

EVALUATION REPORT

2021-2024 CDM FRAMEWORK CAPABILITY BUILDING INITIATIVES PY2023

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This report summarizes Program Year 2023 (PY2023) achievements of the Capability Building Initiatives (CBIs) in the 2021-2024 Conservation and Demand Management (CDM) Framework. EcoMetric evaluated seven webinars, one coaching support, and six workshops in the PY2023 evaluation.

E.1 PROGRAM DESCRIPTION

The IESO's CBIs provide educational and training resources to increase energy efficiency knowledge and drive conservation actions that result in electric savings from key end uses, sectors, and channels in Ontario. The Initiatives are organized into three tiers:

- Foundational (Tier 1): Introductory training and basic knowledge aimed at organizations with limited experience and resources for energy efficiency.
- Specialized (Tier 2): More advanced training and resources aimed at organizations in key target sectors with a higher level of knowledge gained through training and project experience.
- Advanced (Tier 3): Direct support through the facilitation of integrated approaches to energy efficiency decision-making targeted at experienced organizations.

In the CBIs, a "project" refers to an ongoing or recurring initiative to educate and build capabilities among residents of Ontario through targeted information sharing. This evaluation focuses on the events included in Table 1. The webinars are considered Foundational (Tier 1) offerings, while the workshops and coaching cohorts are considered Specialized (Tier 2).

Table 1: 2023 CBI Projects

| # | Initiative | Targeted Sector | Provider | Method | Participants |
|----|--|---------------------------------------|----------|----------|--------------|
| 1 | Introduction to M&V | C&I | CIET | Webinar | 69 |
| 2 | Energy Management and Efficient Electrification Series: Municipalities – Energy Management Best Practices for Organizations | Municipalities | CIET | Webinar | 31 |
| 3 | Estimating Project Savings – Pumps & Fans | Industrial | CIET | Webinar | 75 |
| 4 | The Road to Implementing ISO 50001 | C&I, MUSH | CIET | Webinar | 58 |
| 5 | Creating Value from Your Building Energy Data | C&I, MUSH | CIET | Webinar | 66 |
| 6 | Existing Building Commissioning in a Nutshell | Building Owners & Channel partners | CIET | Webinar | 91 |
| 7 | Energy Management and Efficient Electrification Series: Energy Management Practices and Save on Energy Resources for Ontario Municipalities | Public | CIET | Webinar | 39 |
| 8 | Energy Analysis Coaching for School Boards | Schools | CIET | Coaching | 30 |
| 9 | Key Existing Building Commissioning (EBCx) Savings Opportunities | Building Owners & Channel partners | CIET | Workshop | 91 |
| 10 | "The 7 Steps" – A Practical Methodology for Energy Management | | BOMA | Workshop | 11 |
| 11 | Performance Analysis – How well do you know your building(s)? | | BOMA | Workshop | 14 |
| 12 | Existing Building Commissioning (EBCx) – Tune up & Save | | BOMA | Workshop | 43 |
| 13 | Developing a Retrofit Strategy for Your Building(s) – Your roadmap to big savings | | BOMA | Workshop | 61 |
| 14 | Renewable & Low-Carbon Energy – Economical Approaches to Addressing Energy Supply | | BOMA | Workshop | 56 |

E.2 EVALUATION OBJECTIVES

The primary focus of this evaluation was to assess the degree to which the Initiatives are enabling participation in the IESO's programs in the 2021-2024 CDM Framework, including the Retrofit Program, Strategic Energy Manager (SEM) Program, Existing Building Commissioning (EBCx) and Energy Performance Program (EPP). The evaluation also identified energy efficiency projects completed by Initiative attendees that were not incentivized by an IESO CDM program.

Annual energy savings and program attribution are not estimated for CBI due to the outsized challenge and cost of measuring savings and attribution for a program aimed primarily at boosting participation in other programs. Rather, **the evaluation objective is to monitor the enabling nature of CBI, study the far-reaching impacts of the Initiatives, gather participant feedback, and improve the reach of the Initiative.**

The process evaluation analyzes project and program participant and cost data and identify potential improvements to CBI delivery. Specific evaluation objectives included:

- Assess the degree to which the CBIs are influencing participation and savings in IESO CDM programs as well as energy efficiency projects outside of IESO programs,
- > Evaluate the effectiveness of CBI delivery, and
- > Determine opportunities to grow influence and improve evaluability of the Initiatives.

Specific questions EcoMetric researched included:

- How many CBI participants go on to participate in other IESO programs, and how much did the CBI influence their decision to participate?
- > What types of energy projects are these participants completing?
- What is the overall effectiveness and comprehensiveness of these programs?
- How does influence vary between the CBIs, if at all?
- How can CBI content, delivery, processes, and evaluability be improved to further IESO business goals and ensure positive customer experiences?

E.3 KEY FINDINGS AND RECOMMENDATIONS

The following findings and recommendations were identified during the evaluation as having greater importance. The comprehensive list of findings and recommendations is included in Section 5 and therefore the numbering in this section may not be sequential.

Finding 1: Respondents are satisfied with their CBI, rating their overall satisfaction at a mean of 7.9. Satisfaction varied by program element from an overall high mean rating of 8.1 for the quality of instructors to a low mean of 7.3 for clear next steps to implement what they learned. Satisfaction also varied by CBI category. Reduced satisfaction with the suitability of the CBI for respondent's level of experience with the topic carried through to most other areas of satisfaction. Specifically, those rating the suitability of the training to their experience level rated their overall satisfaction with the CBI at a mean of 5.9, satisfaction with the content offered in the CBI at a mean of 5.3, and satisfaction with what they learned at a mean of 5.7.

Recommendation 1: Consider offering additional information in CBI promotional material to guide prospective participants to the most appropriate level of training for their needs. Provide a list of all CBIs associated with a subject, the experience level they address, and a description of content.

Finding 5: CBI attendance had a moderate influence on the decision to implement an energy efficiency or conservation project, inside (mean of 6.5) or outside (mean of 6.5) a Save on Energy program. Some respondents requested additional information on Save on Energy programs and incentives, including more information about financial incentives for small municipalities. Other respondents requested information often presented in case studies, such as examples of real-world projects or challenges faced by different types of businesses.

Recommendation 5: Consider offering additional materials at initiatives that can create a direct, and simple path to participation in Save on Energy programs. A case study leveraging material covered in the training, real world project examples and additional information on program benefits may increase influence to participate and help to develop a business case for projects implemented through Save on Energy.

Finding 6: Some respondents (35%) reported having experienced non-energy benefits (NEB). The most common non-energy benefit reported was Operations & Maintenance benefits (24%), followed by improved thermal comfort (16%). Of those experiencing NEBs, 34% report experiencing two or more NEBs. Only a few respondents were able to place a value on the NEB, with one reporting that it is difficult to place a value on thermal comfort.

Recommendation 6: Consider including CBI participants in future NEBs studies with structured questioning on the quantification of non-energy impacts. Educate participants during the initiative about recognizing and valuing NEBs.

Finding 7: Existing participant data is insufficient to track channeling to Save on Energy programs or quantify potential spillover.

Recommendation 7: Consider collecting company data to allow analysis of channeling and spillover. This data could be supplied by adding fields for facility address and number of company facilities in Ontario to the CBI registration process. The Independent Electricity System Operator (IESO) retained EcoMetric to evaluate the 2021-2024 Conservation and Demand Management (CDM) Framework Capability Building Initiatives (CBIs) administered during PY2023 in Ontario. This report summarizes PY2023 achievements of the CBIs in CDM Framework. EcoMetric researched seven webinars, one coaching support, and six workshops.

Throughout this report, the terms "project," "event," and "initiative" are used interchangeably to refer to the webinars and coaching cohorts.

1.1 PROGRAM DESCRIPTION

The IESO's CBIs provide educational and training resources to increase energy efficiency knowledge and drive conservation actions that result in electric savings from key end uses, sectors, and channels in Ontario. Figure 1 depicts a sample of the webinar presentations for key CBIs.



Source: Save on Energy website, <u>Commercial training and support | Save on Energy</u>

This report relies on data and survey responses from participants who attended twelve CBI events during PY2023. Table 2 shows CBI projects completed in PY2023. CBI webinars and events are intended to:

- Provide building owners/operators and channel partners with the knowledge and resources to complete energy savings projects, and
- > Drive participation in Save on Energy incentive programs.

