



September 30, 2013

Ms. Kirsten Walli  
Board Secretary  
Ontario Energy Board  
2300 Yonge Street, 27th Floor  
P.O. Box 2319  
Toronto, ON M4P 1E4

Dear Ms. Walli:

**RE: Guelph Hydro Electric Systems Inc. (ED-2002-0565)  
Conservation and Demand Management (CDM) Code for Electricity  
Distributors – CDM Annual Filing (EB-2010-0215)**

In accordance with the Ontario Energy Board's (OEB) "*Conservation and Demand Management Code for Electricity Distributors*", issued on September 16, 2010, attached is Guelph Hydro Electric Systems Inc.'s 2012 CDM Annual Report submission.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Cristina Birceanu", is written over a light blue horizontal line.

Cristina Birceanu

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# **Guelph Hydro Electric Systems Inc.**

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## **Conservation and Demand Management 2012 Annual Report**

**Submitted to:  
Ontario Energy Board**

**Submitted on September 30, 2013**

**TABLE OF CONTENTS**

**EXECUTIVE SUMMARY ..... 1**

**BACKGROUND..... 2**

**1 CONSERVATION FRAMEWORK..... 3**

    1.1 CURRENT FRAMEWORK .....3

    1.2 FUTURE FRAMEWORK .....3

**2 BOARD-APPROVED CDM PROGRAMS ..... 5**

    2.1 INTRODUCTION.....5

    2.2 TOU PRICING.....5

        2.2.1 BACKGROUND .....5

        2.2.2. TOU PROGRAM DESCRIPTION .....6

    2.3 Guelph Hydro Electric Systems Inc.'s APPLICATION WITH THE OEB .....7

**3. OPA-CONTRACTED PROVINCE-WIDE CDM PROGRAMS ..... 8**

    3.1 INTRODUCTION.....8

    3.2 PROGRAM DESCRIPTIONS .....12

        3.2.1 RESIDENTIAL PROGRAMS .....12

        3.2.2 COMMERCIAL AND INSTITUTIONAL PROGRAM .....22

        3.2.3 INDUSTRIAL PROGRAM .....30

        3.2.4 LOW INCOME INITIATIVE (HOME ASSISTANCE PROGRAM) (Schedule E-1).....35

        3.2.5 PRE-2011 PROGRAMS .....36

**4 2012 LDC CDM RESULTS ..... 37**

    4.1 PARTICIPATION AND SAVINGS.....37

    4.2 EVALUATION .....40

    4.3 SPENDING.....43

    4.4 ADDITIONAL COMMENTS.....49

**5 COMBINED CDM REPORTING ELEMENTS ..... 50**

    5.1 PROGRESS TOWARDS CDM TARGETS.....50

5.2	VARIANCE FROM STRATEGY.....	51
5.3	OUTLOOK TO 2014 AND STRATEGY MODIFICATIONS.....	52
<b>6.0</b>	<b>CONCLUSION .....</b>	<b>54</b>
	<b>APPENDIX A: INITIATIVE DESCRIPTIONS .....</b>	<b>55</b>
	<b>APPENDIX B: PRE-2011 PROGRAMS .....</b>	<b>68</b>

## Executive Summary

This annual report is submitted by Guelph Hydro Electric Systems Inc. (“Guelph Hydro”) in accordance with the filing requirements set out in the CDM Code (Board File No. EB-2010-0215), specifically Appendix C Annual Report Template, as a progress report and modification to Guelph Hydro Strategy. Accordingly, this report outlines Guelph Hydro CDM activities for the period of January 1, 2012 to December 31, 2012. It includes net peak demand and net energy savings achieved from 2011 and 2012, discussion of the current/future CDM framework, CDM program activities, successes and challenges, as well as forecasted savings to the end of 2014.

Guelph Hydro did not apply for any Board-Approved CDM Programs during 2012; however, as noted in the CDM guidelines, released April 26, 2012, the Ontario Energy Board (OEB) has deemed Time-of-Use (TOU) pricing a Province-wide Board-Approved CDM Program. The Ontario Power Authority (OPA) is to provide measurement and verification on TOU. At the time of this report the OPA has not released any verified results of TOU savings to Guelph Hydro.

In 2011, Guelph Hydro contracted with the Ontario Power Authority (OPA) to deliver a portfolio of OPA-Contracted Province-Wide CDM Programs to all customer segments including residential, commercial, institutional, industrial and low income. These programs were rolled-out by the OPA in June 2011. In 2011 Program activities were centered on building a foundation for full program execution over the next three years of the program term, including staffing, procurement, and program delivery.

In 2012 Guelph Hydro achieved 5.1 MW of net incremental peak demand savings and 8.9 GWh of net incremental energy savings. A summary of the achievements towards the CDM targets is shown below:

OPA-Contracted Province-Wide CDM Programs FINAL 2012 Results				
LDC: Guelph Hydro Electric Systems Inc.				
FINAL 2012 Progress to Targets	2012 Incremental	Program-to-Date Progress to Target (Scenario 1)	Scenario 1: % of Target Achieved	Scenario 2: % of Target Achieved
Net Annual Peak Demand Savings (MW)	5.1	6.9	41.2%	47.6%
Net Energy Savings (GWh)	8.9	85.0	106.8%	106.9%
Scenario 1 = Assumes that demand resource resources have a persistence of 1 year				
Scenario 2 = Assumes that demand response resources remain in your territory until 2014				

At year-end 2012, Guelph Hydro has exceeded its 2014 electricity energy savings target. Although Guelph Hydro’s 2012 peak demand savings are slightly below target, a pipeline analysis prepared for this report forecasts a shortfall of approximately 4.1 MW, or 25% of Guelph Hydro’s 2014 peak demand reduction target of 16.91 MW. Given the anticipated shortfall, Guelph Hydro continues to work actively on participant engagement. In addition, Guelph Hydro has partnered with other LDCs, and has been working with the Ontario Power Authority (“OPA”) and the Electrical Distribution Association (“EDA”) to improve program effectiveness. However, it is Guelph Hydro’s belief that this effort in itself will not fully overcome the forecasted peak demand savings shortfall.

## Background

On March 31, 2010, the Minister of Energy and Infrastructure of Ontario, under the guidance of sections 27.1 and 27.2 of the *Ontario Energy Board Act, 1998*, directed the Ontario Energy Board (OEB) to establish Conservation and Demand Management (CDM) targets to be met by electricity distributors. Accordingly, on November 12, 2010, the OEB amended the distribution license of Guelph Hydro to require Guelph Hydro, as a condition of its license, to achieve 79.53 GWh of net cumulative energy savings and 16.71 MW of summer peak demand savings, over the period of January 1, 2011 through to December 31, 2014.

In accordance with the same Minister's directive, the OEB issued the Conservation and Demand Management Code for Electricity Distributors (the Code) on September 16, 2010. The code sets out the obligations and requirements with which electricity distributors must comply in relation to the CDM targets set out in their licenses. To comply with the Code requirements, Guelph Hydro submitted its CDM Strategy on November 1, 2010, which provided a high level description of how Guelph Hydro intended to achieve its CDM targets.

