Usage (MWh) <b>(d3)</b>	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) <b>(f)</b>	Total Base Annual Usage in (MWh) adjusted for business activity and weather. <b>(g) =</b> <b>(d1+d2+d3)/3+ (f)</b>	Minimum Annual Savings to meet the EO Performance Standard (MWh) <b>(h) = (1.0%) x (g)</b>	Planned (targeted) Annual Energy Savings in MWh no less than <b>(h)</b> <b>(i)</b>
						0.00	0	0.000	
						0.00	0	0.000	
						0.00	0	0.000	
						0.00	0	0.000	
<b>Totals</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.000</b>	<b>0</b>

19 **Three (3) Year Average 2014 Plan Year (Minimum Performance Standard 1.0%)**

20	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)	2008 Site Annual Metered Electric Usage (MWh) <b>(d1)</b>	2009 Site Annual Metered Electric Usage (MWh) <b>(d2)</b>	2010 Site Annual Metered Electric Usage (MWh) <b>(d3)</b>	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) <b>(f)</b>	Total Base Annual Usage in (MWh) adjusted for business activity and weather. <b>(g) = (d1+d2+d3)/3+ (f)</b>	Minimum Annual Savings to meet the EO Performance Standard (MWh) <b>(h) = (1.0%) x (g)</b>	Planned (targeted) Annual Energy Savings in MWh no less than (h) <b>(i)</b>
21							0.00	0	0.000	
22							0.00	0	0.000	
23							0.00	0	0.000	
24							0.00	0	0.000	
25	<b>Totals</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.000</b>	<b>0</b>

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32 **Three (3) Year Average 2015 Plan Year (Minimum Performance Standard 1.0%)**

33	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)	2008 Site Annual Metered Electric Usage (MWh) <b>(d1)</b>	2009 Site Annual Metered Electric Usage (MWh) <b>(d2)</b>	2010 Site Annual Metered Electric Usage (MWh) <b>(d3)</b>	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) <b>(f)</b>	Total Base Annual Usage in (MWh) adjusted for business activity and weather. <b>(g) = (d1+d2+d3)/3+ (f)</b>	Minimum Annual Savings to meet the EO Performance Standard (MWh) <b>(h) = (1.0%) x (g)</b>	Planned (targeted) Annual Energy Savings in MWh no less than (h) <b>(i)</b>
34								0	0.000	
35								0	0.000	
36								0	0.000	
37								0	0.000	
38	<b>Totals</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.000</b>	<b>0</b>

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**Three (3) Year Average 2016 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)	2008 Site Annual Metered Electric Usage (MWh) (d1)	2009 Site Annual Metered Electric Usage (MWh) (d2)	2010 Site Annual Metered Electric Usage (MWh) (d3)	Business Activity Adjustments (MWh) Optional (see "Activity Adjustment" Tab) (f)	Total Base Annual Usage in (MWh) adjusted for business activity and weather. (g) = (d1+d2+d3)/3+ (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	0.000	
							0	0.000	
							0	0.000	
							0	0.000	
<b>Totals</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.000</b>	<b>0</b>

**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 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: \_\_\_\_\_

**2012 Plan Outline**

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

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**2013 Plan Outline**

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

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**2014 Plan Outline**

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

**2015 Plan Outline**

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

**2016 Plan Outline**

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

# Business Activity Adjustments

Customer Name: \_\_\_\_\_

**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

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

### 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)

	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)**

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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**2016 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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**Examples** of a brief description of business activity adjustments

- In 2012, operation/production is expected to decline 20% below 2010 levels (the base year) resulting in an estimated 10% reduction in energy use.
- In 2012, operation/production is expected to increase 10% above 2010 levels (the base year) resulting in an estimated 5% increase in energy use.
- A reduction of 20 MWh is anticipated in 2012 attributed to an energy savings lighting project completed in the prior year 2011.

NOTE: Reductions for energy efficiency projects installed prior to 2011 should not be included here as the reductions are in total or part included in your base metered usage.