

2017 Residential Programs EM&V Key Observations and Recommendations

The EM&V key observations and recommendations were categorized according to the degree of impact they have on the implementation of the Save on Energy programs and the program results. High impact recommendations (Table 1) which can be actioned within the current Conservation First Framework (CFF) were responded to by both representatives of the Independent Electricity System Operator (IESO) and the Joint Program Operations Committee (JPOC). JPOC helps inform key activities aimed at enhancing the performance of new and existing province-wide CDM programs. Medium and low impact recommendations (Table 2) were responded only by the IESO.

Table 1 - High Impact Recommendations

| NO. | PROGRAM | KEY OBSERVATIONS | 2017 EM&V RECOMMENDATIONS | IMPACT | IESO RESPONSE | JPOC RESPONSE |
|-----|-----------------------------|---|---|--------|--|---|
| 1. | Instant Discount Program | <p>The Instant Discount program performs as well as the Coupons program in generating participation and savings.</p> <ul style="list-style-type: none"> The Instant Discount program's first event in fall of 2017 generated 88% of the participation realized by the Coupons program's spring 2017 event, but it achieved slightly higher net savings (443 GWh compared to 421 GWh). Overall, the Instant Discount program's performance was sufficiently close to the Coupons program's biannual event performance, which indicate that the Instant Discount program design is as effective as the Coupons program design. Considering this was the first implementation year, with some extra set-up and learning required by all partners (such as the initial POP set-up by retailers, training retailers on new program rules, etc.), strong potential exists for the Instant Discount program to outperform the Coupons program's biannual event design in the short term. | <ul style="list-style-type: none"> The IESO should continue to offer the Instant Discount program in its current form, and it should expand the program to include spring and fall events in the near term. | High | <ul style="list-style-type: none"> The IESO operated a Spring and a Fall Instant Discount event in 2018 and preliminary findings indicate that the market has fully adapted. The IESO will continue to investigate opportunities to improve the program offering. | <ul style="list-style-type: none"> Members have received feedback that a number of LDCs do not feel comfortable proceeding with the Spring 2019 event until data and costs from the Fall 2018 event has been received and reviewed, however, the committee agrees there is great value in getting direct feedback from the LDCs in regards to the scope and frequency for 2019 events. |
| 2. | Instant Discount Program | <p>Retailers need greater lead time to ensure they have appropriate stock levels of program-eligible products.</p> <ul style="list-style-type: none"> While some retailers learned about the program in the spring, the IESO and the delivery agent did not select participating retailers until closer to the promotion period. Two retailers said the product approval process was too slow, making it challenging to stock program-approved products in time for the event. Some retailers ran out of stock before the promotion ended and removed program signage, which caused confusion for customers as program advertising continued however products were not available in stores. | <ul style="list-style-type: none"> Work with retailers to understand how far ahead of promotion dates they require approved product lists. If retailers' required lead time exceeds the required timing for the Request for Expression of Interest process and expected launch date, consider opening the RFEI process to preapprovals for specific retailers to allow them adequate time to meet required product stock levels. | High | <ul style="list-style-type: none"> The IESO and LDCs may not be in position to commit to upcoming events with the advanced notice requested by Retailers. The IESO understands these concerns and will plan to provide as much advance notice to retailers as possible considering their requirements to purchase products to stock for events. | <ul style="list-style-type: none"> As above. |
| 3. | Heating and Cooling Program | <p>Energy and demand savings for air-source heat pump measures were lower than reported.</p> <ul style="list-style-type: none"> While evaluated savings were approximately 40% lower than anticipated, results are similar to heat | <ul style="list-style-type: none"> Continue working with LDCs to facilitate a billing analysis (monthly bills or AMI data) evaluation for this province-wide program. Currently there is no way to | High | <ul style="list-style-type: none"> The IESO recommends launching a Task Committee, in collaboration with LDCs, to review issues identified with the Heating and Cooling Program. This | <ul style="list-style-type: none"> Members agree that a new task committee should be set up to review the findings and recommendations described. |

