

CUB CITIZENS UTILITY BOARD

2022 Stakeholder Engagement and Impact Report

Collaboration

Policy
Advocacy

Equity &
Affordability

Mentoring

CUB
Tracks

Partnerships

Energy
Education



LETTER FROM THE EXECUTIVE DIRECTOR

On behalf of the board of directors, staff, and our members I am proud to share CUB's first stakeholder engagement and impact report.

CUB has been Wisconsin's consumer advocate for residential, farm and small business customers since the late 1970s. **Our work has helped save Wisconsinites billions of dollars on utility bills.**

Two years ago, CUB saw significant change with the passage of a state law that provides a penny or so of funding from customers' monthly electric or natural gas bills to support stronger advocacy for Wisconsin citizens and small businesses.

The legislation reinforced CUB's role as an independent nonpartisan and nonprofit organization and underscored our role as the **utility consumer advocate for millions of Wisconsin households and hundreds of thousands of small businesses**, be they Main Street stores in small towns or small mom-and-pop manufacturers.

With the advent of this publication, we will illustrate how we're evolving the reach of our advocacy. That includes, of course, dollars and cents: **Our regulatory efforts saved customers nearly \$40 million in 2022 alone, and more than \$500 million over the past five years.**

CUB's impact extends beyond the bottom line. Our team of experts is working for more than savings. **We're working for cost-effective policies that provide fair outcomes for residential and small business customers and programs to help those struggling the most pay their utility bills.**

Beyond that:

- We have **expanded our outreach and education** efforts through webinars and [our CUB Tracks podcast](#).
- **CUB is actively involved in policy collaboration**, in state, regional and national forums.
- Our talented **experts are called upon to do training** in Wisconsin and around the country.
- We've **launched mentoring programs** to inspire a new generation of consumer advocates to stand up for fairness, affordability, and a customer-centric energy future for years to come.

Though we have evolved, CUB's core mission remains fighting for strong regulatory outcomes for customers, educating Wisconsinites about ways to save on their energy bills, and encouraging participation in the decisions being made about our energy future.

Please reach out with your feedback about our new report!



Tom Content



CUB 2022 TEAM



Tom Content
Executive Director



Corey Singletary
Director, Regulatory Affairs



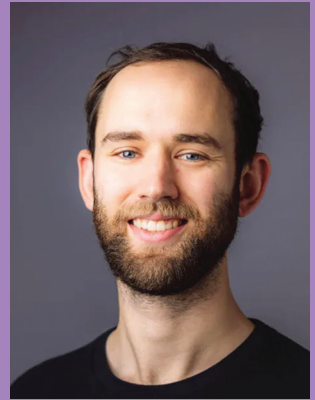
Richard Storck
Director, Outreach & Engagement



