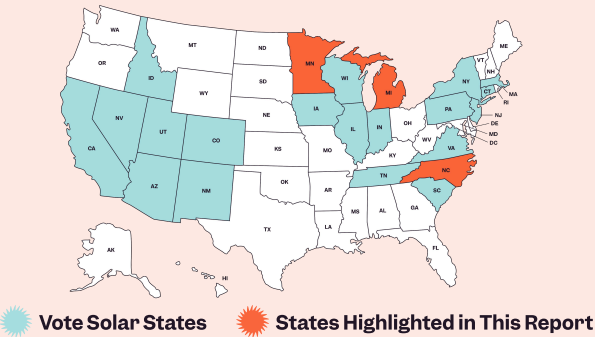


Q3 2026: Impact Report

Powering Clean Energy Progress Across the U.S.



VOTE SOLAR



National Overview



42 Legislative
Campaigns
Across 15 States



82 Regulatory
Proceedings
Across 22 States



90 Filings and
Expert Testimonies
Submitted



174
Media
Hits

① North Carolina

In the recent Duke Energy Carolinas rate case, Vote Solar — along with the North Carolina Justice Center, North Carolina Housing Coalition, and the Southern Alliance for Clean Energy, represented by the Southern Environmental Law Center — filed joint testimony focused on the return on equity, large load tariffs, and cost allocation aimed at shifting less of the burden onto residential customers. Duke had requested a steep rate increase on the heels of previous increases, prompting significant public outcry. The Public Staff, typically a moderate voice in these proceedings, pushed back in its direct testimony and recommended adopting a large load tariff that Duke had previously argued was unnecessary.

In rebuttal, Duke made a major concession: it significantly cut its requested rate increase nearly in half and agreed to a large load tariff, though weaker than the Public Staff's proposal. This process has resulted in a proposed settlement agreement that further reduced the rate increase and return on equity from Duke's rebuttal position, and as such already reflects three of Vote Solar's central goals: a smaller rate increase, a lower return on equity, and a path toward a large load tariff.

While the outcome is a big improvement from the original proposal, Vote Solar decided to not join the settlement agreement, which both enables us to publicly speak out about the rate case and other issues while also preserving our position for future settlements. As the Commission considers the proposed settlement, activity to develop a large load tariff continues in the docket. The Commission issued a strong straw proposal that included some specific provisions Vote Solar advocated for, and is in the process of receiving input from parties. We expect a large load tariff to be in place starting 2027.

② Michigan

In September, the U.S. Court of Appeals for the D.C. Circuit ruled that the Trump administration's Department of Energy (DOE) illegally forced the J.H. Campbell coal-fired power plant in West Olive, Michigan to keep running past its planned retirement date, siding with Vote Solar and other intervenors who had fought the DOE's order. A unanimous three-judge panel vacated DOE's order, finding the agency has no authority to override a state-approved retirement plan simply because it disagrees with the decision. Michigan regulators and Midcontinent Independent System Operator (MISO), the regional grid operator, had already approved Consumers Energy's plan to retire Campbell and replace it with cleaner, more affordable power. DOE intervened anyway, over the objections of the very utility and grid operator it claimed to be protecting, and then renewed what was supposed to be a 90-day emergency order four separate times, stretching it to roughly 450 days and costing Michigan households \$259 million dollars (and counting) as of June 30th.

Consumers Energy first proposed retiring Campbell in 2021 and finalized a settlement in 2022 with the Michigan Attorney General, environmental groups, and state regulators to retire the plant by May 31, 2025 and replace it with new gas generation, extended operation at existing units, and additional solar and battery storage. Days before that retirement date, DOE forced Campbell to keep operating, without any request from Consumers Energy or MISO.

Vote Solar joined Michigan, Illinois, and Minnesota, along with the Sierra Club, NRDC, Earthjustice, Michigan Environmental Council, Environmental Defense Fund, Environmental Law & Policy Center (ELPC), and other groups in challenging the order. We hope that the ruling will serve as a

precedent for similar cases in which Vote Solar has intervened, such as the Craig Station Unit 1 plant in Pueblo, Colorado.

③ Minnesota

In July, the Minnesota Public Utilities Commission (MPUC) accepted Xcel Energy's Integrated Distribution Plan (IDP) during its deliberative meeting, siding with Vote Solar and our partners (ELPC and Cooperative Energy Futures) on nearly every issue for which we advocated. The IDP provides a long-term roadmap for Xcel's local grid planning and strategy and provides guidance for the Commission's decisions on specific cost recovery requests from the utility in its rate cases. Xcel now must file a community power network (also known as virtual power plant) pilot by March 1, 2027, recognizing that flexible, customer-owned resources like rooftop solar and batteries are key to Minnesota's clean energy future.

Other major provisions include: technical workshops regarding valuation of reliability in distribution proceedings; a comprehensive Wildfire Mitigation Plan; an engineering audit of Xcel Energy's technical standards; improvements to flexible interconnection processes; and discussion of further improvements to the IDP process, including towards integrating equity considerations into Xcel Energy's planning and budgeting. Xcel's original IRP left residential and customer-side resources at the curb in favor of utility-owned resources, but Vote Solar never gave up on community power, advocating for distributed energy at every step of the process.

Quick Hits

Expanding Plug-in Solar in New Jersey and California: New legislation in each of these states will eliminate barriers to plug-in solar, making it easier for more households— even those without rooftop access— to adopt affordable solar systems and reduce their energy bills. In New Jersey, Governor Mikie Sherrill signed the Garden State Balcony Solar Act (S2368/A4836) in August, expanding access to solar and adding another tool to help address rising energy costs across the state. As part of the NJ Shines coalition, Vote Solar helped craft the policy, built robust legislative support, and saw it over the finish line. Meanwhile, SB 868, a plug-in solar bill to help expand access to solar and energy bill savings across California, passed both legislative chambers this year with bipartisan support and is now awaiting Governor Newsom's signature. Vote Solar worked in coalition with partners, deployed our lobbyists, and mobilized our members to take action in support of the bill.

Defending Fair Solar Compensation in Utah: Rocky Mountain Power (RMP) had previously proposed severe cuts—up to 90%—to solar avoided cost pricing, which undervalues the electricity solar provides and makes it harder and more expensive to build the solar farms the grid desperately needs. Vote Solar filed comments that helped convince the Utah Public Service Commission to freeze RMP's proposal. In its September 2026 compliance filing, RMP dropped changes that it previously proposed, and solar compensation prices increased. Vote Solar also successfully defended fair compensation for solar Qualifying Facilities. Fair avoided cost pricing helps to support fair valuation for programs like the Utah Renewable Communities program, which provides 100% renewable energy to residents across 19 Utah cities and counties.