

Filed with the Iowa Utilities Board on April 27, 2022, EEP-2018-0002

Settlement Agreement

| Program or Initiative | Clarification/Modification to EEP | Included in Board Order (Yes) or (No) | Location in Board Order | Additional Action Required by Board (Yes) or (No) | Type of Recommendation | Product Manager | Status | 2021 - 1st Qtr Update | 2021 - 2nd Qtr Update | 2021 - 3rd Qtr Update | 2021 - 4th Qtr Update |
|---|--|---------------------------------------|-------------------------|---|---------------------------------|---|------------|--|--|--|---|
| 4(D)1, Nonresidential Appliance Recycling | Eliminate program from EEP and reallocate budgeted dollars (\$54,000 per year) to the Supplemental Weatherization Program, including insulation and weatherization measures. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen and Erin Rasmussen | In Process | | | | MidAmerican allocated \$226,744, to supplemental weatherization efforts in 2021, continuing partnership with GIAC for weatherization services/kits and adding a weatherization kit to targeted low income zip codes |
| 4(D)1, Residential Equipment | Eliminate Air-Source Heat Pump measure from EEP and reallocate budgeted dollars to the Supplemental Weatherization Program, including insulation and weatherization measures. Approximately \$325,000 annually for 5 years. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Dave McCamnant and Erin Rasmussen | In Process | | | | MidAmerican allocated \$226,744, to supplemental weatherization efforts in 2021, continuing partnership with GIAC for weatherization services/kits and adding a weatherization kit to targeted low income zip codes |
| 4(D)1, Residential Low Income | Modify the EEP to use some (ICARE) dollars for weatherization services and to offer a Supplemental Weatherization Measure to provide weatherization rebates for insulation/infiltration at levels set for years 2014-2017. (50% of dollars collected above \$250k) | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Erin Rasmussen | In Process | | | | ICARE donations did not exceed \$250K in 2021 |
| 4(D)1, Residential Low Income | MidAmerican will pursue initiatives intended to result in an increase in the level of ICARE funds collected from customers and applied to supplemental weatherization each year. MidAmerican agrees to allocate 50% of all ICARE funds collection above \$250,000 to supplemental weatherization activities to be completed in MidAmerican's low income customer's homes by third-parties such as Green Iowa AmeriCorps and Habitat for Humanity. | Yes | Non-Unanimous Issues | No | Marketing and education | Stacy Christoffersen | In Process | | | | A bill message was included in December bills and social media posts ran in January and December. |
| 8(A)1,2,&3, Income Qualified Multifamily | MidAmerican will expand the eligibility requirements for participation in the Income Qualified Multifamily program to include buildings that are 10 years old or older and developed under Section 8 of the U.S. Housing Act of 1937 or Low-Income Housing Tax Credit under the Tax Reform Act of 1986, plus buildings with the Housing and Urban Development's Sectional Housing Types of Section 202 and Public Housing, and the U.S. Department of Agriculture's Section 515 Rural Rental Housing, to participate in its Low Income Multifamily program. All other affordable housing buildings not mentioned previously will be reviewed on a case-by-case basis to determine eligibility to participate in this | Yes | Unanimous Issues | No | Program Design & Implementation | Erin Rasmussen | Complete | | | | |
| 10, Municipal Benchmarking | MidAmerican agrees to work, in good faith, with municipalities on benchmarking initiatives including how individual and aggregated usage data is provided. | Yes | Unanimous Issues | No | Marketing and education | Julie Swisher | In Process | MidAmerican continues to participate in the benchmarking ordinance with the Des Moines Building Performance committee to provide business owners the requested information. | MidAmerican continues to participate in the benchmarking ordinance with the Des Moines Building Performance committee to provide business owners the requested information. | MidAmerican continues to participate in the benchmarking ordinance with the Des Moines Building Performance committee to provide business owners the requested information. | MidAmerican continues to participate in the benchmarking ordinance with the Des Moines Building Performance committee to provide business owners the requested information. |
| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | MidAmerican agrees to seek efficiencies and cost reduction opportunities in energy efficiency and demand response, including administrative costs, and agrees that all cost efficiencies and savings will be tracked and incorporated back into energy efficiency programs (not necessarily the same program) to either conduct other initiatives or to increase the amount of dollars available for incentives and services provided to customers. | Yes | Unanimous Issues | No | Program Design & Implementation | Dave McCamnant and Erin Rasmussen | In Process | MidAmerican continues to monitor spending of all programs against budget to ensure dollars are reallocated as needed. | MidAmerican continues to monitor spending of all programs against budget to ensure dollars are reallocated as needed. | MidAmerican continues to monitor spending of all programs against budget to ensure dollars are reallocated as needed. | MidAmerican continues to monitor spending of all programs against budget to ensure dollars are reallocated as needed. |
| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | MidAmerican will consider and pursue all reasonable opportunities for cost savings opportunities, including but not limited to: reductions in personnel that are charged to programs, streamlined assessment of potential and plan development costs, elimination of unnecessary or high cost promotions, and the elimination of sponsorship advertising. | Yes | | | Program Design & Implementation | Dave McCamnant and Erin Rasmussen | In Process | | | | See Exhibit H - Admin. Cost Reductions |
| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | MidAmerican agrees that administrative costs should be reduced to the maximum amount possible, and that, over the course of the five-year Plan, administrative costs shall not exceed 25% of the energy efficiency and demand response Plan budgets. | Yes | Unanimous Issues | No | Program Design & Implementation | Dave McCamnant | In Process | MidAmerican is tracking its administrative costs as a percent of budget and overall spending to meet this goal. Annual reports will include information on administrative cost reductions realized. Daily reports are made available to product managers to track ratios at the program level. | MidAmerican is tracking its administrative costs as a percent of budget and overall spending to meet this goal. Annual reports will include information on administrative cost reductions realized. Daily reports are made available to product managers to track ratios at the program level. | MidAmerican is tracking its administrative costs as a percent of budget and overall spending to meet this goal. Annual reports will include information on administrative cost reductions realized. Daily reports are made available to product managers to track ratios at the program level. | In 2021, overall administrative costs were 22.5% of total spend. |

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| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | MidAmerican agrees to collaborate with the OCA, other parties, and other utilities to better define cost categories to increase uniformity and understanding of reporting by all utilities. | Yes | Unanimous Issues | No | TRM Development | Erin Rasmussen | In Process | | | | MidAmerican proposed to dedicate a collaboration session to this topic in 2022. |
| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | MidAmerican will implement the Technical Resource Manual ("TRM") according to the approved User Guide (Vol. 1). | Yes | Unanimous Issues | No | Data Tracking and QA/QC | Erin Rasmussen | In Process | TRM has been implemented. 2021 impacts will be calculated using TRM v.5 | | | TRM has been implemented. 2022 impacts will be calculated using TRM v.6 |
| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | MidAmerican will coordinate Evaluation, Measurement, and Verification ("EM&V") and TRM efforts as possible and when appropriate to do so. | Yes | Unanimous Issues | No | Evaluation | Erin Rasmussen | In Process | EM&V collaboration is continuous and is ongoing. All Strategic and Detailed Evaluation Plans have/will be shared as well as all draft reports. Collaboration between EM&V efforts and TRM updates also continues. | EM&V collaboration is continuous and is ongoing. All Strategic and Detailed Evaluation Plans have/will be shared as well as all draft reports. Collaboration between EM&V efforts and TRM updates also continues. | EM&V collaboration is continuous and is ongoing. All Strategic and Detailed Evaluation Plans have/will be shared as well as all draft reports. Collaboration between EM&V efforts and TRM updates also continues. | EM&V collaboration is continuous and is ongoing. All Strategic and Detailed Evaluation Plans have/will be shared as well as all draft reports. Collaboration between EM&V efforts and TRM updates also continues. |
| 3, 12 & 2, Cost Reduction, Collaboration and Coordination | Starting in 2020, the parties will convene approximately three collaboration meetings each year at mutually agreeable times to discuss: low-income supplemental weatherization, pilot programs (upstream/midstream equipment programs and demand response), uniform cost definitions, and allocation of realized cost savings. EM&V collaboration will begin in 2019. | Yes | Unanimous Issues | No | Collaboration Meetings | Erin Rasmussen | In Process | The 3rd Midstream will take place in early Q2 2021; Other collaboratives that are planned are: Fuel switching/non-wires alternatives (Aug 2021); Smart stat/load management (Oct 2021); Uniform cost definitions (early 2022) | The 1st collaboration for 2021 was held on April 9, 2021. The topic was the final Midstream presentation showing results of the collaboration/study effort. | The 2nd collaboration for 2021 was held on August 25, 2021. The topic was fuel switching implications for customers moving from natural gas HVAC system to ASHP. This collaboration was followed up with an heat pump educational webinar on December 6, 2021. | The 3rd collaboration for 2021 was held on December 10, 2021. The topic was smart thermostat demand response programs. |