Cara Coburn Faris
General Counsel



Steve Kihm
Regulatory Strategist



Ted Callon
Public Utility Analyst



*Your Independent
Consumer Voice*

*Advocating for Fairness and
an Affordable Energy Future*

**"Let's build an
energy future
for people,
not profit."**

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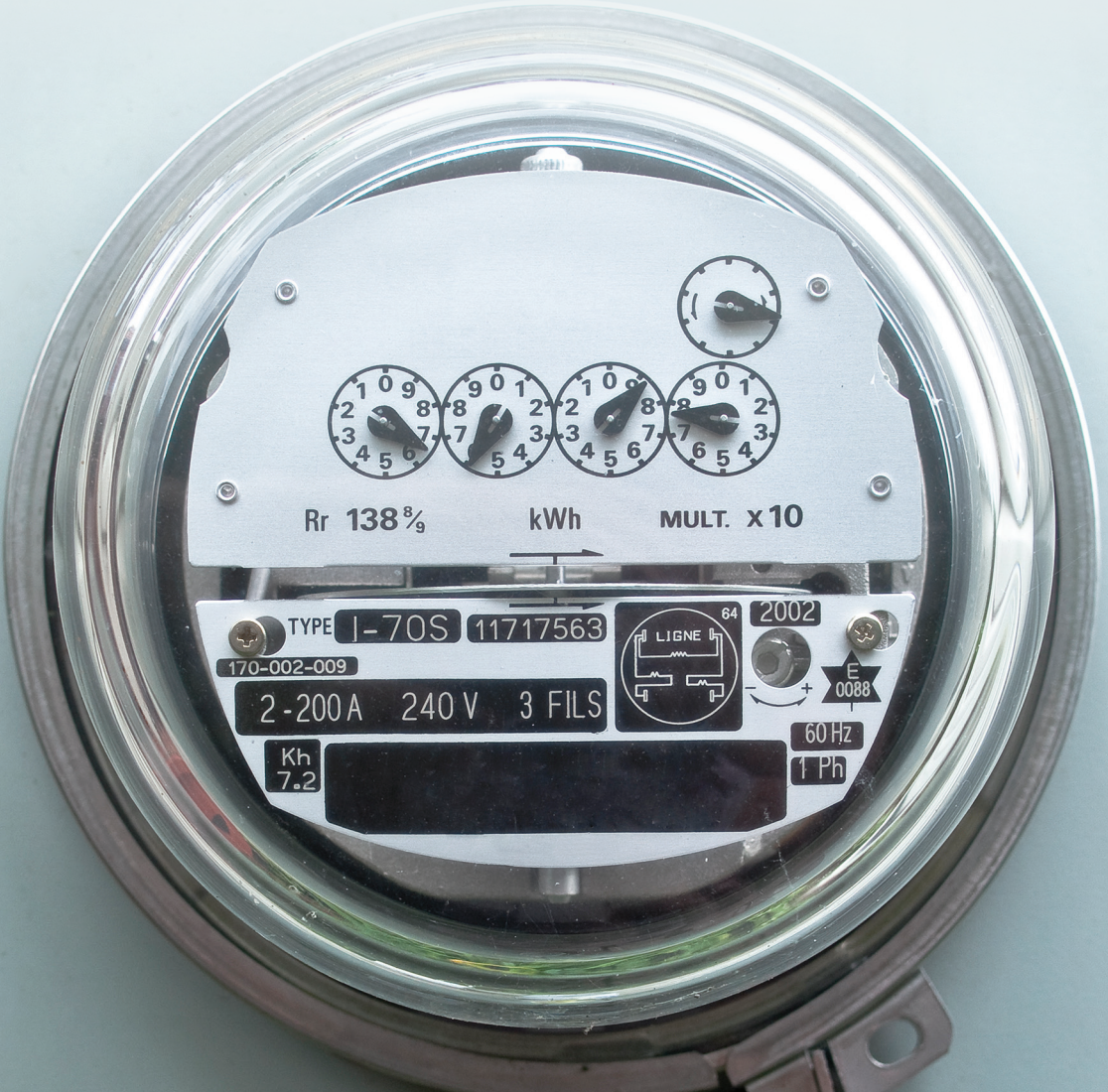
WHY AN IMPACT REPORT?

Wisconsin's utilities are powerful ... flush with vast financial resources, well connected politically, and blessed with captive customers to continually fill their coffers.

CUB was created to counter the utilities' quest for higher and higher rates, ensure effective service, and educate consumers about energy costs and how they can have a voice in the decisions being made about Wisconsin's energy future.

For the last 43 years CUB has successfully challenged the utilities in rate cases before the PSC to the tune of **\$3.8 billion in savings since 2006**. And we stand up for policies that promote fairness in how utility customers are treated, whether they are living on a fixed income or generating their own power with solar panels.

The purpose of this impact report is to share with our members and stakeholders the different ways our actions are benefiting Wisconsin citizens and small businesses.



CUB is an independent, nonpartisan member-supported nonprofit organization whose purpose is to:

1. Provide public interest legal services to ensure effective and democratic representation of residential and small business utility customers before regulatory agencies, the legislature, and the courts.

Customers need to know that there's more than the utilities' perspective on how the energy transition takes shape, and that their voice needs to be heard.

2. Advocate for reliable, affordable and sound utility service.

Customers should be confident that Wisconsin utilities are planning out an energy future that keeps the lights on, doesn't cost too much and provides pathways for customers to invest in solar panels and battery storage systems in ways that benefit themselves as well as their neighbors.

Customers whose energy burden is so great that they wonder how they'll make it through another month need tools and methods to help bring their bills down along with bill payment plans that make sense.

3. Educate consumers on matters relating to utility regulation and energy policy.

CUB launched a series of webinars and the CUB Tracks podcast to show customers ways to save money, particularly in a period of rising costs for natural gas, coal and other sources of energy.