The Code also requires a distributor to file annual reports with the Board. This is the second Annual Report by Guelph Hydro and has been prepared in accordance with the Code requirement and covers the period from January 1, 2012 to December 31, 2012.

Guelph Hydro submitted its 2011 Annual Report on October 1, 2012, which summarized the CDM activities, successes and challenges experienced by Guelph Hydro for the January 1, 2011 to December 31, 2011 period. The OEB's 2011 CDM Results report identified that the delay in the full suite of CDM Programs being made available by the OPA, and the absence of some programs negatively impacted the final 2011 results for the LDCs. This issue was also highlighted in Volumes I & II of the Environmental Commissioner's Report on Ontario's Annual Energy Conservation Progress.

On December 21, 2012, the Minister of Energy directed the Ontario Power Authority (OPA) to fund CDM programs which meet the definition and criteria for OPA-Contracted Province-Wide CDM Programs for an additional one-year period from January 1, 2015 to December 31, 2015.

The Ministerial Directive did not amend the timelines for LDCs to achieve their energy savings and demand savings targets. Therefore, the main focus of LDCs, including Guelph Hydro, remains the achievement of CDM targets by December 31, 2014.

# **1 Conservation Framework**

## **1.1 Current Framework**

Ontario's current CDM framework is a key step towards creating a culture of conservation in the Province. The Government's Directive to the OEB to establish CDM targets that would be met by electricity distributors recognizes the importance of CDM for both electricity customers and the electricity system. CDM helps customers manage rising energy costs, support the provincial integrated supply plan, as well as address local distribution and transmission supply constraints. The current framework was intended to enable customers to benefit from a suite of both Board-Approved and OPA Province-Wide programs, and be a portfolio that would meet both broad and specific customer needs.

The state of Board-Approved programs and the current suite of Province-Wide OPA programs have limited CDM offerings to customers. This has limited customer savings potential and has restricted the associated opportunity for LDCs to meet their targets. The process to introduce changes to current program Initiatives or to pilot new Initiatives has been challenging, taking considerable cost and effort, which has resulted in limited benefits to customers and CDM savings.

Moving forward, the future CDM framework should address the challenges of the current framework and build on its strengths. Currently overbuilt governance and excessive legal requirements results in a slow, bureaucratic process, with a burdensome administrative process. There is a misalignment of control and risk where LDCs have the accountability to achieve their respective CDM targets as a condition of distribution license, but the authority for design and funding are controlled substantially by the OPA.

The Ministerial Directive provides a framework for the continuation of conservation programs and associated compensation for the participants; however the subsequent savings would not be attributed to any LDC target and in effect would be 'lost' due to misalignment of the current CDM framework and LDC Targets. In addition, the establishment of defined administrative or program delivery funding for 2015 is required to avoid a "stop and start" process.

## **1.2 Future Framework**

LDCs are supportive of government's renewed commitment for conservation and demand management in Ontario. LDCs are committed to working with the government and other stakeholders to develop the next framework for CDM in the Province.

Long-term commitment for CDM funding and a confirmation of the role of the LDC are needed. This will allow LDCs to maintain current program infrastructure including LDC staff and third party contracts through 2015 and beyond.

Providing clarity and continuity into the next framework is critical for all customers. To ensure a seamless and smooth transition that maintains and builds upon CDM momentum beyond 2014, a new CDM framework should be in place well before the expiry of the current one. Work involving key parties including LDCs, government, the OPA, OEB as well as customer groups should start in 2013 to allow for a

new framework to be in place by early 2014. The remainder of 2014 would be utilized for program development and design, economic analysis, procurement and launching of new CDM program initiatives.



## **2 Board-Approved CDM Programs**

### **2.1 Introduction**

In its Decision and Order dated November 12 2010 (**EB-2010-0215 & EB-2010-0216**), the OEB ordered that, (to meet its mandatory CDM targets), “Each licensed electricity distributor must, as a condition of its licence, deliver Board-Approved CDM Programs, OPA-Contracted Province-Wide CDM Programs, or a combination of the two”.

At this time, the implementation of Time-of-Use (“TOU”) Pricing has been deemed as a Board-Approved Conservation and Demand Management (“CDM”) program that is being offered in Guelph Hydro’s service area.

### **2.2 TOU Pricing**

#### **2.2.1 BACKGROUND**

In its April 26, 2012 CDM Guidelines, the OEB recognizes that a portion of the aggregate electricity demand target was intended to be attributable to savings achieved through the implementation of TOU Pricing. The OEB establishes TOU prices and has made the implementation of this pricing mechanism mandatory for distributors. On this basis, the OEB has determined that distributors will not have to file a Board-Approved CDM program application regarding TOU pricing. The OEB has deemed the implementation of TOU pricing to be a Board-Approved CDM program for the purposes of achieving the CDM targets. The costs associated with the implementation of TOU pricing are recoverable through distribution rates, and not through the Global Adjustment Mechanism (“GAM”).

In accordance with a Directive dated March 31, 2010 by the Minister of Energy and Infrastructure, the OEB is of the view that any evaluation of savings from TOU pricing should be conducted by the OPA for the province, and then allocated to distributors. Guelph Hydro will report these results upon receipt from the OPA.

At the time of preparation of this report the OPA had retained the Brattle Group as the evaluation contractor, and we understand would be working with an expert panel convened to provide advice on methodology, data collection, models, etc. Initial evaluations were conducted with 5 LDCs – Hydro One, THESL, Ottawa Hydro, Thunder Bay and Newmarket, and we expect preliminary results from these 5 LDCs to be issued and available for use as part of their LDC forecasts going forward. The OPA has indicated that a province wide LDC sampling strategy will be developed in 2013 to guide the TOU evaluation for all Ontario LDCs. This will lead to final verified results covering the period 2011-2014 made available to LDCs August 2015. Verified TOU 2011-2014 impacts will be included as part of the Final 2014 Verified CDM Results Report, for inclusion in our 2014 Annual CDM Report to the OEB.

As of September 30, 2013, the OPA has not released any verified results of TOU savings to Guelph Hydro. Therefore Guelph Hydro is not able to provide any verified savings related to LDC’s TOU program at this time. We understand that there likely will be a reduction from the 2010 business case estimate of province-wide peak demand savings from TOU of 308 MW.

## TOU PROGRAM DESCRIPTION

**Target Customer Type(s):** Residential and small business customers (up to 250,000 kWh per year)

**Initiative Frequency:** Year-Round

**Objectives:** TOU pricing is designed to incent the shifting of energy usage. Therefore peak demand reductions are expected, and energy conservation benefits may also be realized.

**Description:** In August of 2010, the OEB issued a final determination to mandate TOU pricing for Regulated Price Plan (“RPP”) customers by June 2011, in order to support the Government’s expectation for 3.6 million RPP consumers to be on TOU pricing by June 2011, and to ensure that smart meters funded at ratepayer expense are being used for their intended purpose.