Table 2: 2023 CBI Projects

| # | Initiative | Targeted Sector | Provider | Method | Participants |
|----|--|---------------------------------------|----------|----------|--------------|
| 1 | Introduction to M&V | C&I | CIET | Webinar | 69 |
| 2 | Energy Management and Efficient Electrification Series: Municipalities – Energy Management Best Practices for Organizations | Municipalities | CIET | Webinar | 31 |
| 3 | Estimating Project Savings – Pumps & Fans | Industrial | CIET | Webinar | 75 |
| 4 | The Road to Implementing ISO 50001 | C&I, MUSH | CIET | Webinar | 58 |
| 5 | Creating Value from Your Building Energy Data | C&I, MUSH | CIET | Webinar | 66 |
| 6 | Existing Building Commissioning in a Nutshell | Building Owners & Channel partners | CIET | Webinar | 91 |
| 7 | Energy Management and Efficient Electrification Series: Energy Management Practices and Save on Energy Resources for Ontario Municipalities | Public | CIET | Webinar | 39 |
| 8 | Energy Analysis Coaching for School Boards | Schools | CIET | Coaching | 30 |
| 9 | Key Existing Building Commissioning (EBCx) Savings Opportunities | Building Owners & Channel partners | CIET | Workshop | 91 |
| 10 | "The 7 Steps" – A Practical Methodology for Energy Management | | BOMA | Workshop | 11 |
| 11 | Performance Analysis – How well do you know your building(s)? | | BOMA | Workshop | 14 |
| 12 | Existing Building Commissioning (EBCx) – Tune up & Save | | BOMA | Workshop | 43 |
| 13 | Developing a Retrofit Strategy for Your Building(s) – Your roadmap to big savings | | BOMA | Workshop | 61 |
| 14 | Renewable & Low-Carbon Energy – Economical Approaches to Addressing Energy Supply | | BOMA | Workshop | 56 |

1.2 EVALUATION OBJECTIVES

The primary focus is the degree to which the Initiatives are enabling participation in the IESO's programs active in the 2021-2024 CDM framework, including Retrofit, Energy Manager, and EPP. Annual energy savings and program attribution are not estimated for CBI due to the outsized challenge and cost of measuring savings and attribution for a program aimed primarily at boosting participation in other programs. Rather, the evaluation objective is to monitor the enabling nature of CBI, gather participant feedback, and improve processes.

The process evaluation and value for money components of this evaluation analyze project and program participant and cost data and identify potential improvements to CBI delivery.

Specific evaluation objectives included:

- Assess the degree to which the CBIs are influencing participation and savings in IESO CDM programs as well as energy efficiency projects outside of IESO programs,
- > Evaluate the effectiveness of CBI delivery, and
- > Determine opportunities to grow influence and improve evaluability of the initiatives.

Specific questions EcoMetric researched included:

- How many CBI participants go on to participate in other IESO programs, and how much did the CBI influence their decision to participate?
- What types of energy projects are these participants completing?
- What is the overall effectiveness and comprehensiveness of these programs?
- How does influence vary between the CBIs, if at all?
- How can CBI content, delivery, processes, and evaluability be improved to further IESO business goals and ensure positive customer experiences?

This section discusses the methods EcoMetric used to study the impacts of the Initiatives across the IESO's portfolio of programs, and the methods used to evaluate the design, delivery, and administration of the Initiatives.

2.1 PROCESS EVALUATION

The CBI evaluation focuses on influence in terms of education and enablement, rather than quantified savings impacts. Along with observations of overall program flow and participant feedback, recommendations are based on survey responses and project/program comparisons.

The process evaluation included a review of program materials, analysis of participant and budget data, and thematic analysis of survey outcomes that inform program administration. EcoMetric used survey results to research:

- Awareness of CBI and other Save on Energy programs
- Motivation to participate in CBI
- Satisfaction with CBI
- Change in familiarity and knowledge following CBI
- > Influence of CBI on the implementation of energy efficiency and conservation projects
- Non-energy benefits observed

This section details the process evaluation results of the CBIs in PY2023.

3.1 SURVEY SAMPLE CREATION AND RESPONSE RATE

EcoMetric created a sample by compiling the attendance records from all CBIs available, removing those records with incomplete contact information. EcoMetric noted that 28% of people attended at least two CBIs and structured the sample to focus each participant on one specific CBI, distributing the sample for representation across all CBIs. These processes resulted in a final sample featuring a low of 65% of attendees for "Key Existing Building Commissioning (EBCx) Savings Opportunities" to a high of 82% of attendees for "The 7 Steps" – A Practical Methodology for Energy Management" (Table 3).

| CBI Training Measure | Category | Level | Total Sample | Survey Invites Sent | Did Not Recall CBI | Survey Completes | Response Rate | Completion Rate |
|--|--|--------------|--------------|---------------------|--------------------|------------------|---------------|-----------------|
| Introduction to M&V | Understanding Energy Data | Foundational | 69 | 50 | 0 | 6 | 12% | 12% |
| Energy Management and Efficient Electrification Series: Municipalities – Energy Management Best Practices for Organizations | Understanding Energy Data | Foundational | 31 | 24 | 3 | 9 | 50% | 36% |
| Estimating Project Savings – Pumps & Fans | Industrial Energy Efficiency Potential | Foundational | 75 | 54 | 2 | 6 | 15% | 11% |
| The Road to Implementing ISO 50001 | Energy Management Support | Foundational | 58 | 41 | 2 | 4 | 15% | 10% |
| Creating Value from Your Building Energy Data | Understanding Energy Data | Foundational | 66 | 48 | 1 | 7 | 17% | 16% |
| Existing Building Commissioning in A Nutshell | Existing Building Commissioning | Foundational | 91 | 69 | 2 | 13 | 22% | 19% |

Table 3: CBI Sample and Response Rate

| CBI Training Measure | Category | Level | Total Sample | Survey Invites Sent | Did Not Recall CBI | Survey Completes | Response Rate | Completion Rate |
|---|--|------------------------|--------------|---------------------|--------------------|------------------|---------------|-----------------|
| Energy Management and Efficient Electrification Series: Energy Management Practices and Save on Energy Resources for Ontario Municipalities | Understanding Energy Data | Foundational | 39 | 30 | 2 | 5 | 23% | 17% |
| Energy Analysis Coaching for School Boards | Existing Building Commissioning | Foundational | 30 | 23 | 5 | 2 | 30% | 9% |
| Key Existing Building Commissioning (EBCx) Savings Opportunities | Existing Building Commissioning | Foundational | 91 | 59 | 0 | 16 | 27% | 27% |
| "The 7 Steps" – A Practical Methodology for Energy Management | Building Performance Series (BOMA) | Specialized Support | 11 | 9 | 1 | 3 | 44% | 34% |
| Performance Analysis – How well do you know your building(s)? | Building Performance Series (BOMA) | Specialized Support | 14 | 10 | 0 | 0 | 0% | 0% |
| Existing Building Commissioning (EBCx) – Tune up & Save | Building Performance Series (BOMA) | Specialized Support | 43 | 29 | 0 | 8 | 28% | 28% |
| Developing a Retrofit Strategy for Your Building(s) – Your roadmap to big savings | Building Performance Series (BOMA) | Specialized Support | 61 | 44 | 3 | 8 | 25% | 18% |
| Renewable & Low-Carbon Energy – Economical Approaches to Addressing Energy Supply | Building Performance Series (BOMA) | Specialized Support | 56 | 40 | 0 | 4 | 10% | 10% |
| Total | | | 735 | 530 | 21 | 91 | 21% | 17% |

Source: EcoMetric analysis

3.1.1 RESPONDENTS

EcoMetric asked respondents to describe the roles that they fill at work regarding energy, offering them seven roles and the ability to add another role. Multiple selections were permitted, and responses ranged from one to six roles per respondent.

For the purpose of this analysis, EcoMetric grouped respondents by the identified role with the highest responsibility, as presented in Table 4. No respondent identified "personal interest unrelated to their job or profession."

Table 4: Groups of Respondent Roles at Work Regarding Energy

| Role at Work Regarding Energy | Group |
|---|-------|
| Sign contracts or approve funding for energy-efficiency or conservation projects | 1 |
| Recommend or approve energy-efficiency or conservation projects | 1 |
| Develop or manage energy-efficiency or conservation projects | 2 |
| Hire, supervise, or work with contractor(s) on energy-efficiency or conservation projects | 2 |
| Support or assist with energy-efficiency or conservation projects | 3 |
| Analyze impacts of energy-efficiency or conservation projects | 3 |
| Personal interest not related to my job or profession | 4 |

Source: EcoMetric analysis

Most respondent roles include the top group, with variation across CBI categories (Figure 2). Specifically, 13 respondent roles include signing contracts or approving funding for energy efficiency or conservation projects and 56 respondent roles include recommending or approving energy efficiency or conservation projects.





Source: EcoMetric analysis

CBI participants in our sample often attended multiple Initiatives, with 23% attending two and 2% attending five (Figure 3).

Figure 3: Percentage of Participants in Sample Who Attended Multiple CBIs



Source: EcoMetric analysis

EcoMetric analyzed the length of time participants spent in the hour-long webinars. Our sample for this section of the research consisted of the full raw sample, capturing the time that participants – not limited to survey respondents – were in attendance (Figure 4).

The sweet spot for the hour-long webinar would be 55 to 65 minutes. Those who spent less than five minutes were not full attendees. Those spending up to 40 minutes may have lost interest or had a schedule conflict. Those spending more than 75 minutes may have lost track of the webinar behind other work on their computers.