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| | | <p>pump pilot programs evaluated using billing data in 2017 and 2018. The evaluator also benchmarked results against studies performed in similar climates and found comparable results.</p> | <p>verify that heat pumps are installed in locations that meet all program requirements, most notably, the stipulation that electric heating equipment provide at least 70% of the home's heating load. If available, AMI data can be used to confirm equipment are installed in locations that rely on primarily electric heating. Furthermore, include a comparison group that did not receive program treatment to net out exogenous factors.</p> <ul style="list-style-type: none"> Collect additional data points to provide more detail about the homes where heat pumps are installed. These additional data would help inform the measure level savings and include: type of heating equipment in the home (and their associated fuel type), primary heating system and fuel type prior to heat pump install, type of cooling equipment in the home, primary cooling system before and after HP install, anticipated heat pump use (e.g., primary, supplemental), and home size. | | <p>committee should consider updating eligibility criteria to address the lower than reported savings for the air source heat pump measure.</p> | |
| 4. | Heating and Cooling Program | <p>Many of the new measures offered through the Heating and Cooling program in PY2017 were not cost-effective.</p> <ul style="list-style-type: none"> These included the air-source heat pump measures that added new cooling load, as well as the SEER 18 CAC measure. Air-source heat pump measures adding AC load were least cost-effective while those replacing AC systems were cost-effective or closer to being cost-effective (TRC =1). The incremental measure cost for heat pump measures came from the program redesign business case and costs for the SEER 18 CAC were from the IESO's 2018 MAL. | <ul style="list-style-type: none"> Review the incremental measure cost regularly. As the air-source heat pump market in Ontario matures, the cost may decrease over time, thus contributing to improved TRC results and allowing for decreased rebates to improve the PAC test. To determine baseline assumptions of equipment and cooling load, conduct surveys to determine whether customers would have acquired cooling if no air-source heat pump incentive were provided. | High | <ul style="list-style-type: none"> The IESO recommends launching a Task Committee, in collaboration with LDCs, to review the eligibility of cost ineffective measures. | <ul style="list-style-type: none"> As above. |
| 5. | Heating and Cooling Program | <p>Inconsistencies in program data resulted in discrepancies in total reported program savings.</p> <ul style="list-style-type: none"> The evaluator identified consistency issues within program reporting data, specifically regarding savings assigned to projects installing a CAC 15.0 | <ul style="list-style-type: none"> Update the HVAC program database to be consistent with Impact Reporting Template such that each piece of rebated equipment is entered as an individual line item. For example, | High | <ul style="list-style-type: none"> The IESO recommends launching a Task Committee, in collaboration with LDCs, to determine if changes need to be made to Contractor Participant Agreements and other program | <ul style="list-style-type: none"> As above. |

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| | | SEER and furnace with ECM. As a result, the reported demand savings in the PY2017 Impact Template did not match demand savings in the program tracking (VAS) data. | <p>consider a project resulting in installation of a CAC and an ECM. In the current database structure, this would be entered as a single measure: "CAC and ECM." This project, however, should be tracked as two separate database entries. One line would correspond to the CAC and would list all CAC-specific data. The second line would correspond to the ECM and its associated data. If appropriate, a second summary could roll measure-level information up to the project level.</p> <ul style="list-style-type: none"> Consider creating a new measure in the tracking database to more accurately reflect potential energy savings associated with different permutations of the furnace with ECM measure. Projects that include a new furnace with ECM installed along with a new ducted heat pump have different savings compared to a furnace with ECM installed alone or with a CAC and should be tracked accordingly. | | documentation to ensure more granular data is being collected and reported to the IESO. | |