The RPP TOU price is adjusted twice annually by the OEB. A summary of the RPP TOU pricing is provided below:

RPP TOU Effective Date	Rates (cents/kWh)		
	On Peak	Mid Peak	Off Peak
November 1, 2010	9.9	8.1	5.1
May 1, 2011	10.7	8.9	5.9
November 1, 2011	10.8	9.2	6.2
May 1, 2012	11.7	10.0	6.5
November 1, 2012	11.8	9.9	6.3
May 1, 2013	12.4	10.4	6.7

**Delivery:** The OEB set the rates; LDCs install and maintain the smart meters; LDCs convert customers to TOU billing.

**Initiative Activities/Progress:**

Guelph Hydro began transitioning its RPP customers to TOU billing in May 2011.

At December 31<sup>st</sup>, 2012, 46,564 of Guelph Hydro’s RPP customers were on TOU billing. Note that this figure excludes customers with a smart meter that are billed by a retailer.

## 2.3 Guelph Hydro's Application with the OEB

As noted in Guelph Hydro's 2011 CDM Annual Report, in 2011 Guelph Hydro undertook some activities towards the development of an OEB Tier2 / Tier 3 program funding application, including:

- the review and analysis of OEB Decision EB-2011-0011, the "Toronto Hydro decision", particularly with respect to the requirements of the "non-duplicative" nature of proposed programs, and the need for OPA review and discussion prior to the submission of an application;
- an analysis and comparison of the proposed programs and Tier 1 programs;
- further development of a preliminary set of proposals included in Guelph Hydro's CDM Strategy, including the refinement of program measures and development of preliminary program specific TRC calculations. Potential programs included:
  - **Home Efficiency Visit;**
  - **Education – "Generation Conservation";**
  - **Smart Wash; and**
  - **Royal Flush.**
- preliminary discussions with the OPA regarding the proposal submission and review process in December 2011.

In 2012 Guelph Hydro continued working with the OPA regarding the viability of the potential Tier2 / Tier 3 programs listed above. Through Q1 – Q2 2012, the first phase of the OPA project review process attempted to determine whether any of the proposed projects were deemed "duplicative" using the parameters provided by regulatory guidelines. The end result of this work indicated that the proposed Home Efficiency Visit program was clearly duplicative of existing OPA Tier 1 programs, for a variety of reasons, including the use of measures offered in other programs, while targeting a different customer segment, but that the Smart Wash and Royal Flush programs would not be deemed "duplicative" of existing Tier 1 programs. The OPA indicated that more work was required by Guelph Hydro to validate the potential Smart Wash and Royal Flush programs through a variety of cost-benefit calculations before the submission could be taken to the next step.

Early in 2012 Guelph Hydro intended to work through the next steps associated with a Tier 2 / Tier 3 application for the potential programs identified above. However, due to the uncertainty around approvals for these programs, Guelph Hydro determined that there was a greater need to focus on the delivery of existing programs already in market. The effort put into the secondary program development, review and approval processes was deemed a distraction, and this work was put on hold.

In 2013 Guelph Hydro intends to review market conditions for continuation of the Tier 2 / Tier 3 program application process started in 2011.

There were no LDC programs approved by the OEB in 2012.

### 3. OPA-Contracted Province-Wide CDM Programs

#### 3.1 Introduction

Effective March 11, 2011, Guelph Hydro entered into an agreement with the OPA to deliver CDM programs extending from January 1, 2011 to December 31, 2014. These programs are listed below, with program details included in Appendix A.

In addition, the following tables also include CDM programs which contained projects started prior to January 1, 2011, but which were completed in 2011:

Initiative	Schedule	Date schedule posted	Customer Class	LDC In-Market Date
<b>Residential Programs</b>				
Appliance Retirement	Schedule B-1, Exhibit D	Jan 26, 2011	All residential rate classes	Q1 - 2011
Appliance Exchange	Schedule B-1, Exhibit E	Jan 26, 2011	All residential rate classes	Q2 - 2011
HVAC Incentives	Schedule B-1, Exhibit B	Jan 26, 2011	All residential rate classes	Q2 - 2011
Conservation Instant Coupon Booklet	Schedule B-1, Exhibit A	Jan 26, 2011	All residential rate classes	Q1 - 2011
Bi-Annual Retailer Event	Schedule B-1, Exhibit C	Jan 26, 2011	All residential rate classes	Q3 - 2011
Retailer Co-op	n/a	n/a	All residential rate classes	n/a
Residential Demand Response	Schedule B-3	Aug 22, 2011	All general service classes	2012 - see 3.2.1.8 for details
New Construction Program	Schedule B-2	Jan 26, 2011	All residential rate classes	n/a

Initiative	Schedule	Date schedule posted	Customer Class	LDC In-Market Date
<b>Commercial &amp; Institutional Programs</b>				
Efficiency Equipment Replacement Initiative	Schedule C-2	Jan 26, 2011	All general service classes	Q2 - 2011

Direct Install Lighting	Schedule C-3	Jan 26, 2011	General Service < 50 kW	Q2 - 2011
Existing Building Commissioning Incentive	Schedule C-6	Feb 2011	All general service classes	n/a
New Construction and Major Renovation Initiative	Schedule C-4	Feb 2011	All general service classes	Q4 - 2012
Energy Audit	Schedule C-1	Jan 26, 2011	All general service classes	Q3 - 2011
Commercial Demand Response (part of the Residential program schedule)	Schedule B-3	Jan 26, 2011	All general service classes	2012 - see 3.2.1.8 for details
Demand Response 3 (part of the Industrial program schedule)	Schedule D-6	May 31, 2011	General Service 50 kW & above	Q1 - 2011

<b>Initiative</b>	<b>Schedule</b>	<b>Date schedule posted</b>	<b>Customer Class</b>	<b>LDC In-Market Date</b>
<b>Industrial Programs</b>				
Process & System Upgrades	Schedule D-1	May 31, 2011	General Service 50 kW & above	Q4 - 2011
Monitoring & Targeting	Schedule D-2	May 31, 2011	General Service 50 kW & above	Q4 - 2011
Energy Manager	Schedule D-3	May 31, 2011	General Service 50 kW & above	n/a
Key Account Manager ("KAM")	Schedule D-4	May 31, 2011	General Service 50 kW & above	Q2 - 2011
Efficiency: Equipment Replacement Incentive (part of the C&I program schedule)	Schedule C-2	May 31, 2011	General Service 50 kW & above	Q2 - 2011
Demand Response 3	Schedule D-6	May 31, 2011	General Service 50 kW & above	Q1 - 2011
<b>Home Assistance Program</b>				
Home Assistance Program	Schedule E-1	May 9, 2011	All residential rate classes	n/a – see 3.2.4 for details

Results were realized towards LDC's 2011-2014 target through the following pre-2011 programs:

Initiative	Schedule	Date schedule posted	Customer Class
<b>Pre-2011 Programs</b>			
Electricity Retrofit Incentive Program	n/a	n/a	All general service classes
High Performance New Construction	n/a	n/a	All general service classes
Toronto Comprehensive	n/a	n/a	All general service classes
Multifamily Energy Efficiency Rebates	n/a	n/a	All general service classes
Data Centre Incentive Program	n/a	n/a	All general service classes
EnWin Green Suites	n/a	n/a	All general service classes

As per the table below, several program initiatives are no longer available to customer or have not been launched in 2012.