Figure 4 Time (Minutes) Participants Attended Hour-Long Webinars

Source: EcoMetric analysis Sample consists of webinar participants, not survey respondents.

3.1.2 AWARENESS

More respondents (49%) became aware of their CBI Initiative from the Save on Energy website, an increase of 12% over PY2022. Twenty six percent of respondents learned about this CBI through attendance at a prior CBI, a 100% increase over PY2022. A portion of respondents (12%) learned of the CBI through their manager, energy manager, or other leader at work (Figure 5), a decrease of 14% over PY2022.



Figure 5: How Respondents Became Aware of CBI Opportunity, n=86

Source: EcoMetric analysis

Regardless of how respondents first became aware of the CBI, the vast majority (90%) prefer to learn of future CBI opportunities by email. Other respondents would prefer to learn about opportunities on the Save on Energy website (5%) or through LinkedIn (5%).

Most respondents (85%) were aware of Save on Energy programs and incentives in general. They were aware of programs by name, with most able to identify multiple programs (Figure 6). A minority (14%) were unsure of program names. A majority (64%) recognized Existing Building Commissioning and Retrofit (Figure 6). The fewest respondents (40%) were aware of the Small Business program.



Figure 6: Awareness of Save on Energy Programs Prior to CBI

Source: EcoMetric analysis

3.1.3 MOTIVATION TO PARTICIPATE IN TRAINING

Respondents were motivated by multiple reasons to allocate their time to a CBI, with at least half saying that the CBI supported their job function. Motivations differed significantly by CBI, as shown in Figure 7. Respondents reported being motivated by all eight factors in six of the CBI categories.

Respondents from Economical Approaches to Energy Supply were not motivated to understand energy use; respondents from ISO 50001 were not motivated to understand energy use, projects, or use the information to manage or train staff. Respondents from Energy Analysis for School Boards were motivated either to support their job function or for personal interest.



Figure 7: Motivation to Invest Time in CBI

Source: EcoMetric analysis

3.1.4 SATISFACTION

Respondents were satisfied with their CBI, rating their overall satisfaction with the CBI experience at a mean of 7.9 on a 0-10 scale¹.

EcoMetric asked about satisfaction in five general areas:

- > presentation content and quality of instructors,
- suitability to experience and what they learned,
- clear takeaways to use and share at work,
- > next steps to learn more and to implement what was learned, and
- their overall experience.

Satisfaction ratings varied by question and CBI category and are therefore offered separately in the following figures. The EBCx, EBCx Tune Up and Save, and Economical Approaches to Energy Supply consistently offered more moderate satisfaction than the other CBI categories. Respondent comments expressing satisfaction and offering potential improvements are included throughout this section.

Overall satisfaction with the CBI experience is offered in Figure 8. Respondents expressed satisfaction with their CBIs, including:

¹ All satisfaction ratings were based on a zero to ten scale, where zero meant "not at all satisfied" and ten meant "extremely satisfied."

- "Keep these presentations coming. They are very helpful."
- "We achieved 14,694 MWh annualized electricity savings."



Figure 8: Satisfaction with Overall CBI Experience

Source: EcoMetric analysis

Respondents from the two Commissioning CBI categories reported lower satisfaction with suitability of the CBI to their experience level, with half of EBCx Tune UP & Save and 21% of EBCx rating it at a four to six (Figure 9).

Figure 9: Satisfaction with Suitability of CBI to Respondent's Experience Level with Topic



Source: EcoMetric analysis

Respondents are satisfied and highly satisfied with the content delivered in their CBI. EBCx Tune Up & Save and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 10).

Respondents commented on the content presented in their CBI, including:

"Great work! Enjoy your content and have always found it useful."

Respondents requested practical examples during the CBIs, commenting:

- "As many practical examples as possible are always best."
- "Present more real project examples and challenges, as well as post implementation results both good and bad."

A respondent requested that the material be offered in a larger font to improve readability:

• *"I find the content in the webinars to be a bit small and can be difficult to read. I streamed it to a TV and it was still a bit tough."*



Figure 10: Satisfaction with Content Delivered in Presentation

Source: EcoMetric analysis

Respondents are generally satisfied with the quality of instructors for their CBI, commenting:

• "You provide very high quality and informative training with top tier professionals."

Respondents are satisfied and highly satisfied with the quality of instructors from their CBI. EBCx Tune Up & Save and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 11).



Figure 11: Satisfaction with Quality of Instructors

Source: EcoMetric analysis

Respondents are satisfied and highly satisfied with the clear takeaways from their CBI to use at work. EBCx Tune Up & Save and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 12).

Respondents complimented the accessibility of complex topics in their CBI, commenting:

"Excellent job translating complex concepts into simpler and practical terms and applications, I
hope that you expand this training to more areas (e.g. learning about municipal green
building standards and how different options for efficiency gains can match these various
standards)."

Respondents are satisfied with their ability to apply what they learned in the CBIs, commenting:

• "Good education program with real world applications."



Figure 12: Satisfaction with Clear Takeaways to Use at Work

Source: EcoMetric analysis

Respondents are satisfied with the clear materials offered in their CBI to share at work. A minority of EBCx participants expressed dissatisfaction, and Energy Data, EBCx Tune Up & Save, and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 13).

Respondents requested additional technical information from their CBI, commenting:

• *"Provide a bit more technical information."*

Figure 13: Satisfaction with Clear Materials to Share at Work



Source: EcoMetric analysis

Respondents are satisfied and highly satisfied with the next steps to learn more offered in their CBI. A minority of EBCx participants expressed dissatisfaction, and Energy Data, EBCx Tune Up & Save, and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 14).

Figure 14: Satisfaction with Next Steps to Learn More



Source: EcoMetric analysis

Respondents are satisfied and highly satisfied with the next steps to implement what they learned in their CBI. EBCx, Energy Data, EBCx Tune Up & Save, and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 15).

Respondents requested information about demand side management, including direct links to Save on Energy programs, from their CBI, commenting:

"Link training to DSM incentives."



Figure 15: Satisfaction with Next Steps to Implement What Was Learned

Source: EcoMetric analysis

Respondents are satisfied and highly satisfied with what they learned about the general topic of their CBI. EBCx, EBCx Tune Up & Save, and Economical Approaches to Energy Supply reported moderate satisfaction (Figure 16).

Respondents offer general praise for the CBIs, commenting:

• "Thanks again, hope to hear about a new training from y'all soon!"





Source: EcoMetric analysis

3.1.5 CHANGE IN FAMILIARITY AND KNOWLEDGE FOLLOWING TRAINING

The core of CBI initiatives is to educate participants on various topics within the subjects addressed by the CBI. EcoMetric evaluated Key Components and Evaluation Recommendations offered in the Capability Building Summary Report 2023 and the Capability Building Plan 2023-2024 to develop a list of topics addressed in the CBIs and used this list to ask respondents to identify the topic they were most interested in learning about when they registered for the CBI. All respondents had an opportunity to offer their own topic they most wanted to learn about, though none did.

EcoMetric asked respondents to rate their knowledge about their identified topic before the training and later asked them to rate their knowledge about their same topic after the CBI.

A significant majority of respondents across all categories reported a gain in knowledge from the CBI, as shown in Figure 17. The span of reported differences in knowledge about a specific, self-identified topic was broad, running from negative three to positive ten. Some reported no change in knowledge and a handful reported reduction in knowledge in Energy Data and EBCx.

A perceived reduction in knowledge is a common phase in education when assumptions about a topic and level of knowledge is challenged by the presentation of information. This phenomenon of reporting that respondents know less about a subject after learning more about it reflects a cognitive bias known as the Dunning-Kruger effect. A perceived reduction in knowledge reflects an overestimation of knowledge prior to learning more about the topic.

Figure 17: Change in Reported Knowledge About Chosen Topic, Before and After CBI



Source: EcoMetric analysis

EcoMetric asked about familiarity with a subject before and after the CBI. Using "The Road to Implementing ISO 50001" as an example, the subject would have been broadly "ISO 50001" while the topic may have been specifically "Benefits and Suitability of ISO 50001 Certification."

The span of reported differences in familiarity about a general subject was narrower than for knowledge about a specific topic, running from negative three to positive four. This indicates a broad improvement of familiarity on the high end and a similar rejection of prior overestimations of familiarity on the low end.

EcoMetric would expect the maximum increase in familiarity to be lower than the specific increase in knowledge about a self-identified topic. The preponderance of categories with negative changes in familiarity indicates that the CBIs are replacing overestimations of familiarity with new knowledge (Figure 18).