| Evaluation, Measurement and Verification | MidAmerican agrees to incorporate and complete EM&V according to Application Exhibit 8 included in its Plan. | Yes | Referenced Throughout Order | No | Evaluation | Erin Rasmussen | In Process | MidAmerican is on track to meet the EM&V completion goals according to Application Exhibit 8. | MidAmerican is on track to meet the EM&V completion goals according to Application Exhibit 8. | MidAmerican is on track to meet the EM&V completion goals according to Application Exhibit 8. | Due to constraints getting data from smart thermostat manufacturers and curtailment customers, the SummerSaver and Curtailment reports were delayed until Q1 2022. All other reports were completed in 2021. |
| Evaluation, Measurement and Verification | EM&V for new programs and measures (e.g., advanced thermostats and Home Energy Reports) will be completed as early as possible when appropriate levels of data are available for the EM&V process. | Yes | Referenced Throughout Order | No | Evaluation | Erin Rasmussen | In Process | Evaluation work is underway for Residential Low Income and Residential Behavioral programs | Evaluation work is underway for Residential Low Income, Residential Behavioral, IQMF, Appliance Recycling, Education, and Nonresidential Energy Solutions programs | Evaluation work is underway for IQMF, Appliance Recycling, Education, Nonresidential Energy Solutions, SummerSaver and Curtailment programs. Final reports for Residential Low Income and Residential Behavioral were released in July 2021. | Evaluation work is underway for SummerSaver and Curtailment programs; final reports to be completed in Q1 2022. Final reports for IQMF, Appliance Recycling, Education, Nonresidential Energy Solutions were released in November and December 2021. |
| 9(B), Annual Reporting | MidAmerican's annual reports will include a narrative explanation of program performance, and updates on pilots and research and development projects. | Yes | Unanimous Issues | Yes | Reporting | Erin Rasmussen | In Process | Included | | | |
| 9(B), Annual Reporting | MidAmerican will include an affidavit with its annual report, but will retain flexibility in determining what is included in the annual report and in what detail, while striving for transparency in its reporting. | Yes | Unanimous Issues | No | Reporting | Erin Rasmussen | In Process | Included | | | |
| 9(B), Annual Reporting | The parties agree that the current January 30 annual filing of new program changes for the current year is useful and reasonable; therefore, MidAmerican will continue to make this filing. | Yes | Unanimous Issues | Yes | Reporting | Erin Rasmussen | In Process | Completed | | | |
| 8(B), Appliance Recycling | MidAmerican will continue to conduct cross-promotional activities during the scheduling and pick-up of appliances. This may include the use of emails and leave behind information related to other available programs. | Yes | Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen | In Process | Exploring updating online scheduling tool confirmation screen to direct customers to additional rebate programs. | | | Email confirmation includes cross promotion and provides link to MidAmerican website. |
| 8(B), Appliance Recycling | MidAmerican will allow master-metered multifamily complexes to participate in the residential program since appliances are coming from the individual units. | Yes | Unanimous Issues | No | Program Design & Implementation | Erin Rasmussen | Complete | | | | |
| 11, Upstream Retail Lighting | MidAmerican will not continue the upstream retail lighting program. The market for LED lighting has significantly matured in recent years and the rate of free-ridership is likely to be high and increase going forward. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Erin Rasmussen | Complete | | | | |
| 4(F), Additional Upstream/Midstream programs | MidAmerican will participate in collaboration to design upstream/midstream programs for lighting and/or other technologies. | Yes | Non-Unanimous Issues | Yes | Reporting | Erin Rasmussen | In Process | The 3rd Midstream collaborative is anticipated to be held in early Q2 2021 | Final Midstream collaboration held on April 9, 2021. | IOU's continue work on pilot program design. | IOU's continue work on pilot program design. Request for proposals are anticipated to be released in Q1 2022. |
| 13, Trade Ally Portal | MidAmerican will continue to provide a dedicated portal for TAs; however, it may no longer be separated from MidAmerican's own website pages. | Yes | Unanimous Issues | No | Trade Ally Outreach | Stacy Christoffersen | In Process | MidAmerican continues to provide a separate portal dedicated to Trade Allies. | MidAmerican continues to provide a separate portal dedicated to Trade Allies. | MidAmerican continues to provide a separate portal dedicated to Trade Allies. | MidAmerican continues to provide a separate portal dedicated to Trade Allies. |