Initiative Not in Market in 2012	Objective	Status
<b>Residential Programs</b>		
Midstream Electronics	The objective of this initiative is to encourage retailers to promote and sell high efficiency televisions, and for distributors to distribute high efficiency set top boxes.	Never launched and removed from Schedule in Q2, 2013.
Midstream Pool Equipment	The objective of this initiative is to encourage pool installers to sell and install efficient pool pump equipment in residential in-ground pools.	Never launched and removed from Schedule in Q2, 2013.
Aboriginal Conservation Program	First Nations programs are delivered by the OPA and results are attributed to LDCs for reporting.	Launched in 2013 by OPA.
Home Energy Audit Tool	This is a provincial online audit tool to engage customers in conservation and help drive customer participation to CDM programs.	Never launched and removed from Schedule in Q2, 2013.
<b>Commercial &amp; Institutional Program</b>		
Direct Service Space Cooling	The objective of this initiative is to offer free servicing of air conditioning systems and refrigeration units for the purpose of achieving energy savings and demand reduction.	Not launched to market in 2011/2012. As per the OPA there no plans to launch this Initiative in 2013.

Demand Response 1 (“DR1”)	This initiative allows distribution customers to voluntarily reduce electricity demand during certain periods of the year pursuant to the DR 1 contract. The initiative provides DR payment for service for the actual electricity reduction provided during a demand response event.	No customer uptake for this initiative. As a result this Initiative was removed from the Schedule in Q4, 2012.
<b>Industrial Program</b>		
DR1	As above	No customer uptake for this initiative. Removed in Q4, 2012.

The Master CDM Program Agreement includes program change management provision in Article 3. Collaboration between the OPA and the Local Distribution Companies (LDCs) commenced in 2011, and continued in 2012, as the change management process was implemented to enhance the saveONenergy program suite. The change management process allows for modifications to the Master Service Agreement and initiative Schedules. The program enhancements give LDCs additional tools and greater flexibility to deliver programs in a way that meets the needs of customers and further drives participation in the Initiatives.

## 3.2 Program Descriptions

Full OPA-Contracted Province-Wide CDM Program descriptions are available from the OPA, and additional initiative information can be found on the saveONenergy website at <https://saveonenergy.ca>. The targeted customer types, objectives, and individual descriptions for each Program Initiative are detailed in Appendix A.

### 3.2.1 RESIDENTIAL PROGRAMS

**Description:** Provides residential customers with programs and tools to help them understand and manage the amount of energy they use throughout their entire home, as well as help the environment.

**Objective:** To provide incentives to both existing homeowners and developers/builders to motivate the installation of energy efficiency measures in both existing and new home construction.

**Discussion:**

The inclusion of LED technology into the Biannual Retailers events in 2012 and the annual coupons in 2013, as well as some LDC custom coded coupons, has had a positive effect on consumer engagement. The revamped PeaksaverPLUS program is the main Residential Initiative which drives savings for LDCs and has been well received by consumers eager to utilize an In Home Display to help manage their energy consumption.

The Residential Program Portfolio is predominately a carryover of Initiatives from previous programs. It is mostly driven by retailers and contractors who many not have fully delivered what was anticipated. Three new initiatives were never launched and subsequently removed from schedule in 2013 with no new additions. Delays in communication with regards to Initiative offerings and results reporting have hampered LDCs abilities to engage customers and promote participation. Province wide advertising has provided limited value due to inconsistency and non-specific messaging.

Work to revitalize and increase the effectiveness and breadth of the Initiatives through the Residential Program needs to be a high priority. There are opportunities within the Residential marketplace that need to be identified, developed and offered to customers. A revised home audit and other Initiatives which could engage an average residential customer could be considered. Increased control by the LDCs such as 100% attributable coupons for LDCs and/or LDC hosted exchange events may present an opportunity for improved savings.

#### 3.2.1.1 Appliance Retirement Initiative (Exhibit D)

**Initiative Activities/Progress:**

Guelph Hydro provided local marketing and customer support for this initiative as summarized in the following table.



<b>Initiatives/Activities</b>	<b>Timeframe</b>	<b>Progress</b>
Community Event: - Guelph Firefighters vs. Maple Leafs Alumni	<b>Q1</b>	- interactive promotion to encourage FFP participation - very effective, will be repeated in 2013
On-Bus Advertisement	<b>Q1 – Q4</b>	- effective in creating phone calls during the high purchase seasons for appliance replacement
Community Events: - Multi-cultural Fest - Ribfest - Fall Home show	<b>Q2, Q3</b>	- highest attended community events, excellent engagement and program education
Newspaper Advertisements	<b>Q1 - Q4</b>	- dedicated advertisements for FFP in community focused papers
Phone System	<b>Q2 – Q4</b>	- dedicated messaging for FFP
Banner	<b>Q1-Q4</b>	- effective for internal and external events
Brochures	<b>Q1 - Q4</b>	- fold with other programs and tips - 2 different sets
FFP buckslips	<b>Q3-Q4</b>	- FFP dedicated double-sided handouts for use at all community outreach events
FFP magnets	<b>Q2-Q3</b>	- FFP dedicated fridge magnets for use at all community outreach events
Fall Retailer Events	<b>Q4</b>	- 4 locations - very successful, joint effort with other initiatives
Social Media	<b>Q1-Q4</b>	- using Twitter to promote FFP has resulted in re-tweets and program inquiries

Guelph Hydro incorporated a FFP magnet program with new appliance retailers to have the magnets on all the new Energy Star fridges and freezers, so that consumers were reminded to call Guelph Hydro / saveONenergy for their pick-up.

**Additional Comments:**

- With the increase in appliance age to 20 years in 2013, many LDCs increased marketing and outreach throughout 2012 in an effort to increase uptake and achieve savings.
- Due to the duration of the program, and the revised eligibility requirements to a minimum of 20 years old, this Initiative appears to have reached market saturation and has been under consideration for removal from the Portfolio.
- Rather than strictly remove this Initiative from the schedules, the OPA and LDCs could review what opportunities there are to include other measures such as stoves, dishwashers, washers and dryers. The framework of this Initiative may be a suitable foundation for a more holistic residential appliance retirement program. As such, the Residential portfolio could be strengthened through program evolution rather than weakened through diminished program offerings.
- As results are very responsive to province wide advertising OPA provincial marketing should continue to play a key role.
- The OPA and LDCs can continue working to establish partnerships with Independent retailers and municipalities.

**3.2.1.2 Appliance Exchange Initiative (Exhibit E)**

**Initiative Activities/Progress:**

GHESI provided some local marketing and customer support for this initiative.