Table 2 - Medium and Low Impact Recommendations

| NO. | PROGRAM | KEY OBSERVATIONS | 2017 EM&V RECOMMENDATIONS | IMPACT | IESO RESPONSE |
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| 1. | Instant Discount Program | <p>The 10-bulb limit presented an obstacle for retailers and customers.</p> <ul style="list-style-type: none"> Three of 10 retailers interviewed reported challenges with setting up their point-of-sale (POS) systems to handle the 10-bulb limit. Specifically, the 10-bulb limit could not be evenly divided by many common pack sizes (i.e., three, four and six-packs), leading to situations where partial packs were incentivized. This caused confusion for both customers (who did not understand why prices differed if they bought multiples of the same pack) and sales associates (who processed the discounts and explained them to customers). | <ul style="list-style-type: none"> The evaluation team supports adjustment of the limit to 12 bulbs per customer for the fall PY2018 promotion. | Low | <ul style="list-style-type: none"> This recommendation is currently being investigated as a potential update for the program in 2019 through the Instant Discounts Task Committee. |
| 2. | Instant Discount Program | <p>Retailers overestimated the sales performance of program-eligible lighting products.</p> <ul style="list-style-type: none"> The program only used 66% of its planned incentive budget for the fall 2017 promotion. Sales may have been lower than forecasted due to: | <ul style="list-style-type: none"> The delivery agent should work with retailers to set a realistic forecast reflecting the program and retailers' improvements, and lessons learned from the Fall 2017 event regarding reduced customer response as incentives are reduced and LED saturation increases. | Low | <ul style="list-style-type: none"> Retailers and the IESO now have had experience with delivering two events and are in better position to predict forecasted sales for future events. |

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| | | <ul style="list-style-type: none"> ➤ Lower incentives, relative to the Coupons program ➤ Stocking issues at some retailers ➤ LED market saturation (given LEDs' long useful life) | | | |
| 3. | Heating and Cooling Program | <p>Program participation is not well diversified, with 95% of net savings coming from the furnace with ECM measure. Nearly one-half of savings associated with this measure result from fuel switching as participants replaced an electric furnace with a fossil fuel furnace.</p> <ul style="list-style-type: none"> • Contractors and distributors reported high sales percentages for furnaces equipped with ECMs; with upcoming energy efficiency standards for furnace fan motors, savings attributable to the ECM may shrink. Although adding heat pumps and thermostats to the program improved the diversity of measure offerings, additional uptake will be required to better diversify the source of savings. | <ul style="list-style-type: none"> • Examine additional measures for inclusion in the program (such as for electrically heated homes heat recovery ventilators, insulation, ventilation fans, duct sealing and air sealing). Other programs in Canada, such as BC Hydro (in partnership with Fortis BC), currently offer similar measures. | Medium | <ul style="list-style-type: none"> • The IESO will review the Heating and Cooling Program, taking the current fuel switching policy into consideration. |
| 4. | Heating and Cooling Program | <p>Participation in new measure offerings was lower than estimated in the Redesign Business Case and significantly lower than previous measure offerings.</p> | <ul style="list-style-type: none"> • Consider ways to boost participation in the Heating and Cooling Program's heat pump measures, such as additional direct marketing to customers and training or informational sessions for contractors to gain contractor confidence in the measures. • When developing new measure offerings, solicit feedback from a variety of industry stakeholders (e.g., contractors, distributors, trade organizations such as HRAI). These organizations have insights into technical or economic barriers that influence measure uptake. • Work with contractors to target customers with boilers to increase the number of ECM circulator pumps rebated by the program or consider dropping it if no uptake continues in PY2018. | Medium | <ul style="list-style-type: none"> • The IESO recommends launching a Task Committee, in collaboration with LDCs, to review issues identified with the Heating and Cooling Program including boosting participation and soliciting increased feedback on both current and potential new measures. |
| 5. | Heating and Cooling Program | <p>The team found the 18.0 SEER CAC measure had dramatically lower participation levels than the 14.5 and 15.0 SEER CAC measures.</p> <ul style="list-style-type: none"> • In the case of high-efficiency air conditioners, contractor and distributor interviews indicated that incentives may not be sufficient to drive uptake in the measures as the current incentive and energy savings do not offset incremental costs over the equipment's lifetime. Several contractors noted that they don't recommend 18.0 SEER CACs because of a lack in return of investment for their customers. | <ul style="list-style-type: none"> • Consider revisiting the baseline assumption for CAC measures. Distributors reported they have seen CAC sales move from mid-tier equipment (SEER 14 to SEER 16) towards low-tier equipment (SEER 13). Additionally, lack of a mid-tier CAC measure seems to have resulted in a large shift in CAC purchase tendencies; distributors indicated sales of 13.0 to 14.0 SEER CACs increased while sales of higher efficiency units decreased. • As contractors don't currently recommend 18.0 SEER CACs consider offering a lower cost alternative such as room- or window-air conditioner measure. Ontario has a relatively small annual cooling load, and customers may not recover | Medium | <ul style="list-style-type: none"> • The IESO will investigate the Heating and Cooling recommendation to review high efficiency CACs through the aforementioned Task Committee, in collaboration with LDCs. |