CUB is stepping up its partnerships, dialogues and collaborations with a variety of stakeholder groups, each with varying ideas on how the energy future should unfold. Customers need to know they're represented in the meetings and rooms where decisions are made.

With this report we hope to encourage more people to become involved and join CUB, support our work, and demand fair treatment by calling on regulators and legislators to watch out for them and not just the utilities.

Good outcomes and an energy future built for what customers want can happen if more people participate! That's the key to enabling real change.





Membership

We represent 1,200 residential members and 22 small businesses, and we advocate for more than **4.5 million households and small businesses across the state**. Due to our efforts in 2022, CUB helped save Wisconsin ratepayers \$39.8 million, and nearly \$300 million since 2020.



Advocacy &
Representation

CUB's core work is **advocacy** for fairness, affordability, and sound regulation of Wisconsin utility companies. CUB's work in cases at the PSC sought to:

- * Bring down **excessive utility profits** and demonstrate how utilities' justification for those high profits has been flawed in a way that has enabled profits to remain far too high for too long.
- * Advocate for fairness for customers when **coal plants are shutting down**. CUB's experts showed there is no reason for utilities to reap profits for a decade or more, long after that plant's power is needed to keep the lights on.
- * Collaborate to develop new policy ideas to help customers struggling the most with high energy costs. This included dialogue with **Walnut Way Conservation Corp.** of Milwaukee, an intervenor in the We Energies rate case that actively advocated on behalf of low-income customers from Milwaukee's Lindsay Heights neighborhood.
- * Advocate for bolder utility regulation that would reward utilities for improved performance in areas such as customer affordability, reliability, customer service and energy efficiency. **The PSC is considering a new model** that would provide utilities with profit incentives when they do right by customers and penalties when they don't.





*Regulatory
Team at Work*

At the PSC in 2022, CUB advocated in rate cases, policy cases and construction cases on behalf of the residential and small business customers of Wisconsin.

CUB staff experts Corey Singletary and Dr. Steve Kihm prepared 58 pieces of testimony in a variety of cases, and CUB General Counsel Cara Coburn Faris wrote 27 legal briefs advocating for residential and small business customers of Wisconsin.

The cases ran the gamut from utility rate cases for investor-owned utilities, the Shawano municipal utility rate case, construction cases including the proposal to expand natural gas generation at the WPS power plant near Wausau, and policy cases involving customer generation of solar power.

CUB also raised concerns about the rising cost of the [Cardinal-Hickory Creek](#) power line and called for a halt to the construction of this project until it can be determined that the line will be able to cross into Iowa over the Mississippi River.

Beyond the PSC, CUB joined with consumer advocates in the Midwest to support [competitive bidding on transmission lines](#) in comments submitted to the Federal Energy Regulatory Commission. General Counsel Cara Coburn Faris also advocated for [CUB as we joined the Wisconsin Industrial Energy Group to advocate for customer savings](#) in another FERC case. At issue: how much utility customers are on the hook for unreasonably high costs solely to benefit shareholders of the transmission utility ITC.



CUB IN ACTION

Our reach extends beyond **advocacy and representation** and includes **collaboration and dialogue** with other regulators and consumer advocates around the country; **training** for utility and PSC employees; **mentoring** a new generation of advocates; and **outreach, education, and media interviews** so Wisconsin citizens can stay up to date and participate more in the decisions influencing their energy future.



HIGHLIGHTS FROM 2022:



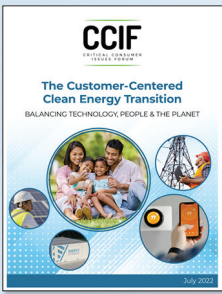
IALOGUE ACROSS THE USA: CUB participates in national policy dialogues on energy and utility policy through its membership in the [National Association of State Utility Consumer Advocates \(NASUCA\)](#).

CUB became the only nonprofit consumer advocate in the country serving on the NASUCA executive committee.

In November 2022, four CUB staffers attended the national conference of NASUCA and the [National Association of Regulatory Utility Commissioners \(NARUC\)](#). Executive Director Tom Content and Regulatory Affairs Director Corey Singletary represented CUB and NASUCA, sharing the consumer advocate perspective during two NARUC policy sessions, each attended by more than 150 people. Corey discussed water utilities, affordability, and the need to rein in high utility profits. Tom defended preserving state laws that, with billions of dollars at stake, permit competitive bidding for future major transmission line projects.