**Additional Comments:**

- This Initiative, eligible measures and incentive amounts are influenced by the retail partner with no direct involvement from the LDCs. The restrictive, limited nature as well as occasional non-participation of local stores can diminish the savings potential for this Initiative.
- To date there has only been one retailer participant in the Appliance Exchange Initiative. The Fall events have not had retailer participation, therefore savings budgeted by the LDCs have not materialized.
- Evaluation, Measurement, and Verification (EMV) results indicated that the value of savings for retired room AC has dropped resulting in the retail participant not accepting window a/c's during the Spring 2013 event.

- Notification regarding retailer participation and eligible measures continues to be delayed. Improved communications will aid in appropriate resource allocation and marketing of the Initiative.
- This Initiative may benefit from the disengagement of the retailer and allowing LDCs to conduct these events, possibly as part of a larger community engagement effort, with the backing of ARCA for appliance removal.
- The initiative appears to require more promotion from retailers and LDCs.

### 3.2.1.3 HVAC Incentives Initiative (Exhibit B)

#### Initiative Activities/Progress:

Guelph Hydro provided local marketing and customer support for this initiative as summarized in the following table.

<b>Initiatives/Activities</b>	<b>Timeframe</b>	<b>Progress</b>
<i>On-Bus Advertisement</i>	<b>Q1 – Q4</b>	- <i>effective in generating phone calls during high purchase seasons for AC and furnace</i>
<i>Community Events:</i> - <i>Multi-cultural Fest</i> - <i>Ribfest</i> - <i>Fall Home Show</i>	<b>Q2, Q3</b>	- <i>highest attended city events, excellent engagement and program education</i>
<i>Banners</i>	<b>Q1-Q4</b>	- <i>very effective visual for internal and external events</i>
<i>Newspaper and Magazine Advertisements</i>	<b>Q1- Q4</b>	- <i>community driven newspaper and magazines, excellent accompaniment to AC replacements ads and fliers</i>
<i>Brochures</i>	<b>Q1 - Q4</b>	- <i>4 fold and 3 fold brochures for all outreach initiatives</i>
<i>Fall Retailer Events</i>	<b>Q4</b>	- <i>4 locations</i>  - <i>very successful, joint effort with other initiatives</i>

<i>HVAC Residential checklist</i>	<b>Q4</b>	- <i>checklist was very well received as n event handout, containing education &amp; tips on what to look for when hiring a contractor</i>
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**Additional Comments:**

- Incentive levels appear to be insufficient to prompt Participants to upgrade HVAC equipment prior to end of useful life. It is hoped that the introduction of an Air Miles incentive in 2013 may help with this.
- This Initiative is contractor driven with LDCs responsible for marketing efforts to customers. More engagement with the HVAC contractor channel should be undertaken to drive a higher proportion of furnace and CAC sales to eligible units.
- Channel partners require timeliness of the Rebate process to maintain a positive relationship between consumers, contractors, the OPA, and the participating LDC. Due to a contracting delay no applications were processed from approximately the end of October 2012 to February 2013.
- LDC HVAC reports have been delayed and are not as complete and accurate as are required by LDCs to make adjustments to their marketing strategies.
- In an effort to build capacity, mandatory training has been instituted for all participating HVAC contractors. This may present too much of a barrier for participation by some contractors as the application process already presents a burden to contractor sales. It has been noted that there are approximately 4,500-5,000 HVAC contractors in the Province, however only 1,500 are participating in program.
- There are cases where non-participating contractors are offering their own incentives (by discounting their installations to match value of the OPA incentive) to make the sale. As this occurs outside of the Initiative, these installations should be attributed to the appropriate LDC.

**3.2.1.4 Conservation Instant Coupon Initiative (Exhibit A)**

**Initiative Activities/Progress:**

Guelph Hydro provided local marketing and customer support for this initiative as summarized in the following table.

<b><i>Initiatives/Activities</i></b>	<b><i>Timeframe</i></b>	<b><i>Progress</i></b>
<i>Mass coupons, Brochures</i>	<b>Q1 – Q4</b>	- <i>effective during the high purchase seasons</i> - <i>brochures provided customers with</i>

		<i>checklists to ensure that they utilized their coupons</i>
<i>Retail Events:</i> - Home Depot - Home Hardware (2 locations) - TSC	<b>Q3-Q4</b>	- <i>distribution on site</i> - <i>having representatives assist customers in their purchase decisions and explaining the coupon redemption process definitely helped increase the numbers</i>
<i>Mass Press Release</i>	<b>Q3</b>	- <i>picked up by newspaper, local radio and television news</i>
<i>Social Media</i>	<b>Q1-Q4</b>	- <i>used Twitter to distribute the link for print your own coupons</i>
<i>Community Events:</i> - <i>Multicultural Fest</i> - <i>Ribfest</i> <i>Fall Home Show</i>	<b>Q2 – Q4</b>	- <i>mass distribution of printed coupons at all of the these events</i> - <i>fortunate that the fall home show coincided with the coupon events in order to direct traffic directly to participating stores</i>

**Additional Comments:**

- This Initiative was ineffective for most of 2012 as the Instant coupons (annual) were not available to consumers until September 2012. As such, savings budgeted by LDCs did not materialize.
- The timeframe for retailer submission of redeemed coupons vary from retailer to retailer and in some cases has been lengthy. The delays and incomplete results reporting limits the ability to react and respond to Initiative performance or changes in consumer behaviour. This also resulted in the delayed launch of the Initiative in 2012.
- Coupon booklets were not printed and mailed out in 2012. As such, coupons were not widely available to consumers without the ability to download and print them.
- Without Provincial coupon distribution, and delay in Initiative launch, consumers may not have been aware of the online coupons. This Initiative could benefit from provincial marketing as a substitute to distribution.
- LDCs should be able to custom code all coupons to provide 100% allocation and push specific coupons based on localized needs.

- The product list could be distinctive from the Bi-Annual Retailer Event Initiative in order to gain more consumer interest and uptake.
- Program evolution, including new products and review of incentive pricing for the coupon Initiatives, should be a regular activity to ensure continued consumer interest.

### ***3.2.1.5 Bi-Annual Retailer Event Initiative (Exhibit C)***

#### **Initiative Activities/Progress:**

Guelph Hydro participated in more events in 2012 compared to 2011. Please refer to section 3.1.1.4 for more details.

Based on the success of these events, Guelph Hydro plans to continue participation with these events in 2013 and beyond. Having a knowledgeable and well-trained staff presence at the stores resulted in a significant increase in coupon redemption during the retailer events.

#### **Additional Comments:**

- This Initiative is strongly influenced by the retail participants.
- Limited engagement of local retailers can restrict the savings potential for this Initiative.
- The Product list has changed very little over the past four years.
- Program evolution, including new products and a review of incentive pricing for the coupon Initiatives, must be a regular activity to ensure continued consumer interest.
- The Product list could be distinctive from the Conservation Instant Coupon Initiative in order to gain more consumer interest and uptake.
- A review conducted by the Residential Working Group in Q4 2011 identified three areas of need for Initiative evolution: 1) introduction of product focused marketing; 2) enhanced product selection; and 3) improved training for retailers as retail staff tend not to be knowledgeable regarding the products or promotion.
- LDCs should be able to custom code all coupons to provide 100% allocation and push specific coupons based on localized needs.
- Communications regarding retailer participation continues to be delayed. Improved communications will aid in appropriate resource allocation and marketing of the Initiative.
- This Initiative may benefit from a more exclusive relationship with a retailer appropriate to the program. There should be a value proposition for both the retailer and LDC.