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| | | | incremental costs associated with CACs. Window air conditioners have lower initial costs and may offer a more cost-effective option for the heating-driven region. To avoid encouraging load building, offer the incentives to those that retire an existing window or room air conditioning unit. | | |
| 6. | Heating and Cooling Program | <p>Despite contributing minimal energy savings as a standalone measure, the 15.0 SEER CAC measure had a NTGR of approximately 175% and encouraged participation in other energy efficiency measures.</p> <ul style="list-style-type: none"> Though gross measure savings were not large, participants installing a 15.0 SEER CAC reported the same free ridership levels as participants installing an 18.0 SEER CAC. The NTGR for this measure is high due to a high spillover percentage (106%), largely coming from weatherization and lighting, indicating the measure may serve as a stepping-stone that helps introduce participants to making energy efficiency improvements. | <ul style="list-style-type: none"> Consider offering a lower-efficiency CAC measure. Although the 15.0 SEER measure was not cost-effective (TRC ratio of 0.22), it was more cost-effective than the 18.0 SEER measure (TRC ratio of 0.14) and prompted high levels of spillover participation. To avoid incenting load building, only offer rebates to those also retiring an existing air conditioning unit. | Medium | <ul style="list-style-type: none"> The IESO will investigate the Heating and Cooling recommendation of reviewing high efficiency CAC measures through the aforementioned Task Committee, in collaboration with LDCs. |
| 7. | Heating and Cooling Program | <p>Distributor interviews indicated that, in the absence of the Heating and Cooling program, the market might revert to less efficient furnace motors.</p> <ul style="list-style-type: none"> Nearly all of the distributors reported that program rebates are a contributing factor to the increase in sales of efficient furnace motors over the last three years. Based on distributor feedback, provincial furnace sales could shift back towards units that are not equipped with ECMs in the absence of rebates for ECM-equipped models. | <ul style="list-style-type: none"> Continue to incentivize the furnace with ECM measure through at least 2019 when the new furnace fan standard goes into effect. While it is not possible to assess the impact of the new standard on energy savings or manufacturing practices, distributor interviews clearly indicate that eliminating the incentive will reduce the number of units sold. | Medium | <ul style="list-style-type: none"> The IESO will conduct further investigation into market dynamics of ECMs through the aforementioned Heating and Cooling Task Committee, in collaboration with LDCs. |
| 8. | Heating and Cooling Program | <p>The Heating and Cooling program has significantly impacted efficient equipment sales within the Ontario HVAC market.</p> <ul style="list-style-type: none"> Distributors reported a noticeable increase in the percentage of CACs sold that fell below 14.5 SEER in PY2017, pointing to the lack of rebates for SEER 14.5 and 15.0 CACs as a contributing factor. Distributors expressed similar sentiments for all other Heating and Cooling measure offerings, noting that increases in equipment efficiency and sales of efficient equipment are partially attributable to the program. Based on distributor feedback and reported equipment sales percentages, it seems likely that provincial CAC sales will shift towards lower-efficiency (13 SEER) equipment without rebates for mid-efficiency units. | <ul style="list-style-type: none"> Consider leveraging existing partnerships and establish new partnerships with regional and provincial trade organizations, distributors and equipment manufacturers. Some of these organizations have access to large quantities of market data and may be able to share data or insights to help inform program planning and evaluation. For example, HRAI publishes quarterly reports on shipments by equipment type. The public reports do not provide adequate detail to assess market shares by efficiency level, but such data may be available to HRAI members or affiliates. | Medium | <ul style="list-style-type: none"> The IESO will conduct further investigation into market dynamics through the aforementioned Heating and Cooling Task Committee, in collaboration with LDCs. |
| 9. | Heating and Cooling Program | <p>While energy efficiency is important to participants, many selected their equipment over other options due to non-energy benefits.</p> <ul style="list-style-type: none"> Participants indicated that they selected efficient equipment as it offered benefits such as increased comfort and home value. | <ul style="list-style-type: none"> Leverage perceived correlations between non-energy benefits and efficient equipment to market efficient equipment. Contractor trainings could be enhanced to include additional information about perceived non-energy benefits, such as additional comfort and increased home value that may be appealing to customers. | Medium | <ul style="list-style-type: none"> The IESO is undertaking a study on non-energy benefits in the Ontario market that may provide additional information to support messaging and will consider developing additional contractor training initiatives and marketing materials to help communicate non-energy benefits |