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| 13, Trade Ally Portal | MidAmerican will not require that all TAs be a TA Partner or require interactions with the TA portal on a regular basis. Ambassadors are a vital communication tool for TAs and will continue to educate TAs about where to find information on the portal and MidAmerican's website. | Yes | Unanimous Issues | No | Trade Ally Outreach | Stacy Christoffersen | In Process | MidAmerican's Trade Ally Ambassadors continue to provide outreach and support to all trade allies, which includes a dedicated help line. In addition, information specific to Trade Allies is provided on MidAmerican's website through the Trade Ally Central SharePoint site. | MidAmerican's Trade Ally Ambassadors continue to provide outreach and support to all trade allies, which includes a dedicated help line. In addition, information specific to Trade Allies is provided on MidAmerican's website through the Trade Ally Central SharePoint site. | MidAmerican's Trade Ally Ambassadors continue to provide outreach and support to all trade allies, which includes a dedicated help line. In addition, information specific to Trade Allies is provided on MidAmerican's website through the Trade Ally Central SharePoint site. | MidAmerican's Trade Ally Ambassadors continue to provide outreach and support to all trade allies, which includes a dedicated help line. In addition, information specific to Trade Allies is provided on MidAmerican's website through the Trade Ally Central SharePoint site. |
| 4(A) 1&2, Residential Equipment | Although MidAmerican feels air-source heat pumps ("ASHP") are a cost-effective measure and sound technology, MidAmerican agrees that further analysis is warranted and therefore agrees to eliminate (at this time) the residential ASHP measure until this analysis has been completed and the TRM has fully addressed the fuel-switching issue, and may reinstate the measure if it is consistent with the goals of the Plan. | Yes | Unanimous Issues | No | Program Design & Implementation | Dave McCamnant | Complete | | | | |
| 4(A) 1&2, Residential Equipment | MidAmerican will include ASHP in its planned HVAC study to gain more insight from TAs about the use of this technology in Iowa, functionality in cold climates, and costs. | Yes | Unanimous Issues | No | Market Research | Erin Rasmussen and Dave McCamnant | Complete | | | | |
| 4(A) 1&2, Residential Equipment | If ASHP is reintroduced during the Plan cycle, funding from administrative cost reductions or underutilized programs will be used in order to maintain overall budgets and low income funding. | Yes | Unanimous Issues | No | Program Design & Implementation | Team | Complete | | | | |
| 4(A) 1&2, Residential Equipment | MidAmerican will add additional fields to its application to have both the customer and installing TAs certify the new home complies with appropriate building/energy codes. | Yes | Unanimous Issues | No | Program Design & Implementation | Dave McCamnant and Stacy Christoffersen | Complete | | | | |
| 4(B), Residential Assessment | MidAmerican will not continue to offer in-home assessments. However, MidAmerican will support residential customers' adoption of energy efficiency through its energy efficiency call center, through outreach to customers participating in the online assessment, and through educational materials. MidAmerican will provide interested customers a list of contractors that are able to provide in-home assessments for a fee. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen | In Process | The energy efficiency call center continued to assist customers with the online assessment. In February 2021, the online assessment/kit program was promoted in both the emailed residential newsletter and the mailed paper residential newsletter. The program saw over 8,900 completions in February. | The energy efficiency call center continued to assist customers with the online assessment. The online assessment/kit program was promoted in social media and newsletters. | The energy efficiency call center continued to assist customers with the online assessment. The online assessment/kit program was promoted in social media and newsletters. | The energy efficiency call center assisted 156 customers with the online assessment in 2021. There were over 36,500 online assessment completions in 2021. The online assessment/kit program was promoted in social media and newsletters. |
| 4(B), Residential Assessment | MidAmerican will use similar eligibility guidelines for kits as it did for onsite assessments; however, should customers request additional parts of a kit due to failure, damage, new features, etc., MidAmerican will provide them to the requesting customer. | Yes | Non-Unanimous Issues | No | Evaluation | Stacy Christoffersen | Complete | | | | |
| 4(B), Residential Assessment | MidAmerican will use the TRM for determining savings as indicated for kits; but will conduct a follow-up survey and billing analysis after installation and during EM&V to validate or inform TRM assumptions. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen | Complete | MidAmerican is using the TRM to calculate kit savings and includes a survey with every kit. The Residential Assessment EM&V report was released in December 2020 and the survey data has been shared with the TRM committee for updates to version 6. | TRM version 6 includes data from the Residential Assessment EM&V report and in-service rates were adjusted. | | |