### **3.2.1.6 Retailer Co-op**

#### **Initiative Activities/Progress:**

Guelph Hydro was unable to participate in retailer co-op events in 2012 due to limited resources.

#### **Additional Comments:**

- This is a retailer Initiative with no direct benefit to the LDCs.
- Limited engagement of local retailers can restrict the savings potential for this Initiative.
- The availability of retailer and/or LDC staff with product knowledge and the ability to conduct demonstration in store during the events would be an asset. This could be a valuable role for LDCs, however many LDCs are limited by available resources and unable to participate.

### **3.2.1.7 New Construction Program (Schedule B-2)**

#### **Initiative Activities/Progress:**

Guelph Hydro expects to be more active in presenting this initiative to potential participants in 2013. As the program was not well received in 2011, in 2012 it has undergone a review and rebuild in an attempt to improve participation.

Guelph Hydro expects to offer this program to customers in 2013.

#### **Additional Comments:**

- This Initiative provides incentives to home builders for incorporating energy efficiency into their buildings. To support this, LDCs need to provide education to the consumers regarding the importance of choosing the energy efficient builder upgrade options without an immediate benefit to the consumer.
- Following limited participation in 2011, the application process was revisited in 2012 to streamline administration in response to builder feedback. Participation levels are expected to grow but there will be a lag to when results materialize as homes pre-approved could take a year or more to be completed.
- Administrative requirements, in particular individual home modeling, must align with perceived stakeholder payback. As per the Electricity Distributors Association (“EDA”) Working Groups, changes are being processed through change management for 2012. However, the lengthy change management process has resulted in continued non-participation from builders.

### 3.2.1.8 Residential Demand Response Program (Schedule B-3)

#### Initiative Activities/Progress:

Guelph Hydro provided local marketing and customer support for the **peaksaverPLUS™** initiative as summarized in the following table.

<b>Initiatives/Activities</b>	<b>Timeframe</b>	<b>Progress</b>
<i>Community Events:</i> - Ribfest - Fall Home Show	<b>Q3-Q4</b>	- best attended events - utilized for enrolment into peaksaverPLUS
<i>Retailer Participation</i> -Fall Retailer events	<b>Q4</b>	- these events were used for enrolment into peaksaverPLUS
<i>Phone System, Website</i>	<b>Q1 – Q4</b>	- recording on Guelph Hydro's telephone system promoting enrolment into peaksaverPLUS
<i>Banner</i>	<b>Q3</b>	- effective branding for internal and external events
<i>Website</i>	<b>Q2-Q4</b>	- encouraging customers to enroll

#### **Status of Guelph Hydro's peaksaverPLUS™ Program Delivery:**

As noted in Guelph Hydro's 2011 CDM Annual Report, Guelph Hydro chose to include a unique feature which exceeded the minimum functional specification of the Advanced Metering Infrastructure (AMI) initiative in its Smart Meter deployment. This feature was a second communication chip known as a "Zigbee" chip, which permits communication with Zigbee-compliant devices, such as In Home Displays (IHD) or programmable thermostats inside the home, through the AMI communication network. This was done several years in advance of the current CDM program, in anticipation of the future need to support CDM programs through communication with Zigbee-enabled devices inside the home.

In 2012 Guelph Hydro finalized its evaluation and selection of an IHD following bench testing of a variety of devices interfacing with a Zigbee enabled smart meter in conjunction with the AMI back-office software. Primary considerations in device testing and selection were customer engagement potential (offering the consumer an engagement experience that would survive the initial IHD novelty factor for a



more sustained customer behavioral change), and device stability (maintaining smart meter - IHD pairing and its automatic restoration in the event of a loss of device pairing).

In 2011 Guelph Hydro determined that while the existing AMI back-office software was functional and met the basic program delivery requirements for a small pilot project, it was not scalable to manage a larger deployment. In 2012 Guelph Hydro worked with its AMI vendor to address some of these concerns through the completion of a significant upgrade of its AMI Home Area Network (HAN) Communication Manager (HCM) software.

In Guelph Hydro's 2011 CDM Annual Report Guelph Hydro stated "*The requirements to properly investigate and address concerns such as those noted above has led GHESI to realize that the real implementation of the **peaksaverPLUS™** program complete with functional IHD could not be delivered to market until mid or late 2013. This anticipated almost 2-year delay represents a noticeable impact to GHESI's forecasted energy and demand savings identified in GHESI's CDM Strategy – almost 40% of the anticipated program enrollment was forecast for the 2011-2012 timeframe.*" The experiences in working through technology issues in 2012 reinforce the implementation timing assessment of the 2011 report.

In light of the implementation delays, Guelph Hydro took the proactive approach of beginning customer pre-enrolment registration into the **peaksaverPLUS™** program. Due to the unique customer focused capabilities of the IHD, we know that many customers are very excited for the implementation of this program.

When the program is fully launched to market, GHESI does anticipate that the delays in program delivery will have resulted in an improved program offering, customer experience, and ideally program uptake and behavioral change. Guelph Hydro anticipates that an IHD with a strong customer connection will be an excellent vehicle to help promote the **peaksaverPLUS™** program, and will somewhat mitigate the impact of the deployment delay.

**Additional Comments:**

- The schedule for **peaksaverPLUS™** was posted in August 2011, but this did not provide adequate time for product procurement for 2011, and part of 2012. The product procurement process uncovered that the In Home Display units that communicate with installed smart meter technology were still in development and not ready for market deployment. Consequently, LDCs could not be in market with the **peaksaverPLUS™** program until 2012, or later, which has resulted in delayed savings.
- Smart Meters installed by most LDCs do not have the capability to communicate directly to an In Home Display. When proposing technical Initiatives that rely on existing LDC hardware or technology there should be an extensive consultative process.
- Introduction of new technology requires incentives for the development of such technology. Appropriate lead times for LDC analysis and assessment, product procurement, and testing and integration into the Smart Meter environment are also required. Making seemingly minor changes to provincial technical specifications can create significant issues when all LDCs attempt to implement the solution in their individual environments.

- The variable funding associated with installing an advanced load controllable thermostat or load control switch with an advanced capability In Home Display is not sufficient when considering the back-office software implementation and annual operating costs.
- This is the main Initiative within the Residential portfolio that drives savings for LDCs.
- Given the different LDCs smart meter environments, and needs, each LDC is positioning the Initiative slightly different. As such, greater program flexibility is required to address unique LDC needs.
- Province wide marketing needs to be sensitive to the variations of the Initiative and provide solid, consistent messaging.
- There currently is not an avenue for participants without the ability to provide demand response capabilities to obtain an IHD and gain energy saving benefits.