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| | | | | | to consumers. |
| 10. | Heating and Cooling Program | <p>While many participants recalled receiving tips on how to operate their equipment efficiently, not all of them recalled the tips.</p> <ul style="list-style-type: none"> Additionally, not all tips that contractors shared, such as efficient temperature settings for furnaces, were consistently reinforced through contractor training and the program handout. | <ul style="list-style-type: none"> While contractors and program handouts provide recommendations for efficiently operating new equipment, the IESO has an opportunity to further reinforce key efficiency messages, possibly by sending a succinct flyer reinforcing operating tips with customers' incentive checks. These flyers should focus on the most important operating tips to minimize use of back-up and auxiliary heat as well as deep temperature setbacks for heat pumps during winter. For furnaces and CACs, the flyers should include consistent messages regarding energy-saving setbacks. This flyer should be tailored to specific equipment rebated and should acknowledge that participants will achieve additional savings while maintaining a comfortable home by following the tips. | Medium | <ul style="list-style-type: none"> The IESO, in collaboration with LDCs and its delivery partners, will consider developing additional contractor training initiatives focused on customer messaging. |
| 11. | Residential New Construction (RNC) | <p>Like last year, RNC is not cost effective due to the low measure-level benefits as compared to the incremental costs of measures.</p> <ul style="list-style-type: none"> All measures except ENERGY STAR-certified LED, outdoor motion sensor and outdoor lighting timer have a measure-level TRC less than 1. The benefits of some RNC measures may be underestimated. The IESO does not track gas savings. However, the HOT2000 file review found that all files reviewed were comprised of homes heated with natural gas. Including these gas benefits in the TRC for EnerGuide track increased the overall program TRC marginally from 0.34 to 0.43. While, the Cadmus team did not have the information available to estimate gas savings that resulted from ENERGY STAR track homes, it is likely these measures also produce gas savings. Interviews with builders also showed that non-energy benefits play a role in how builders sell their homes to meet the interests of homebuyers. Non-energy benefits are currently not accounted for in the program's cost-effectiveness analysis, underestimating the benefits of the program. | <ul style="list-style-type: none"> Consider accounting for non-electrical savings (e.g. natural gas). | Low | <ul style="list-style-type: none"> The IESO, in collaboration with LDCs, has set a Preliminary Application deadline of December 19, 2018, and will not be accepting preliminary applications after that. As a result, the current RNC will no longer be an active program. All recommendations will be considered should a new residential new construction program be designed in the future. |
| 12. | Residential New Construction (RNC) | <p>The EnerGuide Rating system which drives the RNC EnerGuide Performance track is evolving.</p> <ul style="list-style-type: none"> While reviewing the EnerGuide files, the team learned that NRCan updated the EnerGuide Rating System to version 15 and is expected to retire the 0-100 rating system by the end of 2018. The new rating system provides a consumption-based rating measured in gigajoules per year. | <ul style="list-style-type: none"> The program should align with updates to EnerGuide Rating System. Evaluation of Performance track savings relies on access to HOT2000 and ENERGY STAR files. The program redesign should ensure that a partnership agreement is negotiated with NRCan and ENERGY STAR to ensure that compliance documents are available for all Performance track projects. Those documents are essential to calculate accurate savings for each measure of | Low | <ul style="list-style-type: none"> The IESO, in collaboration with LDCs, has set a Preliminary Application deadline of December 19, 2018, and LDCs will not be accepting preliminary applications after that. As a result, the current RNC will no longer be an active program. All recommendations will be considered should a new residential new |