| 4(B), Residential Assessment | At the present time, there is no integration or link between the online assessment tool and EEMIS which allows for MidAmerican to identify what measures were recommended during the online assessment and which measures were installed and rebated after completion. MidAmerican has issued a Request for Proposal ("RFP") to integrate the calculation of conversion rates for rebated measures for customers that actually sign-in to the online tool through their MidAmerican bill account and not as a guest user provided that the integration can be done at a reasonable cost. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen | In Process | Conversion rates will be reported in Q4 of each year. | Conversion rates will be reported in Q4 of each year. | Conversion rates will be reported in Q4 of each year. | 1,616 residential equipment projects were completed in 2021 by customers that completed the online home energy assessment |

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| 4(B), Residential Assessment | The RFP further indicates that the contractor will need to provide information about the recommendations provided to customers to assist MidAmerican with conducting follow-up and promotional activities with customers for measures recommended during the online assessment. MidAmerican understands the importance of ensuring the online assessment tool provides similar information to customers as the advisors did when conducting an onsite assessment and helps to engage customers in taking steps to act on the recommendations. Through the RFP processes, MidAmerican expects to find a tool that is customer-friendly, provides personalized recommendations, helps customers to get started on recommendations, tracks their progress, and allows MidAmerican to conduct follow-up and promotional activities on a regular basis. | Yes | Non-Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen | In Process | In 2021, MidAmerican will embed the Oracle tool into its website so that the customer can more easily access the information (including tips) each time they log in to their My Account page. This is expected to be completed in Q2 2021. | The new web experience was launched in May 2021 | An email and direct mail postcard were sent in September 2021 to customers who received kits providing more information on advanced power strips and encouraged continual engagement with the HomeCheck Online tool and tips. | As a result of continued promotion and an enhanced web experience, the program saw a 78 percent increase in participation over 2020. |
| 6(A)1, Nonresidential Equipment | MidAmerican will continue to use its annual review process and revisions to the TRM to determine what changes may be necessary for the next year of the Plan. Each year, MidAmerican reviews current measures to identify changes and custom projects to determine if new prescriptive measures are warranted. MidAmerican review can include all measures deemed cost-effective and emerging technologies for inclusion in future Plan years. | Yes | Unanimous Issues | No | Program Design & Implementation | Dave McCamant | In Process | MidAmerican continues to participate in the Technical Reference Manual Oversight committee and Technical Advisory Committee. MidAmerican continues to collaborate with the Advisory Committee to investigate changes that may be necessary. | MidAmerican continues to participate in the Technical Reference Manual Oversight committee and Technical Advisory Committee. MidAmerican continues to collaborate with the Advisory Committee to investigate changes that may be necessary. | MidAmerican continues to participate in the Technical Reference Manual Oversight committee and Technical Advisory Committee. MidAmerican continues to collaborate with the Advisory Committee to investigate changes that may be necessary. | MidAmerican continues to participate in the Technical Reference Manual Oversight committee and Technical Advisory Committee. MidAmerican continues to collaborate with the Advisory Committee to investigate changes that may be necessary. |
| 6(C)Commercial New Construction | MidAmerican plans to provide a high level of natural gas modeling with all projects where natural gas is incorporated into the project. However, MidAmerican will not provide design assistance fees or incentives for natural gas measures included in new construction. New buildings will be required to meet relevant code. | Yes | Unanimous Issues | No | Program Design & Implementation | Dave McCamant | In Process | | | | A total of 67 customers were assisted with gas modeling in 2021. |
| 14, Key Account Manager Recognition Program | MidAmerican will continue its non-incentive KAM recognition program during the Plan which includes all Key Account personnel—KAMs and Business Account Managers. | Yes | Unanimous Issues | No | Marketing and education | Julie Swisher | In Process | MidAmerican will continue presenting the KAM award, during the first quarter of each year, to the Key Account leadership team. | MidAmerican will continue presenting the KAM award, during the first quarter of each year, to the Key Account leadership team. | MidAmerican will continue presenting the KAM award, during the first quarter of each year, to the Key Account leadership team. | MidAmerican will continue presenting the KAM award, during the first quarter of each year, to the Key Account leadership team. |