### 3.2.2 COMMERCIAL AND INSTITUTIONAL PROGRAM

**Description:** Provides commercial, institutional, agricultural and industrial organizations with energy-efficiency programs to help reduce their electrical costs while helping Ontario defer the need to build new generation and reduce its environmental footprint. Programs to help fund energy audits, to replace energy-wasting equipment or to pursue new construction that exceed our existing codes and standards. Businesses can also pursue incentives for controlling and reducing their electricity demand at specific times.

**Targeted Customer Type(s):** Commercial, Institutional, Agricultural, Multi-family buildings, Industrial

**Objective:** Designed to assist building owners and operators as well as tenants and occupants in achieving demand and energy savings, and to facilitate a culture of conservation among these communities as well as the supply chains which serve them.

**Discussion:**

Throughout 2011 and 2012 the Commercial and Institutional (C&I) Working Group has strived to enhance the existing C&I programs and rectify identified program and system deficiencies. This has proven to be a challenging undertaking, normally taking months to complete sometimes relatively minor changes due to the current CDM framework. Overbuilt governance, numerous initiative requirements, complex program structure and lengthy change management have restricted growth without providing the anticipated improved Measurement and Verification results. In addition, Evaluation, Measurement and Verification (EM&V) has not yet achieved transparency. LDCs are held accountable for these results yet are mostly completely removed from the process.

LDC program management has been hampered by varying rule interpretation, limited marketing ability, a somewhat inflexible online system of checks and balances and revolving OPA support personnel.

Despite these challenges the C&I Working Group, working in cooperation with the OPA, have managed to iron out many of the issues which could be rectified. One particular accomplishment of 2012 was the advent of the expedited change management as means to accelerate certain program changes.

Looking ahead there is minimal opportunity to make valuable changes to the current program suite and have these changes reflected in LDC 2014 results. LDCs and the OPA should look beyond the current Initiatives and work to launch new programs, built on the strengths of the 2011-2014 programs, which will meet the needs of the industry and consumers.

### **3.2.2.1 Efficiency: Equipment Replacement Incentive (ERII) (Schedule C-2)**

#### **Initiative Activities/Progress:**

Guelph Hydro provided local marketing and customer support for this initiative as summarized in the following table.

On a first come, first served basis, in 2012 Guelph Hydro made metering equipment available to potential ERII participants, at no charge to the customer. This type of metering equipment supports the pre- and post-project measurements that are required to substantiate some ERII projects. This effort was undertaken as a way to remove potential barriers to program participation, with extremely positive feedback from customers using the service.

<b><i>Initiatives/Activities</i></b>	<b><i>Timeframe</i></b>	<b><i>Progress</i></b>
<i>Proactive Sales Calls</i>	<b><i>Q1 – Q4</i></b>	<i>- regular proactive and reactive direct sales calls by Key Accounts Manager and Energy Services Representatives to sell energy efficiency projects</i>
<i>Business Events:</i> <i>- Retrofit Workshop</i> <i>- Chamber of Commerce Event</i> <i>- Lunch &amp; Learns</i> <i>- Formal Cheque Presentations</i>	<b><i>Q1 - Q4</i></b>	<i>- events targeting the business community as well as institutional and industrial customers to promote saveONenergy programs, incentive potential and local success stories</i>  <i>- cheque presentations make great success stories in the local papers and excellent case studies to share with other customers</i>
<i>Community &amp; Retailer Events:</i>	<b><i>Q1 – Q4</i></b>	<i>- while these events primarily focused on the Consumer segment, collateral materials were available for distribution and</i>

- <i>Multi-cultural Fest</i> - <i>Ribfest</i> - <i>Habitat for Humanity</i> - <i>Fall Energy Fair</i>		<i>conversations were had with some customers on the Business program offerings</i>
<i>Advertising in Local Business Publications</i>	<b>Q1 - Q4</b>	- <i>Chamber of Commerce, Business Ventures, Moving Business Forward, etc business program advertising</i>
<i>Case Studies, Matte Articles, Press Releases</i>	<b>Q1 – Q4</b>	- <i>program promotion and case studies to showcase success stories beyond the “low hanging fruit” of lighting projects</i>
<i>CRM Applicant Representative Training</i>	<b>Q4</b>	- <i>personalized CRM orientation / training for customers, their agents and applicant reps to provide improved CRM self-service and minimize the number of application entry and administration issues</i>
<i>Brochures</i> <i>Laminated Work Sheets</i>	<b>Q1-Q4</b>	- <i>expanded customer education and support offerings, including laminated work sheets for channel partners to utilize in their daily business operations, with excellent feedback</i>

**Additional Comments:**

- It appears that in 2012 the marketplace now largely understands the programs, with a large proportion of LDC savings attributed to ERIL.
- The centralized process review used for 2012 project payment has been streamlined by the OPA and payments for projects were greatly improved – faster and more consistent when compared to 2011.
- Capability building programs from Industrial programs have had very positive contributions to ERIL program.
- This Initiative is limited by the state of the economy and the ability of commercial/institutional facility to complete capital upgrades.
- A number of customer facing issues in CRM (the OPA centralized application system) have been resolved; however key LDC administrative back office processing issues continue to be a challenge.

- Applicants and Applicant Representatives continue to express dissatisfaction and difficulty with the online application system. This issue has been addressed by LDCs through application training workshops, Key Account Managers, channel partner/contractor training and LDC staff acting as customer Applicant Representatives. Although this has been an effective method of overcoming these issues and encouraging submissions, it also reflects on the complexity and time consuming nature of the application process. As such, Applicant Representatives continue to influence the majority of applications submitted. Continued development of Channel Partners is essential to program success.
- Lighting is still the most popular measure. Other market sectors are not as engaged yet, specifically the mechanical world. There continues to be significant barriers to program participation from HVAC (Unitary AC) and compressed air channel partners.
- Prescriptive and Engineered worksheets provide a much needed simplified application process for customers. However, the eligible measures need to be updated and expanded in both technology and incentive amounts to address changing product costs and evolution of the marketplace.
- Expanding the capacity of the engineered applications can offer customers an opportunity to maximize savings and incentives. Recognizing this, Toronto Hydro and London Hydro worked together to develop and provide the OPA with compressed air engineered worksheets for inclusion in the Initiative in Q3, 2012. To date, these have not been accepted and provided to LDCs for use.
- An identified deficiency in the various renditions of the equipment replacement is the “hard stop” of the program as of a specific date. Without a streamlined transition into a new program, many customers become frustrated and chose not to participate. LDCs struggle to repair customer and channel partner relationships and gain momentum in the market place once again.
- While the Ministerial Directive regarding a "2015 extension" provides continuity of conservation programs for participants, incomplete and unclear direction on LDC administrative funding could result in many LDCs ‘ramping down’ programs in 2015. The establishment of defined administrative or program delivery funding for 2015 is required to avoid a “stop and start” process.

### **3.2.2.2 Direct Install Initiative (DII) (Schedule C-3)**

#### **Initiative Activities/Progress:**

Guelph Hydro provided local marketing and customer support for this initiative as summarized in the following table.