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| | | | the Performance track projects. | | construction program be designed in the future. |
| 13. | Residential New Construction (RNC) | <p>The potential for significant savings from residential lighting after 2021 is uncertain.</p> <ul style="list-style-type: none"> A large portion RNC savings (53%) comes from lighting measures, and, furthermore, lighting measures are the sole measures with a measure-level TRC above 1. However, as described in Instant Discount section, savings after 2021 is uncertain for these measures and the market transition to LEDs is likely to continue to erode the per-unit savings and the overall demand for lighting. | <ul style="list-style-type: none"> The program should plan for savings from lighting after 2021 to be significantly below current levels and look for opportunities to diversify to other cost-effective measures. | Low | <ul style="list-style-type: none"> The IESO, in collaboration with LDCs, has set a Preliminary Application deadline of December 19, 2018, and LDCs will not be accepting preliminary applications after that. As a result, the current RNC will no longer be an active program. All recommendations will be considered should a new RNC program be designed in the future. |
| 14. | Residential New Construction (RNC) | <p>While there are a number of builders who participate in the program, 51% of program savings results are from one large builder.</p> <ul style="list-style-type: none"> Over half of program savings are from one large builder participating in the prescriptive and performance tracks. Larger builders, like this one, reported needing more time to plan and take into account program changes, with these builders reporting needing a minimum of one year and up to three years to respond to program changes. | <ul style="list-style-type: none"> The program should work closely with this large builder to get insights and input on how best to work to engage other large builders in the program. Changes to the program should be communicated ahead of time so that large builders can incorporate changes into their planning. | Low | <ul style="list-style-type: none"> The IESO, in collaboration with LDCs, will work with builders to determine opportunities for new program or training offerings in absence of RNC. |
| 15. | Residential New Construction (RNC) | <p>Municipalities are playing a role in influencing builders' efficient construction practices.</p> <ul style="list-style-type: none"> Two builders reported being motivated by municipal requirements to build above code as part of subdivision or planning agreements between the municipality and the builders. This presents both a challenge and an opportunity to the RNC Program. These types of agreements could increase the free ridership rate of the program, as builders must comply with the municipal requirement for the development. However, by partnering and working with municipalities to promote the program or increase their requirements, this activity could be leveraged to increase participation and savings levels. | <ul style="list-style-type: none"> Research and document what types of actions municipalities are taking with respect to efficient construction practices to understand impact to program. The redesign should consider opportunities to partner with municipalities to promote the program, further increase savings level above the building code, and align requirements to reduce burdens for builders. | Low | <ul style="list-style-type: none"> The IESO has set a Preliminary Application deadline of December 19, 2018, and LDCs will not be accepting preliminary applications after that. In absence of the RNC program, the IESO will work with LDCs to develop initiatives to continue to influence builders' efficient construction practices. |
| 16. | Residential New Construction (RNC) | <p>Delivery agent involvement continues to be important in supporting builders with program applications.</p> <ul style="list-style-type: none"> A few builders continued to find the paperwork required to complete the applications to be burdensome. However, most builders were satisfied with the support they received from delivery agents in smoothing out the application process for builders. Delivery agent support is particularly important in regions where LDC knowledge and support may be lacking, to mitigate these challenges for the participating builders. | <ul style="list-style-type: none"> The program should consider working with more delivery agents to help LDCs deliver the program and support builders in completing the application process. | Low | <ul style="list-style-type: none"> The IESO, in collaboration with LDCs, has set a Preliminary Application deadline of December 19, 2018, and LDCs will not be accepting preliminary applications after that. As a result, the current RNC will no longer be an active program. All recommendations will be considered should a new residential new construction program be designed in the future. |