Figure 18: Change in Reported Familiarity About General Subject, Before and After CBI



Source: EcoMetric analysis

3.1.6 INFLUENCE ON ENERGY EFFICIENCY AND CONSERVATION PROJECTS

Most respondents (67%) report that they have been able to put the knowledge gained from their CBI to use at work, though the rate differs by category (Figure 19). Respondents report a variety of ways that they have put this new knowledge to work, including schedule changes, data use, and expanding engagement, commenting:

- "I found opportunities to optimize operations and improve energy efficiency based on the current need of our facility. For example, one of our [facilities] was converted to a storage location. Therefore, the BAS setting was updated based on the facility use." EBCx3 participant.
- "We have implemented site walk through by our Sustainability team." PMEM participant.
- "Analyzing energy data to plan climate action (mitigation and adaptation)." Energy Data participant.
- "I provided feedback to my team who will make changes." EBCx3 participant.
- *"We are applying what we have learned into our E-MAP." RSB participant.*

Figure 19: Has Respondent Put Knowledge from CBI to Use at Work



Source: EcoMetric analysis

Respondents reporting that they have not had the opportunity to use their new knowledge at work offered explanations, including lack of time and competing demands, commenting:

- "Limited scopes of work and task assignment." EBCx3 participant.
- "Waiting for a suitable EBCx project." EBCx participant.
- *"We are not pursuing ISO 50001 at this time." ISO 50001 participant.*
- "I only support another manager." EBCx3 participant.
- "Too Busy with other work requirements." Energy Data participant.
- *"limitation of current job workload." EBCx participant.*
- *"A few projects were stalled and the ones that were commissioned we hired third party contractors and consultants to commission." EBCx participant.*

EcoMetric asked respondents if their participation in the CBI lead directly to their company deciding to participate in a Save on Energy program. Overall, 23% of respondents said that their participation lead directly to participation and 39% said that they have not yet but are planning to. There is considerable variation by category, as shown in Figure 20.

EcoMetric asked what prevented respondents from participating in a Save on Energy program. Explanations often reference a respondent's role as consultant or ESP. These people would be unlikely to implement their own projects, but their increased knowledge will benefit their clients. Comments include:

- "[We are] not [based] in Ontario." Energy Data participant.
- *"My familiarity with SaveOnEnergy programs is for external stakeholders." EAES participant.*
- "[The CBI was part of a] mandatory Cx Professional Certification." EBCx participant.
- "We are consultants." EBCx participant.
- "We have participated but it wasn't as a direct result of the seminar." EBCx participant.



Figure 20: Did CBI Lead Directly to Participation in Any Save on Energy Projects

Source: EcoMetric analysis

Respondents reported moderate CBI influence on their decision to participate in a Save on Energy program (mean of 6.5) or to implement a project outside Save on Energy (mean of 6.5). Influence on planning a project within or outside Save on Energy is slightly higher (mean of 6.8), but the implementation of planned projects is unreliable (Figure 21).

Figure 21: Influence of CBI on Implementing Energy Efficiency or Conservation Projects



Source: EcoMetric analysis

Respondents offered some descriptions of the projects implemented or planned, but not with sufficient detail to estimate savings or impacts.

Respondent describe general demand side management projects implemented through Save on Energy, commenting:

- "We are currently implementing an internal demand response program to tackle the upcoming cooling peak demands."
- "These projects collectively aim to reduce energy consumption, lower operational costs, and contribute to sustainability goals. Each project was carefully planned and executed to ensure maximum impact and long-term benefits."

Respondent descriptions of projects implemented outside Save on Energy include scheduling, electrification, commissioning and general demand side management projects, commenting:

- "We updated the operating hours and load of our HVAC and lighting systems as there is now less occupant demand in the building due to the change in facility use."
- *"For instance, boiler replacements (gas to electric) or heat recovery chiller installation. All commercial class A office buildings."*
- "Introduce "Special Event" mode in the BAS systems to operate [facilities] that use HVAC systems after hours using permits for [specific] activities."
- "We will be taking a more structured approach to building recommissioning based on some of the topics learned during the presentation. We are also go going to expand the scope to include additional commissioning measures."
- "We have been applying knowledge gained from the webinar in identifying energy efficiency and management measures within our existing building stock. We started with 'quicker ROI' projects to make the case to leadership and Council, such as LED lighting upgrades, building

automation systems, and envelope improvements in several facilities. In this year's multi-year budget, we have identified line items to transform building heating and cooling components to be electric or hybrid replacements for end of life gas powered furnaces. Since this comes at significant costs, we are seeking funding support from the province as well as federal programs."

The project types, status, and counts that were influenced by CBI participation are listed in Table 5.

| Project Type | Implemented through Save on Energy (reported counts) | Implemented without Save on Energy (reported counts) | Planned (reported counts) |
|---|--|---|---------------------------------|
| EBCx | 1 | | 4 |
| Lighting | 2 | 3 | |
| Behavioural/Scheduling Changes | 1 | 2 | 1 |
| Boilers | | 2 | |
| Envelope | | 1 | 1 |
| HVAC | | 1 | 1 |
| Pumps | | 1 | 1 |
| Added staff role to monitor energy use | | 1 | |
| Air curtains | | | 1 |
| ASHPs | 1 | | |
| Demand Response | 1 | | |
| Electrification | | | 1 |
| Enbridge P4P | | 1 | |
| Heat Economizers for Commercial ovens | | 1 | |
| Heat recovery chillers | | 1 | |
| Motors | | | 1 |
| Sharing real-time energy data with students | | 1 | |
| Smart Thermostats | | 1 | |
| VSDs on cooling towers | | 1 | |

Table 5: Implemented and Planned Project Types Influenced by CBI Participation

Source: EcoMetric analysis

3.1.7 PERCEIVED VALUE

EcoMetric asked respondents if they experienced non-energy benefits (NEBs) and to place a value on the benefits. A minority of respondents attempted to quantify the value to their companies of the benefits, but there were too few to contribute to this analysis.

Most respondents (65%) did not report experiencing any NEBs. As shown in Figure 22, the most common NEB reported was a reduction in operations and maintenance time and costs (24%), improved thermal comfort (16%), and improved indoor air quality (6%).





Source: EcoMetric analysis

Most respondents (66%) reporting NEBs reported experiencing one type of NEB. A minority of respondents reported experiencing two (27%) or three (7%) types of NEBs.

3.1.8 REQUESTS FOR PROGRAM IMPROVEMENT OR EXPANSION

Respondents offered various requests for program improvement that focused on additional topics, customer segments and services.

Requests associated with new CBI topics focused on electric vehicles, specific topics (ASHRAE 241 and Industrial Energy Management and Audits) and more data training, commenting:

- "More training about data clean up and management from all data sources (e.g. meters, BAS, others)."
- "Trend on EV; electrification and the grid capacity."
- "Discuss the implementation of ASHRAE 241 2023 in recommissioning strategies."
- "Looking for sessions on Industrial Energy Management and Audits."

A respondent requested more CBIs focused on small municipalities, commenting:

• "Provide more information about financial incentives for small municipalities."

Respondents asked for options to receive personal support and advice, commenting:

"Personal follow-up to meet and audit buildings would be helpful."

A respondent requested a planning template to ease energy management issues, commenting:

• "Province should have online CDM Plan template that includes easy to fill in boxes that include all aspects of an energy management including EBCx."

EcoMetric performed a value of money assessment, in-lieu of a traditional cost-to-benefit ratio calculation, as energy savings are not estimated for the CBI program, and the costs of projects enabled by CBI are absorbed by other Save on Energy Programs. Project-level budget data was provided by the IESO, and for purposes of this analysis, it is assumed that spending is equal to budget.²

4.1 KEY METRICS

4

Table 6 includes key metrics on budget/spending for Capability Building Initiatives.

| ltem | Metric | CBI |
|------|--|--------------|
| 1 | Overall spending PY23 | \$126,875.00 |
| 2 | Spending per participant (698 attendees, 14 analyzed CBIs) | \$162.07 |
| 3 | Spending per Initiative (21) | \$6,041.67 |
| 4 | Spending per Initiative (webinars only) (10) | \$10,940.00 |
| 5 | Spending per Save on Energy project by any attendee (161) | \$790.30 |
| 6 | Spending per Save on Energy project by CBI-influenced attendee (78) | \$1,626.36 |
| 7 | Spending per project outside Save on Energy by any attendee (227) | \$558.29 |
| 8 | Spending per project outside Save on Energy by CBI-influenced attendee (131) | \$965.65 |

| Table | 6: | Kev | Value | for | Monev | Metrics |
|-------|----|-------------|-------|-------|-------|---------|
| | | · · · · · · | | J - · | | |

EcoMetric applied the rate of respondents who reported implementing a project through a Save on Energy program, as shown in Figure 20, to the full CBI population to estimate the number of participants implementing projects through a Save on Energy Program shown in Item 5 of Table 6 as 161.

EcoMetric found that half of the respondents rated the influence of their attendance at a CBI higher than a six on their decision to implement a project through Save on Energy (Figure 21). Applying those influenced by CBI to those implementing projects, we estimate that 11% were influenced to

² Workbook titled "Capability Building Initiatives Summary," provided to EcoMetric by the IESO on 2024/7/12.

implement a project through a Save on Energy program. Applying this rate to the full CBI population, 78 Initiative attendees were likely influenced by their CBI to implement a project through Save on Energy (Item 6 of Table 6).