Dr. Steve Kihm, CUB's expert on utility finance and economics, joined the Federal Reserve Bank of Philadelphia's panel of economists who help the bank publish the [Survey of Professional Forecasters](#). In that role he submits macroeconomic forecasts quarterly to the bank, which then summarizes the forecasts and publishes the data.



COLLABORATION: Corey participated in the [Critical Consumer Issues Forum \(CCIF\)](#), which brings consumer advocates, state regulators, and utilities together to find consensus on current issues. In 2022, that dialogue led to the publication of the report "The Customer-Centered Clean Energy Transition: Balancing Technology, People and the Planet."

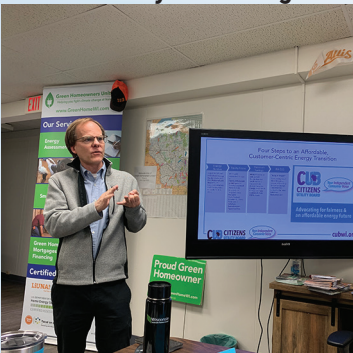
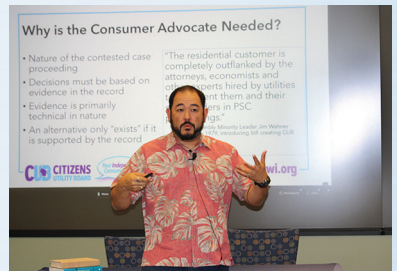
In Wisconsin, Corey co-chaired a PSC advisory committee to **recommend updated rules for interconnecting rooftop solar, energy storage, and other customer-sited renewable energy resources.** CUB debated policy with fellow members of the [Customers First Coalition](#) and developed ideas for [Wisconsin Public Utility Institute](#) policy workshops to train utility, state government, and stakeholder employees. Tom represented CUB on the state of [Wisconsin's Low Income Energy Advisory Committee.](#)

CUB TEAM RECOGNIZED

Richard Storck, CUB's director of outreach and engagement, received the 50th Anniversary [Backyard Hero Award](#) from [Community Shares of Wisconsin](#) for being an exceptional volunteer on the Community Shares board of directors. CUB participated in [The Big Share](#), an annual day of giving held each March to support nonprofit organizations working for social change. CUB's The Big Share video by Corey was honored with The Big Share's Creative Video Prize.



TRAINING: CUB experts are in demand by consumer advocates around the country, regulators, commission staff, and utility employees. In 2022, Corey and Steve led NASUCA webinars. Corey and Steve also provided in-person training in multiple forums, including the [Energy Utility Basics](#) class hosted by the Wisconsin Public Utility Institute and training sessions for Wisconsin Public Service Commission staffers. Steve also taught at the Michigan State University [Institute for Public Utilities](#), something he's been doing since 2005. Steve also gave a presentation at the Society of Utility and Regulatory Financial Analysts meeting in Virginia.



INNOVATIVE TRAINING AND EDUCATION: CUB and two small business members ([Green Homeowners United](#) and [Evolution Marketing](#)) hosted a resilience training workshop for the PSC and other state agencies to showcase innovative actions and technologies for Wisconsin homeowners and families, particularly those facing high energy burdens. **The workshop brought together early adopters of energy efficiency technologies to share business experience and lessons for state employees who will develop new rebate programs with Inflation Reduction Act funds.**

EDUCATION: CUB hosted six webinars for residential and small business customers on topics ranging from the clean energy transition to consumer- and small business-focused ways to save energy.

CUB partnered with several nonprofit and governmental entities and several Wisconsin based businesses (Bounce Milwaukee, EnTech Solutions, Green Homeowners

United, Wasmer Co.). Together with our partners listed above, CUB curated six educational webinars – three targeted to residential customers and three for small businesses – with more than 350 views to date. See them at <https://www.youtube.com/@cubwi>



OUTREACH: CUB led Utility Bill Clinics and energy policy talks at the 31st Annual Energy Fair organized by the Midwest Renewable Energy Association. We also attended the Renew Wisconsin annual Energy Summit and the annual Wisconsin Sustainable Business Conference.

INFORMING WISCONSIN: Via the CUB Tracks Podcast, CUB Blog, and email newsletter, CUB worked to inform and educate Wisconsinites and to stimulate more participation in the big decisions being made by state regulators.