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| 17. | Home Assistance Program | <p>The energy education module is likely contributing savings; however, more information is needed to quantify those savings.</p> <ul style="list-style-type: none"> Fifty-five percent of respondents indicated taking energy saving actions due to their HAP participation, such as turning off lights. However, quantifying the savings from these actions requires more data. | <ul style="list-style-type: none"> Analyze participant AMI data to allow for a more accurate assessment of total household savings, including the impacts from energy education. Alternatively, if AMI data are not available, develop deemed savings estimates for specific behavioral changes through secondary research and measure behavior changes during the evaluation using participant survey data. | Low | <ul style="list-style-type: none"> Through the Centrally Managed HAP, access to AMI data will be a challenge. However, the IESO is working to standardize the education module to ensure that it is consistently delivered to customers and that behaviour-based savings can be maximized. |
| 18. | Home Assistance Program | <p>Verified savings were less than reported due to updated unit savings and not all measures being directly installed.</p> <ul style="list-style-type: none"> Multiple versions of FAST led to inconsistencies in per-unit savings values in the reported data. Overall program realization rates were 54% for energy and 15% for demand. On a per-home basis, weatherization projects achieved higher savings than in previous years, while savings for basic and extended track measures (which contributed the largest share of verified savings) were lower than in previous years. Although ISR for most measures was above 80%, an opportunity for improvement exists as some measures, such as showerheads, faucet aerators, hot water tank or pipe wrap, and LEDs, were not actually installed during the audit visit and subsequently were not later installed by participants. | <ul style="list-style-type: none"> To maximize measure ISRs, instruct installers to directly install measures rather than leaving them behind for customers to self-install. Ensure all delivery agents are using the most current version of FAST. | Medium | <ul style="list-style-type: none"> The IESO has implemented a Centrally Managed Home Assistance Program delivery model beginning in 2018, where delivery will be performed across the province by one service provider managed by, and accountable to, the IESO. Through this model, service provider performance will be closely monitored, including adherence to program requirements by the service provider and their subcontractors. Direct installation of eligible measures is a core requirement in the delivery of the program, and the IESO will work with its service provider to ensure these findings are addressed. Given there is now a province-wide service provider, the IESO will ensure that only the most recent version of the FAST is being used in market. |
| 19. | Home Assistance Program | <p>Community partners, such as housing or community-service agencies (e.g. The Salvation Army) regularly interact with low-income customers and, while are resource constrained, they can connect with customers who may not respond to other marketing channels.</p> <ul style="list-style-type: none"> Community partners emphasized that successful engagement with low-income customers occurs via word of mouth and should involve front-line workers. Community partners recognize that some low-income customers who seek assistance with paying bills are focused on their urgent financial situations and are less likely to be motivated to take the time to apply for a program that will help them save money in the future. While community partners attempt to assist customers to the extent possible, they have constrained resources and may need financial support to prioritize their involvement with HAP. Delivery agents and community partners cited challenges in getting all the required documentation from customers and approval from landlords. | <ul style="list-style-type: none"> Future programming should consider the importance of and actively engage with community agencies as front-line partners, possibly by including financial support to help offset the burden of additional administrative work. Such assistance could come in the form of a small fee per completed application, and possibly bonuses for employees who attend training sessions given by the delivery agent. In addition, have the delivery agent explore the feasibility of partnering with municipal agencies that provide social assistance programs, by providing training and ensuring they have access to program information and application materials. Consider marketing directly to market-rate housing landlords to educate them about the benefits of installing program measures and to encourage their cooperation in | Medium | <ul style="list-style-type: none"> Within the Centrally Managed HAP, the IESO is leveraging a number of channels to drive participation. The IESO has provided options to LDCs to support the delivery of the Centrally Managed HAP – these options involve providing opportunities for LDCs to lead on the local and community-level customer outreach and engagement activities and are expected to help build and strengthen the ties to HAP among community agencies and front-line partners. In addition, the IESO has added a resource to help build partnerships with low income stakeholders and agencies across the province. |

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| | | | the approval process. | | |