EcoMetric applied similar calculations to determine the spending per project outside Save on Energy programs as Items 7 and 8 in Table 6, based on 33% of respondents implementing a project outside Save on Energy, 57% of whom rated the influence of their CBI attendance over a 6 on the decision to implement the project.

Total budget across CBI Initiatives during PY2023 was \$126,875.00. The percent spending by service provider was:

- Canadian Institute of Energy Training (CIET), 83%
- Building Owners and Managers Association (BOMA), 10%
- Coaching Initiatives, 4%
- IESO, 3%

The average cost per Initiative during PY2023 was \$6,041.67. The "Road to Implementing ISO 50001" Initiative was the most expensive project at a cost of \$35,000. The average cost per initiative during PY2023 excluding "Road to Implementing ISO 50001" was \$4,593.75

Table 7 includes participation and program spending by Initiative, alongside spending per participant, for Initiatives where participant data was available. Budget for the Initiatives where participation data was tracked (projects 1-14 in As shown in Table 7, average spending per participant in PY2023 was \$162.07. Cost per participant ranged from \$28.33 (Project #9, \$850 with 30 participants) to \$603.45 (Project #4, the Road to Implementing ISO 50001 Initiative, \$35,000 with 58 participants). In PY2022, the School Board Coaching initiative was the most expensive, with a cost above \$15,000 and 14 participants. When only webinars are included and the ISO 50001Initiative is omitted, the average cost per attendee is \$135.85, and \$139.32 for those who remained in the webinar more than five minutes.

Table 7), totaling \$113,125.00 accounted for 89% of the total CBI budget during PY2023 (\$126,875.00).

As shown in Table 7, average spending per participant in PY2023 was \$162.07. Cost per participant ranged from \$28.33 (Project #9, \$850 with 30 participants) to \$603.45 (Project #4, the Road to Implementing ISO 50001 Initiative, \$35,000 with 58 participants). In PY2022, the School Board Coaching initiative was the most expensive, with a cost above \$15,000 and 14 participants. When only webinars are included and the ISO 50001Initiative is omitted, the average cost per attendee is \$135.85, and \$139.32 for those who remained in the webinar more than five minutes.

Table 7: Spending by Initiative

| Project # | Initiative | Attendees | Attendees in Webinar >5 minutes | Spending | Spend per Attendee | Spend per Attendee in Webinar >5 minutes |
|-----------|---|-----------|---------------------------------------|-------------|-----------------------|---|
| 1 | Introduction to M&V | 69 | 68 | \$3,000.00 | \$43.48 | \$44.37 |
| 2 | Energy Management and Efficient Electrification Series: Municipalities – Energy Management Best Practices for Organizations | 31 | 30 | \$6,200.00 | \$200.00 | \$204.08 |
| 3 | Estimating Project Savings – Pumps & Fans | 75 | 74 | \$19,000.00 | \$253.33 | \$258.50 |
| 4 | The Road to Implementing ISO 50001 | 58 | 58 | \$35,000.00 | \$603.45 | \$603.45 |
| 5 | Creating Value from Your Building Energy Data | 66 | 65 | \$3,500.00 | \$53.03 | \$54.11 |
| 6 | Existing Building Commissioning in a Nutshell | 91 | 87 | \$12,500.00 | \$137.36 | \$143.09 |
| 7 | Existing Building Commissioning Savings Opportunities | 50 | NA | \$14,500.00 | \$290.00 | \$290.00 |
| 8 | Energy Management and Efficient Electrification Series: Energy Management Practices and Save on Energy Resources for Ontario Municipalities | 39 | 38 | \$6,200.00 | \$158.97 | \$162.22 |
| 9 | Coaching: Energy Data Analysis for School Boards | 30 | NA | \$850.00 | \$28.33 | \$28.33 |
| 10 | "The 7 Steps" – A Practical Methodology for Energy Management | 11 | NA | \$2,475.00 | \$225.00 | NA |
| 11 | Performance Analysis – How well do you know your building(s)? | 14 | NA | \$2,475.00 | \$176.79 | NA |
| 12 | Existing Building Commissioning (EBCx) – Tune up & Save | 43 | NA | \$2,475.00 | \$57.56 | NA |
| 13 | Developing a Retrofit Strategy for Your Building(s) – Your roadmap to big savings | 61 | NA | \$2,475.00 | \$40.57 | NA |
| 14 | Renewable & Low-Carbon Energy – Economical Approaches to Addressing Energy Supply | 60 | NA | \$2,475.00 | \$41.25 | NA |
| | Total (participant data available) | 698 | 420 | \$113,125 | \$162.07 | \$277.30 |

Participant data was provided for the Initiatives included in Table 7.

Table 8 includes budget information for another eight Initiatives where participant data was unavailable.

Table 8: Spending by Initiative (no participant data available)

| Project # | Initiative | Spending |
|--------------|---|------------|
| 15 | Webinar: Energy Star Portfolio Manager 101, 201, 301 | NA |
| 16 | Webinar: EM as a Framework to Achieve GHG Goals | \$5,000.00 |
| 17 | Webinar: Why you need to consider energy efficiency in your GHG reduction plans | \$4,500.00 |
| | Total (no participant data available) | \$9,500.00 |

Figure 23 shows the budget, participation and relative spending per participant for the Initiatives with participant information. The ISO 50001Initiative (#4) stands out with its high overall and per-participant cost.



Figure 23: Spending and Participation by Initiative Larger bubble size = Higher spending per participant



Figure 23:

- 1. Introduction to M&V
- 2. Energy Management and Efficient Electrification Series: Municipalities Energy Management Best Practices for Organizations
- 3. Estimating Project Savings Pumps & Fans
- 4. The Road to Implementing ISO 50001
- 5. Creating Value from Your Building Energy Data
- 6. Existing Building Commissioning in a Nutshell
- 7. Existing Building Commissioning Savings Opportunities
- 8. Energy Management and Efficient Electrification Series: Energy Management Practices and Save on Energy Resources for Ontario Municipalities
- 9. Coaching: Energy Data Analysis for School Boards 1
- 10. "The 7 Steps" A Practical Methodology for Energy Management
- 11. Performance Analysis How well do you know your building(s)?
- 12. Existing Building Commissioning (EBCx) Tune up & Save
- 13. Developing a Retrofit Strategy for Your Building(s) Your roadmap to big savings
- 14. Renewable & Low-Carbon Energy Economical Approaches to Addressing Energy Supply

Finding 1: Respondents are satisfied with their CBI, rating their overall satisfaction at a mean of 7.9. Satisfaction varied by program element from an overall high mean rating of 8.1 for the quality of instructors to a low mean of 7.3 for clear next steps to implement what they learned. Satisfaction also varied by CBI category. Reduced satisfaction with the suitability of the CBI for respondent's level of experience with the topic carried through to most other areas of satisfaction. Specifically, those rating the suitability of the training to their experience level at a six or lower rated their overall satisfaction with the CBI at a mean of 5.9, satisfaction with the content offered in the CBI at a mean of 5.3, and satisfaction with what they learned at a mean of 5.7.

Recommendation 1: Consider offering additional information in CBI promotional materials to guide prospective participants to the most appropriate level of training for their needs. Provide a list of all CBIs associated with a subject, the experience level they address, and a description of content.

Finding 2a: Most (85%) respondents were aware of Save on Energy programs and incentives prior to their participation. A majority (64%) identified Retrofit, and Existing Building Commissioning as programs they were aware of. Respondents reporting that their CBI lead directly to implementing a Save on Energy project (89%) were better able to identify a program (68%, an increase of 4%).

Finding 2b: Influence of the training on the decision to implement a project through Save on Energy was similar among those who could identify a program (mean influence of 6.6) compared to those who could not identify a program prior to their CBI (6.5).

Recommendation 2: Consider offering materials at the training to promote the portfolio of Save on Energy programs. Succinct materials featuring benefits of participation (incentives, technical assistance, application or project support) will help to improve awareness of the programs, and with it the influence that the initiatives have on planning future projects.

Finding 3: A significant majority (86%) of respondents reported an increase in their knowledge following participation. A majority (63%) also reported greater familiarity with the general subject of their training. Some respondents reported a cognitive bias known as the Dunning-Kruger effect, or an overestimation of knowledge prior to participating in the training. It is a positive finding that respondents replaced overestimations of prior knowledge with new, accurate information. The Dunning-Kruger effect was observed among respondents with titles "energy engineer" and "property manager" and other roles that included developing, recommending and assisting with energy efficiency and conservation projects. One respondent stated that he is "Looking for sessions on Industrial Energy Management and Audits," indicating a desire to learn more.



Another respondent requested that CBI "presents more real project examples and challenges, as well as post implementation results both good and bad," indicating a desire to learn more about the subject.