All told, CUB shared 22 podcasts, six webinars as well as other videos on its YouTube channel, and CUB appeared in over 100 articles by publications and news outlets in Wisconsin, the Midwest, and beyond.



PARTICIPATION: For the We Energies and WPS rate cases, CUB expanded its outreach to encourage CUB members and the broader public to have their say and offer input to the PSC. The end result: hundreds attended in-person hearings and more than 1,700 people submitted a comment in one form or another – whether via Zoom, in person, or online via the PSC website.

CUB boosted awareness of the public hearings for the controversial case through media outreach. All told, nine different television stations in Milwaukee and Green Bay and two public radio outlets reported on the high-profile rate cases.



IT'S TIME TO VOTE FOR MEMBERS OF THE CUB BOARD OF DIRECTORS

Current CUB members in good standing are entitled to vote in this election. You are eligible if you've made a contribution to CUB of at least \$5 on or after January 1, 2022. The candidates include Eileen Hannigan, John Hendrick, Carol Stemrich and Andrew Hartinger, who are seeking re-election to three-year terms on the board. Frank Greb and Montré Moore also appear on the ballot, to fill board vacancies for terms ending in 2025 and 2024, respectively.

**Please use the ballot envelope enclosed with this annual report to cast your vote.
Please mail your ballot by June 15, 2023.**

JOEL DRESANG, a CUB board member since 2017, did not seek re-election. We thank Joel for his counsel and wisdom to CUB's board and staff over the past six years and his enthusiastic support for CUB's outreach, communications, and his personal interaction with CUB members. CUB also extends its warm appreciation to **HEATHER GOETSCH**, a CUB board member for the past two years. Heather and Joel were active on CUB's outreach and engagement committee, and Heather served as moderator during CUB educational webinars for utility customers in 2022.



FRANK GREB

Frank Greb of **Madison** joined the CUB Board in December 2022. He recently retired as President and CEO of Slipstream, which was created by the merger of Seventhwave and Wisconsin Energy Conservation Corp. He helped lead the growth of the organization to one of the top tier energy efficiency and sustainability focused nonprofit organizations in the country. Frank previously worked at Alliant Energy Corp., where he led the expansion of a team that built renewable energy projects across the country. Before that, also at Alliant, he was responsible for the design and

implementation of energy efficiency programs, which provided him first-hand experience working with the Public Service Commission of Wisconsin. Frank also serves on the board of the Wisconsin Public Utility Institute. Frank is a longtime supporter of CUB's mission. He seeks to help CUB drive further change in the industry that benefits people who cannot possibly be successful on their own. In Frank's view, **CUB needs to be a champion for change and make things better for those that are not well represented or funded.**



EILEEN HANNIGAN

Eileen is vice president of talent and tech development with Illume Advising in Madison. She brings many years of experience with energy efficiency programs including program planning, cost-benefit analysis, implementation, and evaluation. Her experience provides a good foundation for understanding and assessing the issues around utility rate cases and infrastructure investments in general, and especially where energy efficiency is a viable alternative. Eileen values CUB's mission of providing a voice for residential ratepayers. Adequate representation of all stakeholders

is crucial to ensuring Wisconsin has utility service that is reliable, affordable, and sound. In addition, **she believes that communities throughout Wisconsin benefit from CUB's work which helps strengthen local economies by protecting ratepayers from unnecessary rate increases.** She is also interested in ensuring the role of energy and water efficiency as an alternative to capital improvements, where appropriate and cost-effective. Eileen was elected to the board in 2014 and has served as CUB's president since 2017.



ANDREW HARTINGER

Andrew Hartinger of Wauwatosa is chief financial officer at Innovative Motion Technologies and Raffel Systems, both based in Germantown. He has served in a variety of finance and accounting and auditing roles, as a corporate controller, audit manager, among others - and has both a bachelor's and master's degree in accounting from University of Wisconsin-Milwaukee. **Andrew believes in CUB's mission to advocate for consumers for fair prices from utility companies, and that Wisconsin needs CUB as a voice to represent consumers because of the**

utilities' status as a regulated monopoly. Andrew has used his skills in the areas of finance, internal controls, and financial reporting to help CUB in budgeting, financial planning and controls to ensure CUB can sustain consistent operations and maximize its funding to further its mission. Andrew has served as CUB's treasurer since 2020.