| 6, Program Cost Caps | MidAmerican agrees to distribute any remaining funding within each year of the Plan, subject to the following protocol: <input type="checkbox"/> MidAmerican will move any remaining funds among programs to cover demands within customer class and fuel type; then <input type="checkbox"/> MidAmerican will review and fund any projects that were pre-approved in a Plan year, but have been denied based on program funding limits; then <input type="checkbox"/> MidAmerican will make available any remaining funding to capped projects that were preapproved and received incentives that would otherwise have been larger but for the project or customer caps while maintaining all other caps and/or eligibility requirements. | Yes | Unanimous Issues | No | Caps | Erin Rasmussen | In Process | | | | Being followed throughout each year. |
| 6, Program Cost Caps | MidAmerican agrees to process completed applications and preapprovals within four weeks assuming all supporting documentation is provided at the time of submittal. | Yes | Unanimous Issues | No | Rebate Processing | Julie Swisher | In Process | 2021 Key Performance Indicator - process 92 percent of rebate applications within two weeks. In Q1 2021, MidAmerican processed 96 percent of rebate applications within two weeks. For those projects that were not processed in two weeks, MidAmerican will investigate to determine if any process and procedures can be put in place to increase the percentage of projects completed in two weeks. | 2021 Key Performance Indicator - process 92 percent of rebate applications within two weeks. In Q2 2021, MidAmerican processed 96 percent of rebate applications within two weeks. For those projects that were not processed in two weeks, MidAmerican will investigate to determine if any process and procedures can be put in place to increase the percentage of projects completed in two weeks. | 2021 Key Performance Indicator - process 92 percent of rebate applications within two weeks. In Q3 2021, MidAmerican processed 96 percent of rebate applications within two weeks. For those projects that were not processed in two weeks, MidAmerican will investigate to determine if any process and procedures can be put in place to increase the percentage of projects completed in two weeks. | 2021 Key Performance Indicator - process 92 percent of rebate applications within two weeks. In Q4 2021, MidAmerican processed 96 percent of rebate applications within two weeks. For those projects that were not processed in two weeks, MidAmerican will investigate to determine if any process and procedures can be put in place to increase the percentage of projects completed in two weeks. |
| 6, Program Cost Caps | MidAmerican will facilitate POET's participation in the TRM so that it can present its recommendation to use energy intensity to evaluate savings from energy efficiency improvements. | Yes | Unanimous Issues | No | TRM Participation | Erin Rasmussen | Complete | | | | |

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| 4(C), Behavioral Program Frequency | MidAmerican reduced the frequency of home energy reports to reach the same number of customers with fewer home energy reports. Additionally, MidAmerican reduced the frequency of reports as part of its persistence case study and will generate a white paper detailing the results. MidAmerican is currently in its second year of this persistence case study and anticipates it may continue for two additional years during the Plan. | Yes | Unanimous Issues | No | Reporting | Stacy Christoffersen | Complete | The persistence case study will be included in the Residential Behavioral EM&V which is currently underway. | The persistence case study will be included in the Residential Behavioral EM&V which is currently underway. | The persistence case study is included in the Residential Behavioral EM&V report released in July 2021. | |
| 4(C), Behavioral Program Frequency | MidAmerican has received proposals from vendors for its Behavioral program included in its Plan and no proposals indicated that home energy reports can be provided at \$1.00 or less. MidAmerican will reevaluate the program design once the persistence case study ends. | Yes | Unanimous Issues | No | Program Design & Implementation | Stacy Christoffersen | Complete | | | | |
| Communication with OCA and Board | MidAmerican, in recognition of a Board order directed at IPL requiring them to file any change of status for its programs that result from budget constraints, will communicate regularly with the OCA and the Board when programs hit 50%, 75% and 85% or greater of budget about what actions may occur. | No | N/A | No | Additional Voluntary Action | Dave McCamant and Team | In Process | | On May 6, 2021 MidAmerican sent notification to trade allies that Natural Gas - Residential Equipment had utilized 50% of its budget. On June 1, 2021 MidAmerican sent notification to trade allies that Natural Gas - Residential Equipment had utilized 65% of its budget. On June 28, 2021 MidAmerican sent notification to trade allies that Natural Gas - Residential Equipment had utilized 75% of its budget. | On July 12, 2021 MidAmerican sent notification to trade allies that Natural Gas - Residential Equipment had utilized 80% of its budget. On September 14, 2021 MidAmerican sent notification to trade allies that Natural Gas - Residential Equipment had utilized 90% of its budget. | Natural Gas - Residential Equipment finished 2021 at 138% of budget. No further notifications were sent to trade allies in 4th quarter. MidAmerican reallocated funds from other residential natural gas programs that were underspent in order continue paying customer rebates through the end of the year. Total spending for residential natural gas programs ended 2021 at 98% of budget. |