Recommendation 3: Consider promoting CBIs with related Save on Energy programs, particularly in areas where the Dunning-Kruger effect was reported by more than 10% of respondents, including the categories of ISO 50001, Retrofit Strategy, EBCx Tune Up and Save, EBCx, and "The 7 Steps" for Energy Management.

Finding 4: Most respondents (67%) report they have put the knowledge gained from their participation to use at work. For example, one respondent said that they are working on a Strategic Energy Management project while another respondent said that they are educating upper management on the benefit of Save on Energy programs. Only 22% of the respondents reported that their CBI participation led directly to participation in a Save on Energy program. Reasons for not participating included waiting for internal annual capital planning sessions or waiting for the appropriate project opportunity to apply the knowledge they have gained.

Finding 5: CBI attendance had a moderate influence on the decision to implement an energy efficiency or conservation project, inside (mean of 6.5) or outside (mean of 6.5) a Save on Energy program. Some respondents requested additional information on Save on Energy programs and incentives, including more information about financial incentives for small municipalities. Other respondents requested information often presented in case studies, such as examples of real-world projects or challenges faced by different types of businesses.

Recommendation 5: Consider offering additional materials at initiatives that can create a direct, and simple path to participation in Save on Energy programs. A case study leveraging material covered in the training, real world project examples and additional information on program benefits may increase influence to participate and help to develop a business case for projects implemented through Save on Energy.

Finding 6: Some respondents (35%) reported having experienced non-energy benefits. The most common non-energy benefit reported was Operations & Maintenance benefits (24%), followed by improved thermal comfort (16%). Of those experiencing NEBs, 34% report experiencing two or more NEBs. Only a few respondents were able to place a value on the NEB, with one reporting that it is difficult to place a value on thermal comfort.

Recommendation 6: Consider including CBI participants in future NEBs studies with structured questioning on the quantification of non-energy impacts. Educate participants during the initiative about recognizing and valuing NEBs.

Finding 7: Existing participant data is insufficient to track channeling to Save on Energy programs or quantify potential spillover.

Recommendation 7: Consider collecting company data to allow analysis of channeling and spillover. This data could be supplied by adding fields for facility address and number of company facilities in Ontario to the CBI registration process.

Appendix 1

A.1 Participant Survey

This memo presents a survey instrument for the evaluation of the IESO's Save on Energy Capability Building Initiatives (CBIs) in Program Year (PY) 2023. The IESO's CBIs provide participants with training webinars and other online educational resources to increase energy-efficiency knowledge and lead participants to the incentives and support available through the IESO's broader portfolio of Conservation and Demand Management (CDM) programs.

EcoMetric will conduct a holistic assessment of the enabling impacts of the initiatives on the IESO's portfolio of CDM programs. Specifically, EcoMetric will seek to assess and determine how the CBIs influence participation across the IESO's programs as well as measure the participants' perceived value of the CBIs. Evaluation activities will consist of surveying participants between 6-12 months after their participation and linking the CBI participation to participation in the IESO's CDM programs.

A.1.1.1 Survey Details

This survey will be conducted online through Typeform. EcoMetric will use the emails drafted below to recruit CBI participants with contact information from the following webinars completed in 2023:

- Introduction to Save on Energy/Best Practices for Public Sector
- Introduction to Measurement & Verification
- Creating Value from Building Energy Data
- Road to Implementing ISO 50001
- Estimating Project Savings: Pumps & Fans
- EBCx in a Nutshell
- EBCx Savings Opportunities
- Energy Analysis Coaching for School Boards
- "The 7 Steps" A Practical Methodology for Energy Management
- Performance Analysis How well do you know your building(s)?
- Existing Building Commissioning (EBCx) Tune up & Save
- Developing a Retrofit Strategy for Your Building(s) Your roadmap to big savings
- Renewable & Low-Carbon Energy Economical approaches to addressing energy supply

Table 9: Research Objective Mapping

| Research Objective | Respondent | Questions |
|---|------------|------------|
| Screening questions: Who are we surveying? | All | SC1 – SC3 |
| Awareness: Effectiveness of delivery channels and marketing strategies? | All | AW1 – AW7 |
| Motivation: Why participate in the webinar? | All | M1 – M5 |
| Impact and Influence: Impact and influence of CBI participation on energy-efficiency projects | All | IN1 – IN15 |
| Perceived value of Initiatives | All | PV1 - PV3 |
| Satisfaction: participant satisfaction with webinar | All | SAT1 |
| Recommendations: recommendations to improve CBI | All | R1 |
| Firmographics: Understand participants' facilities | All | F1 – F4 |

A.1.1.2 Recruitment Emails

- Recruitment email
- Reminder emails

A.1.1.3 Initial Email

From: evaluations@ieso.ca

To: <email>

Subject: Receive a \$10 gift card when you complete our Save on Energy feedback survey

Email body:

<first_name>,

Save on Energy would like your feedback.

We hope Save on Energy's <training_name> <format> was helpful for you. Your input is important to us, and we would greatly appreciate your feedback on the session. It will help us improve Save on Energy's free training programs offered to professionals across Ontario.

- **It's quick.** This survey takes less than 10 minutes on average to complete.
- It's confidential. All the information you provide will remain confidential. It will be anonymized and used in aggregate.
- \$10 for your time! We value your time and will email you a VISA e-gift card once you complete the survey.*

Start the survey

If you have any questions about this survey, please contact us at <u>saveonenergy@ieso.ca</u>.

Thank you for your interest and support in advancing energy efficiency in Ontario.

The Save on Energy Team

<IESO logo/Save on Energy logo/EcoMetric logo>

*Surveys must be completed within 10 days of this email. The VISA e-gift cards will be managed by our survey partner, EcoMetric, and will be emailed from admin@hawkmarketplace.com within four weeks.

A.1.1.4 First Reminder

From: evaluations@ieso.ca

To: <email>

Subject: Reminder: Receive a \$10 gift card when you complete our Save on Energy feedback survey

Email body:

<first_name>,

Save on Energy would like your feedback.

We hope Save on Energy's <training_name> <format> was helpful for you.

We recently invited you to complete a short survey. Your input is important to us, and we would greatly appreciate your feedback.

- **It's quick**. This survey takes less than 10 minutes on average to complete.
- **It's important.** The information you share will help improve Save on Energy's energy-efficiency training across Ontario.
- It's confidential. All the information you provide will remain confidential. It will be anonymized and used in aggregate.
- \$10 for your time! We value your time and will email you a VISA e-gift card once you complete the survey.*

<u>Start the survey</u>

If you have any questions about this survey, please contact us at <u>saveonenergy@ieso.ca</u>. Thank you for your interest and support in advancing energy efficiency in Ontario. Save on Energy Team <IESO logo/Save on Energy logo/EcoMetric logo>

*Surveys must be completed within three days of this email. The VISA e-gift cards will be managed by our survey partner, EcoMetric, and will be emailed from <u>admin@hawkmarketplace.com</u>.

A.1.1.5 Final Reminder

From: evaluations@ieso.ca

To: <email>

Subject: Last chance to receive a \$10 gift card when you complete our Save on Energy feedback survey

Email body:

<first_name>,

Save on Energy would like your feedback.

We hope Save on Energy's <training_name> <format> was helpful for you.

Your input is important to us, and we would greatly appreciate your feedback. Time is running out!

- **It's quick**. This survey takes less than 10 minutes on average to complete.
- It's important. The information you share will help improve Save on Energy's energyefficiency training across Ontario.
- **It's confidential**. All the information you provide will remain confidential. It will be anonymized and used in aggregate.
- \$10 for your time! We value your time and will email you a VISA e-gift card once you complete the survey.*

Start the survey

If you have any questions about this survey, please contact us at <u>saveonenergy@ieso.ca</u>. Thank you for your interest and support in advancing energy efficiency in Ontario. Save on Energy Team

<IESO logo/Save on Energy logo/EcoMetric logo>

*Surveys must be completed within two days of this email. The VISA e-gift cards will be managed by our survey partner, EcoMetric, and will be emailed from <u>admin@hawkmarketplace.com</u>.

A.2 Survey Questions

A.2.1 Landing Page

Welcome, <*first_name*>! Thank you for taking this important survey about your <*format*>.

- **It's quick.** This survey takes less than 10 minutes on average to complete.
- **It's important.** The information you share will help improve Save on Energy's energy-efficiency training across Ontario.
- It's confidential. All the information you provide will remain confidential. It will be anonymized and used in aggregate.
- \$10 for your time! We value your time and will email you a VISA e-gift card once you complete the survey.

This survey is about your experience attending the *<measure_name> <format>* in in the past year.

A.2.2 Screening

[INCLUDE PROGRESS BAR]

SC1. Our records show that you participated in the *<measure_name*> *<format*> in the past year. Does that sound right?