JOHN HENDRICK

John is a retired public interest attorney in the areas of labor law, cooperatives, family law and elder law. He served as director of the Elder Financial Empowerment Project at Coalition of Wisconsin Aging and Health Groups, where he provided support to and advocacy for elder victims of financial abuse. For 24 years, he served **Dane County** as county supervisor and board chair. John had long admired the work of CUB and supported its mission. Elected to the CUB board in 2014, **he has focused on CUB's sustainability and resilience as Wisconsin faces an uncertain**

and evolving energy future. John has served as CUB's vice president since 2017.



MONTRÉ MOORE

Montré J. Moore of **Milwaukee** is a public involvement and outreach specialist with the Southeast Wisconsin Regional Planning Commission, based in Waukesha. Montré is actively involved in economic, social and environmental justice efforts through roles with NAACP of Wisconsin, Waukesha County NAACP, Wisconsin Climate Table, Wisconsin Environmental Justice and Infrastructure Initiative and Midwest Building Decarbonization Coalition. He's also a board member of the Fondy Food Center. **He hopes to bring representation for**

communities of color to the CUB board of directors and to facilitate connections between CUB and underserved communities.



CAROL STEMRICH

Carol holds a BS from the University of Wisconsin in Civil and Environmental Engineering. Carol from **Verona** retired from the Public Service Commission of Wisconsin in 2016 after more than 30 years of service. In her last eight years there she served as an Assistant Administrator in the Division of Energy Regulation. As an Assistant Administrator, Carol directly supervised PSC staff responsible for analysis, development and enforcement of electric and natural gas rate, finance, and accounting proposals and policies. She also provided oversight of Wisconsin's

statewide energy efficiency and renewable programs (Focus on Energy). Carol's PSC experience has provided insights to the CUB Board and staff regarding the institutional workings of the commission. **Her broad understanding of numerous disciplines provides the CUB Board with insights regarding the effect various policies are likely to have on the cost of electric and natural gas service to residential and small commercial customers.** Carol was elected to the board in 2017.





CUB WORKING WITH SMALL BUSINESS

We have supported our small business members in many ways:

- **Advocacy**, by sharing information about the public comment periods tied to We Energies & WPS rate cases, and informing small businesses about looming increases in their rates.
- **Representation, by calling for fair utility rates for small businesses.** We urged the PSC to make the large (i.e. big business) utility customers pay their fair share, and lessen the load on small businesses.
- **Education and engagement**, by hosting webinars focused on helping businesses reduce their energy consumption and plan for Wisconsin's clean energy transition.



COMMUNITY OUTREACH:

CUB is available to speak to your chamber of commerce or business organization about how to save on energy costs along with tools and resources for small businesses. Contact Tom Content at content@cubwi.org to learn more.



SPOTLIGHT ON MENTORING ACTIVITIES AT CUB

BUSINESS FINANCE MENTORSHIP

Dr. Steve Kihm, CUB's Regulatory Strategist for Economics and Finance, worked with **Madison resident Bhairvi Manglani, who's pursuing a graduate business degree in finance.** Bhairvi's research supported Steve's testimony in several cases and helped CUB advocate for reconsideration of how regulators set utility profit rates, also known as returns on equity (ROE).



LEGAL EXTERNSHIP PROGRAM

CUB General Counsel Cara Coburn Faris launched a new legal externship program in conjunction with the [University of Wisconsin Law School](#) to provide **third-year law students interested in pursuing careers in energy, utility, or administrative law with breadth and depth of experience in utility law and regulation.** CUB welcomed **inaugural Law Clerk Extern Gabrielle Lattery, who worked on issues directly relevant to CUB's litigation and policy goals.** Not only did Gabrielle leave CUB with useful analyses and memos, but she filed a comment with the Federal Energy Regulatory Commission (FERC) and landed herself an associate position at a D.C. law firm that specializes in administrative advocacy.



LOOKING AHEAD FIVE RATE CASES PLUS AFFORDABILITY FOR LOW INCOME CUSTOMERS IN THE SPOTLIGHT IN 2023

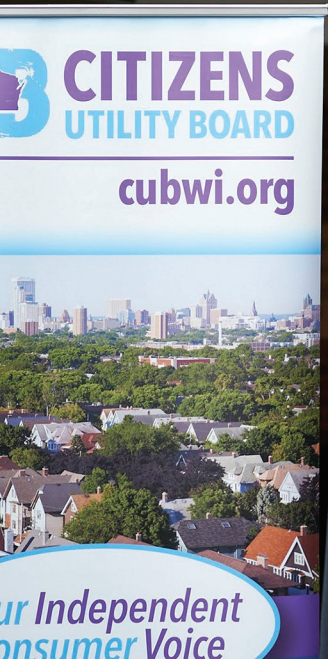
RATE CASES COMING

Wisconsin's five large investor-owned utilities are expected to seek [rate cases](#) starting in January. CUB will be actively involved in these cases. After the PSC reduced profit rates for We Energies and Wisconsin Public Service late last year, CUB will advocate for lower utility profit rates for customers of the other three utilities, Xcel Energy, Alliant Energy and Madison Gas and Electric. We will support the PSC staff as it audits the utility proposals in search of savings.

EFFORTS FOR CUSTOMERS STRUGGLING TO MAKE ENDS MEET

After collaborations with CUB during 2022, Xcel Energy in March proposed a first for Wisconsin electric and natural gas utilities an income-based [affordability program](#) designed to help customers who are struggling the most. The program is modeled on similar programs that Xcel already has in place in other states, including Colorado and Minnesota. These programs aim to assist low-income customers by providing discounts to bring their overall household energy burden down. The proposal aims to benefit all customers by reducing the size of unpaid bills that get passed on to other customers. Xcel's targeted affordability initiative is being reviewed by the state Public Service Commission this year. In 2023, CUB will work with We Energies and [Walnut Way Conservation Corp.](#) in Milwaukee's Lindsay Heights neighborhood to help low-income customers of We Energies and Wisconsin Public Service Corp.





HELP CUB CONTINUE OUR GREAT WORK

Thanks to your support, CUB is the independent, nonprofit and nonpartisan voice of Wisconsin residential and small business ratepayers fighting for fair and reasonable utility rates before the PSC, the courts, and the Legislature. **Since our inception in 1979, we have saved customers \$1,000 on average for every \$1 contributed to CUB. Our savings to customers in the last five years is more than \$500 million, including \$39.8 million in 2022.**

Utilities and big businesses have deep pockets. This allows them to lobby the PSC and Legislature. But homeowners, renters and Main Street businesses don't have that luxury. That's where CUB comes in. Every time a utility proposes to raise your prices or change the services you receive, we make sure your voice is heard.

Because of your support, CUB can continue to monitor more than 12,000 documents filed each month with the PSC for developments that affect your utility service. You help us continue to testify before the PSC and lobby Wisconsin policymakers in favor of laws that enhance consumer protections.

Thank you for helping to ensure that hard working residential and small business utility customers have money back in their pockets.



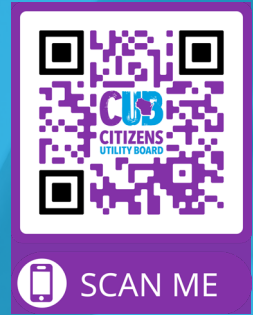
HOW CAN YOU GET INVOLVED

GIVE

YOUR SUPPORT AND MEMBERSHIP MATTER.

Builds awareness of CUB through more education and outreach.
Helps CUB strive to make progress for low-income customers.
Strengthens the long-term viability of CUB.
Expands CUB's reach to exert more power and influence on your behalf.

IT IS EASY TO CONTRIBUTE. PLEASE VISIT [HTTPS://CUBWI.ORG/DONATE/](https://cubwi.org/donate/)



EDUCATE

UTILITY BILL CLINICS

Want to help educate your business association, workplace or community group about actions they can take to save money on their utility bills? Invite CUB to provide a short educational talk, and then ask your members to bring their utility bills with them. These sessions provide an opportunity for utility customers to dive in and find ways to save. Topics we explore include: Simple Steps Toward Savings, Time-of-Use Rates – Are They Right for You? and an overview of some of the key cases in front of the PSC.

ADVOCATE

ATTEND A PUBLIC HEARING OR COMMENT ON UTILITY CASES!

Make your voice heard. All five investor-owned utilities in Wisconsin will be seeking increases this year. Get involved directly in the rate case by testifying at a PSC public hearing or submitting a public [comment on the PSC website](#). Tell the PSC how rate increases affect you, your household finances, and your pocketbook in the context of other cost pressures you and your family are facing. Telling your own story in your own words is what matters most.