- 1. Yes [CONTINUE WITH SURVEY]
- 2. No [SKIP TO CLOSING]
- 98. I don't know [SKIP TO CLOSING]
- SC2 What is your title at <organization>?
 - 1. Asset Manager
 - 2. Energy Engineer
 - 3. Energy Manager
 - 4. Energy Services Provider
 - 5. Facilities Manager
 - 6. Board of Director or Home Owner Association
 - 7. Project Manager

- 8. Property Manager
- 9. Other Commercial/Vendor

10. Other, please name [OPEN END]

SC3 What is your role at *<organization>* regarding energy? Select all that apply. [ACCEPT MULTIPLE SELECTIONS]

- 1. Sign contracts or approve funding for energy-efficiency or conservation projects
- 2. Recommend or approve energy-efficiency or conservation projects
- 3. Develop or manage energy-efficiency or conservation projects
- 4. Hire, supervise, or work with contractor(s) on energy-efficiency or conservation projects
- 5. Support or assist with energy-efficiency or conservation projects
- 6. Analyze impacts of energy-efficiency or conservation projects
- 7. Personal interest not related to my job or profession
- 8. Other, please explain [OPEN END]

A.2.3 Awareness

Determine the effectiveness of delivery channels and marketing strategies

- AW1 How did you first hear about the <<u>measure_name</u>> <<u>format</u>>? [ONE OPTION]
 - 1. Save on Energy website
 - 2. Prior experience with Save on Energy training
 - 3. My manager, another leader, or my company's energy manager
 - 4. An energy service provider, contractor, vendor, or engineering firm
 - 5. Word of mouth
 - 6. Social media
 - 97. Other, please explain [OPEN END]

AW2 What is the best way to let you know about future training and Save on Energy opportunities? [ONE OPTION]

- 1. Email
- 2. Save on Energy website
- 3. LinkedIn
- 4. Program marketing material and ads
- 97. Other, please explain: [OPEN END]

AW3 Were you aware of the Save on Energy energy-efficiency programs and incentives for business before this <format>?

- 1. Yes
- 2. No

[ASK AW4 IF AW3 = 1, ELSE SKIP TO AW5]

AW4 Please identify any Save on Energy programs you've heard of: [ACCEPT MULTIPLE SELECTIONS]

- 1. Business Retrofit incentives for prescriptive retrofit projects
- Custom Retrofit incentives for custom retrofit projects (available starting in May 2023)
- 3. Strategic Energy Management resources and training for enhanced energy management
- 4. Small Business up to \$2,000 in incentives for lighting projects and \$2,500 for nonlighting projects
- 5. Existing Building Commissioning incentives for improved facility operations, maintenance and business practices
- 6. Training and Information Workshops covers up to 50% of the registration fee for a variety of skills, including developing a business case, understanding energy data, energy management, building commissioning, and more
- 7. I am aware of Save on Energy programs in general but am not sure of their names

AW5 Prior to participating in the *<measure_name> <format>*, how many times would you say your organization had received incentives from Save on Energy?

- 1. 0
- 2. 1-5
- 3. 6-10
- 4. >10
- 98. Don't know

A.2.4 Motivation to Participate

DETERMINE MOTIVATIONS TO PARTICIPATE

M1 Why did you decide to spend the time to attend the *<measure_name> <format>*? Please select all that apply. [ACCEPT MULTIPLE RESPONSES]

- 1. Personal interest
- 2. To gain knowledge to support my job function
- 3. To gain knowledge to manage and/or train staff
- 4. To gain knowledge about energy for professional advancement
- 5. To better understand existing energy use

- 6. To better understand energy projects that are planned or underway
- 7. To better plan future energy projects
- 8. To help <organization> participate in another Save on Energy program

97. Other [OPEN END TEXT BOX]

M2 Generally, how familiar were you with the topic of *<topic*> before you attended the *<*format>? [0-10 SCALE, DEFINED AS 0=NOT AT ALL FAMILIAR, 10=EXTREMELY FAMILIAR]

M3 When you registered for the *<format>*, what was the thing you were *most* interested in learning? Please select one.

[IF <TYPE> = ENERGY DATA, PRESENT 1-6 AND 97]

- 1. Value of energy data
- 2. Accessing and analyzing your energy data
- 3. Using data management and analysis tools
- 4. Using data to identify energy-efficiency and conservation opportunities
- 5. Developing and using a baseline
- 6. How to contribute to a climate action plan using energy data
- 97. Other [OPEN END TEXT BOX]

[IF <TYPE> = ISO 50001, PRESENT 7-11 AND 97]

- 7. Better understanding of ISO 50001
- 8. Basics of energy management and its role in greenhouse gas emission reduction goals
- 9. How to start an energy management plan or project
- 10. Enhancing participation in other Save on Energy' Programs
- 11. Benefits and suitability of ISO 50001 certification
- 97. Other [OPEN END TEXT BOX]

[IF <TYPE> = PUMPS AND FANS, PRESENT 12-13 AND 97]

- 12. How to use tools and calculators
- 13. How to understand optimal times to employ approaches to save energy
- 97. Other [OPEN END TEXT BOX]

[IF <TYPE> = EBCX, PRESENT 14-18 AND 97]

- 14. Understanding the basics of commissioning
- 15. Understanding the process of commissioning
- 16. Understanding typical changes and optimization opportunities
- 17. Understanding technical skills for a successful project execution
- 18. Developing technical skills to undertake a successful project
- 97. Other [OPEN END TEXT BOX]

[IF <TYPE> = PMEM, PRESENT 19-20 AND 97]

- 19. How to assess energy performance
- 20. How to identify opportunities for savings
- 97. Other [OPEN END TEXT BOX]

[IF <TYPE> = PAB, PRESENT 21-24 AND 97]

- 21. Understanding performance analysis
- 22. Understanding how to improve performance

- 23. Understanding how to identify trends and spot problems
- 24. Understanding how to gauge current performance and potential for type and location
- 97. Other [OPEN END TEXT BOX]
- [IF <TYPE> = EBCX3, PRESENT 25-26 AND 97]
 - 25. Understanding how to tune up your building
 - 26. Understanding how to drive down operating costs through commissioning
 - 97. Other [OPEN END TEXT BOX]
- [IF <TYPE> = RSB, PRESENT 27-29 AND 97]
 - 27. Understanding retrofit approaches and tools
 - 28. Understanding how to develop an easy-to-execute plan
 - 29. Understanding how to access retrofit programs offered in Ontario
 - 97. Other [OPEN END TEXT BOX]
- [IF <TYPE> = EAES, PRESENT 30-31 AND 97]
 - 30. Understanding how to develop a strategy to lower energy emissions and costs
 - 31. Understanding how peak demand, building condition, and your utility impact energy supply options.
 - 97. Other [OPEN END TEXT BOX]

[IF <TYPE> = EASB, PRESENT 32-34 AND 97]

- 32. Learning with and from my peers
- 33. Receiving project advice and coaching support
- 97. Other, please explain [OPEN END]

M4 Thinking back to when you registered for the *<format>*, before you attended the *<format>* how knowledgeable were you about the topic of "[PIPE IN M3 RESPONSE]"? [0-10 scale, defined as 0=not at all knowledgeable, 10=extremely knowledgeable]

A.2.5 Impact and Influence

DETERMINE IMPACT AND INFLUENCE OF PARTICIPATING IN CBI

IN1 After your participation in the *<format*>, how would you rate your familiarity with the topic of *"<type_name>"*? [0-10 SCALE, DEFINED: 0=NOT AT ALL FAMILIAR, 10=EXTREMELY FAMILIAR]

IN2 After participating in the *<format>*, how would you rate your knowledge about the topic of "[PIPE IN M3 RESPONSE]"? [0-10 SCALE, DEFINED: 0=NOT AT ALL KNOWLEDGEABLE, 10=EXTREMELY KNOWLEDGEABLE]

IN3 Have you had the opportunity to put your increased familiarity and knowledge from participating in the *<format*> to use at *<organization*>?

- 1. Yes
- 2. No
- 98. Don't know

[ASK IF IN3 =1, ELSE SKIP TO IN3B]

IN3A How have you used your increased familiarity and knowledge at work? [OPEN END]

[ASK IF IN3 =2, ELSE SKIP TO IN4]

IN3B Why have you not had the opportunity to use your increased familiarity and knowledge at work? [OPEN END]

IN4 Did your participation in this *<format>* lead directly to *<organization>*'s participation in any Save on Energy programs?

- 1. Yes
- 2. No
- 3. Not yet, but we plan to
- 97. Other, Please explain [OPEN END]
- 98. Don't know

[ASK IN5 IF IN4 = 1 OR 3, ELSE SKIP TO IN7]

IN5 How influential was your experience with the *<format>* on *<organization>*'s decision to participate in the Save on Energy program(s)? [0-10 SCALE, DEFINED AS 0=NOT AT ALL INFLUENTIAL AND 10=EXTREMELY INFLUENTIAL] [RESPONSE REQUIRED]

[ASK IN6 IF IN4 =2, ELSE SKIP TO IN7]

IN6 What has prevented *<organization>* from participating in any of the Save on Energy programs? [OPEN END]

IN7 Did your participation in this *<format>* lead directly to *<organization>*'s implementing any energy-efficiency or energy conservation measures *outside* of a Save on Energy program?

- 1. Yes
- 2. No

[ASK IN8 IF IN7 =1, ELSE SKIP TO IN9]

IN8 How influential was your experience with the *<format>* on *<organization>*'s decision to install the project(s), operational or behavioural change(s) outside a Save on Energy program? [0-10 SCALE, DEFINED AS 0=NOT AT ALL INFLUENTIAL AND 10=EXTREMELY INFLUENTIAL] [RESPONSE REQUIRED]

IN9 Did your participation in this *format*> lead directly to *corganization*>'s *making plans* to implement any energy-efficiency or energy conservation measures or improvements as part of <u>or</u> outside of a Save on Energy program, that *have not started*?

Yes
 No
 Don't know

[ASK IN10 IF IN9 =1, ELSE SKIP TO IN11]

IN10 How influential was your experience with the *<format>* on *<organization>*'s decision to plan the project(s), operational or behavioural change(s)? [0-10 SCALE, DEFINED AS 0=NOT AT ALL INFLUENTIAL AND 10=EXTREMELY INFLUENTIAL] [RESPONSE REQUIRED]

IN11 Did you take any other energy-efficiency or conservation actions that were influenced by your participation in the <format>, besides those you have already mentioned?

- 1. Yes
- 2. No

A.2.6 Satisfaction

SAT1 How satisfied are you with: [0-10 SCALE, DEFINED AS 0=NOT AT ALL SATISFIED, 10=EXTREMELY SATISFIED, NA]

- A. *<format>* content delivered in the slide presentation
- B. Quality of the instructors
- C. Suitability to your experience level with the topic
- D. Clear takeaways that you can use at work
- E. Clear materials to share with staff at work
- F. Next steps to learn more about the topic
- G. Next steps to implement what you learned
- H. What you learned about *<type>*
- I. Your overall experience with this Save on Energy <format>

A.2.7 Projects Influenced by Participation

[ASK IP1 IF IN4 = 1 AND IN5 > 5, ELSE SKIP TO IP2]

IP1 Earlier you said that your participation in the *<format>* influenced *<organization>*'s decision to *implement projects or improvements through a Save on Energy program*. Please briefly describe the project(s) or improvement(s). (Please include, as you're able, the products involved, the project size or scale, and completion date. Tell us if the project focused on operations or maintenance; behavioural or scheduling; lighting; HVAC; envelope; refrigeration; something else.) [OPEN END]

[ASK IP2 IF IP1 NOT OFFERED, IN7 = 1 AND IN8 >5, ELSE SKIP TO IP3]

IP2 Earlier you said that your participation in the *<format>* influenced *<organization>*'s decision to implement projects or improvements *without support or incentives from a Save on Energy program*.

Please briefly describe the project(s) or improvement(s). (Please include, as you're able, the products involved, the project size or scale, and completion date. Tell us if the project focused on operations or maintenance; behavioural or scheduling; lighting; HVAC; envelope; refrigeration; something else.) [OPEN END].

[ASK IP3 IF NEITHER IP1 NOR IP2 IS OFFERED, IN4 = 3 OR IN9 = 1 AND IN10 >5, ELSE SKIP TO IP4]

IP3 Earlier you said that your participation in the *<format>* influenced *<organization>'s* decision to *plan* projects or improvements. Please briefly describe the project(s) or improvement(s). (Please include, as you're able, the products involved, the project size or scale, completion date. Tell us if the project focused on operations or maintenance; behavioral or scheduling; lighting; HVAC; envelope; refrigeration; something else. Will the project go through a Save on Energy program?) [OPEN END]

[ASK IP4 IF IN11 = 1 AND IP1-IP3 NOT OFFERED, ELSE SKIP TO PV1]

IP4 Earlier you said that your participation in the *<format>* influenced *<organization>*'s decision to implement **other projects or improvements**. Please briefly describe the project(s) or improvement(s). (Please include, as you're able, the products involved, the project size or scale, completion date. Tell us if the project focused on operational or maintenance; behavioural or scheduling; lighting; HVAC; envelope; refrigeration; Something else. Did the project go through a Save on Energy program?) [OPEN END]

A.2.8 Perceived Value

Determine the perceived economic value of the initiatives.

[ASK PERCEIVED VALUE BATTERY IF ANY IN4, IN7, OR IN11 = 1, ELSE SKIP TO R1]

PV1. Since participating in the *<format*>, which, if any, of the following benefits did *<organization*> experience from energy-efficiency projects or improvements implemented? [CHOOSE ALL THAT APPLY]

| | ENERGY | EXAMPLE | ANSWER OPTIONS |
|---|--------------|--|------------------------|
| | BENEFIT | | |
| А | Energy bill | Reduced hydro or natural gas bills at your | 1. Experienced benefit |
| | savings | organization's facility(s). | 2. Did not experience |
| | | | 98. Don't know |
| | NON-ENERGY | EXAMPLE | ANSWER OPTIONS |
| | BENEFITS | | |
| В | Reduced food | Reduced spoilage of perishable products due to | 1. Experienced benefit |
| | spoilage | improved refrigeration or ventilation. | 2. Did not experience |

| | | | 98. Don't know |
|---|-------------------|--|------------------------|
| С | Improved indoor | Reduced dust. Less irritation for those with | 1. Experienced benefit |
| | air quality | respiratory sensitivities. | 2. Did not experience |
| | | | 98. Don't know |
| D | Reduced | Buildings maintains a comfortable temperature | 1. Experienced benefit |
| | cold/heat-related | (not too hot, not too cold). May be indicated by | 2. Did not experience |
| | stress (improved | reduced employee or customer complaints, | 98. Don't know |
| | thermal comfort) | may be associated with increased employee | |
| | | productivity | |
| | | | |
| E | Reduced building | Fewer hours needed from operations and | 1. Experienced benefit |
| | and/or | maintenance teams to maintain building | 2. Did not experience |
| | equipment | systems after efficient measure implemented | 98. Don't know |
| | operations and | (e.g., fewer light bulb change-outs, reduced | |
| | maintenance | HVAC equipment maintenance) | |
| | (O&M) time and | Fewer hours needed from other staff due to | |
| | costs | measure installation (e.g., reduced invoice | |
| | | processing) | |
| F | None of the | | |
| | Above | | |

[ASK CORRESPONDING PV2 FOR EACH A - E AND 97 SELECTION FROM PV1, ELSE SKIP TO R1]

[ASK PV2A IF PV1A = 1]

PV2A Think about the value of [PRESENT PV1A] to your organization. Please estimate as best you can the annual the bill savings achieved by the energy-efficiency projects or improvements. [BOXES TO INSERT VALUE FOR ELECTRICITY, GAS, OTHER – PLEASE SPECIFY, NO DECIMALS]

[ASK PV2B IF PV1B = 1]

PV2B Think about the value of reduced food spoilage to *<organization>*. If you had to pay for this benefit, independent of the energy savings, how much would you be prepared to pay per year? **(OPEN END)**

[ASK PV2C IF PV1C = 1]

PV2C Think about the value of improved indoor air quality to *<organization*>. If you had to pay for this benefit, independent of the energy savings, how much would you be prepared to pay per year?

\$[OPEN END]

[ASK PV2D IF PV1D = 1]

PV2D Think about the value of improved thermal comfort to *<organization>*. If you had to pay for this benefit, independent of the energy savings, how much would you be prepared to pay per year? \$[OPEN END]

[ASK PV2E IF PV1E = 1]

PV2E Think about the value of reduced operations and maintenance (O&M) time and cost to <*organization*>. If you had to pay for this benefit, independent of the energy savings, how much would you be prepared to pay per year? **\$**[OPEN END]

[ASK PV2F IF PV1 = 97]

PV2F Think about the value of [RESPONSE TO PV1-97] to *organization*. If you had to pay for this benefit, independent of the energy savings, how much would you be prepared to pay per year? \$[OPEN END]

A.2.9 Recommendations

R1 Do you have any other thoughts, questions, or recommendations for *Save on Energy* or the *"<format>"* instructors? [OPEN END]

A.2.10 Firmographics

- F1 What industry or industries are in your facilities? [OPEN END]
- F2 What size is your facility? Approximately _____ square feet [SQUARE FEET]
- F3 How old is your facility? _____ years old [YEARS]
- F4 How many people work or live in your facility? _____FTE or resident count [FTE]

A.2.11 Closing

- C1 Is there anything else you would like to tell us? [OPEN END]
- A.2.12 Closing Screen Message

[PRESENT IF SC1 = 2, 98]

Thank you for your time today.

Unfortunately, you do not qualify for this survey.

[PRESENT IF SC1 = 1 AND SURVEY IS COMPLETED]

Thank you for your time!

Your responses will help the IESO's Save on Energy to shape future initiatives.

Please allow six weeks to receive your \$10 VISA e-gift card. It will be emailed to you from <u>admin@hawkmarketplace.com</u>.