<b><i>Initiatives/Activities</i></b>	<b><i>Timeframe</i></b>	<b><i>Progress</i></b>
<i>Proactive door-to-door sales calls</i>	<b><i>Q1-Q4</i></b>	<i>- Customers canvassed door-to-door for free audit and no-charge measures</i>

<i>Call centre</i>	<b>Q1-Q4</b>	- <i>Outbound call centre calls as well as inbound calls received through various marketing efforts &amp; word-of-mouth</i>
<i>Business Events:</i> - <i>Retrofit Workshop</i>	<b>Q1-Q4</b>	- <i>events targeting the business community to promote saveONenergy programs including Direct Install Lighting Initiative (Small Business Lighting)</i>
<i>Community Events:</i> - <i>Multi-cultural Fest</i> - <i>Ribfest</i> - <i>Fall home Show</i> - <i>Fall Energy Fair</i>	<b>Q2, Q3</b>	- <i>highest attended community events, excellent engagement and program education</i>  - <i>collateral materials available for distribution and conversations were had with some customers on the Business program offerings</i>
<i>On-Bus Advertisement</i>	<b>Q1 – Q4</b>	- <i>another program promotion vehicle</i>
<i>Phone system</i>	<b>Q2 – Q4</b>	- <i>messaging to encouraging customers to enroll</i>
<i>Advertising in Local Business Publications</i>	<b>Q1- Q4</b>	- <i>Chamber of Commerce, Business Ventures, Moving Business Forward, etc business program advertising</i>
<i>Case Studies, Matte Articles, Press Releases</i>	<b>Q1 – Q4</b>	- <i>program promotion and case studies to showcase success stories and encourage enrollment</i>

The Power Savings Blitz and its successor Direct Install Lighting Initiative have been highly successful programs for Guelph Hydro since 2008. Guelph Hydro notes, however, that this program in its current form is a mature program, and may be close to end of life.

An analysis of market uptake of eligible participants since program inception has been described by program delivery agents as in the saturation range (35-40% uptake). Approximately 20% of potential participants had been dismissed from participation as their facilities already had energy efficient measures installed. An additional almost 20% of potential program participants indicated no interest in participating for a variety of reasons. For 2012 Guelph Hydro experienced a noticeable decline in participation, with the potential for this program in its current form to continue and achieve results greatly diminished.

**Additional Comments:**

- Successful execution of the previous rendition of this Initiative has resulted in diminished potential for the 2011-2014 Initiative in some LDC's territories.
- The inclusion of a standard incentive for additional measures increased project size and drove higher energy and demand savings results in some situations.
- Electrical contractor's margins have been reduced due to no labour rate increase, increase cost of materials, greater distances between retrofits, more door knocking required before a successful sale and no funding for lifts. This has led to a reduction in vendor channel participation in some regions.
- Ambiguity with regard to eligibility resulted in large lists of customers rejected following installation due to preserved ineligibility. Due to this, some LDCs were forced to carry considerable financial burden while this was worked through.
- The eligibility requirements have now been revamped and expanded however there has been limited communication and documentation of this to the marketplace.
- Currently LDCs are unable to offer these standard incentives to prior participants. The ability to return to prior participants and offer a standard incentive on the remaining measures has potential to provide additional energy and demand savings.

**3.2.2.3 Existing Building Commissioning Incentive Initiative (Schedule C-6)****Initiative Activities/Progress:**

GHESI did not actively pursue this initiative in 2012 but expects to more proactively market this program to customers in 2013.

**Additional Comments:**

- Initiative name does not properly describe the Initiative.
- There was minimal participation for this Initiative. It is suspected that the lack of participation in the program is a result of the Initiative being limited to space cooling and a limited window of opportunity (cooling season) for participation.
- Participation is mainly channel partner driven, however the particulars of the Initiative have presented a too significant of a barrier for many channel partners to participate.
- The customer expectation is that the program be expanded to include a broader range of measures for a more holistic approach to building recommissioning and chilled water systems used for other purposes should be made eligible and considered through Change Management.

- This initiative should be reviewed for incentive alignment with ERII, as currently a participant will not receive an incentive if the overall payback is less than 2 years.

### 3.2.2.4 New Construction and Major Renovation Initiative (HPNC) (Schedule C-4)

#### Initiative Activities/Progress:

Guelph Hydro expects to increase customer awareness of this program in 2013.

#### Additional Comments

- There is typically a long sales cycle for these types of projects, followed by a long project development cycle. As the program did not launch until mid-2011 and had limited participation, results did not appear in 2011. Minimum results are expected to appear in 2012. The majority of the results are expected in 2013-2014, with a reduced benefit to cumulative energy savings targets.
- With the release of the Ministerial Directive, facilities with a completion date near the end of 2014 currently have some security that they will be compensated for choosing efficient measures.
- Participant's estimated completion dates tend to be inaccurate and are usually 6 months longer. This could result in diminished savings towards target when facilities are not substantially completed by December 31, 2014.
- The custom application process requires considerable customer support and skilled LDC staff. As there has been no defined administrative funding beyond 2014, many LDCs are unsure how these project applications will be finalized.
- The effort required to participate through the custom stream exceeds the value of the incentive for many customers.
- This Initiative has a very low Net-to-Gross ratio, which results in half the proposed target savings being 'lost'.

### 3.2.2.5 Energy Audit Initiative

#### Initiative Activities/Progress:

Guelph Hydro provided local marketing and customer support for this initiative as summarized in the following table.

<i>Initiatives/Activities</i>	<i>Timeframe</i>	<i>Progress</i>
<i>Business Events:</i>	<i>Q3, Q4</i>	<i>- events targeting the business community as well as institutional and industrial</i>



<ul style="list-style-type: none"> <li>- Retrofit Workshop</li> <li>- Cheque Presentation</li> </ul>		<p>customers to promote saveONenergy programs, incentive potential and local success stories</p> <ul style="list-style-type: none"> <li>- a formal cheque presentation specific to a successful Audit Funding customer resulted in the story being picked up by several local news outlets</li> </ul>
<p>Community &amp; Retailer Events:</p> <ul style="list-style-type: none"> <li>- Multi-cultural Fest</li> <li>- Ribfest</li> <li>- Fall Home Show</li> <li>- Fall Energy Fair</li> </ul>	<p><b>Q1 – Q4</b></p>	<ul style="list-style-type: none"> <li>- while these events primarily focused on the Consumer segment, collateral materials were available for distribution and conversations were had with some customers on the Business program offerings</li> </ul>
<p>Advertising in Local Business Publications</p>	<p><b>Q1 - Q4</b></p>	<ul style="list-style-type: none"> <li>- Chamber of Commerce, Business Ventures, Moving Business Forward, etc business program advertising</li> </ul>
<p>Brochures</p>	<p><b>Q1 - Q4</b></p>	<ul style="list-style-type: none"> <li>- 4 fold and 3 fold brochures for all outreach initiatives</li> </ul>

**Additional Comments**

- Customer uptake was limited in 2011, however improved throughout 2012, particularly with the introduction of the new audit component for one system (i.e. compressed air).
- The energy audit Initiative is considered an ‘enabling’ Initiative and ‘feeds into’ other saveONenergy Initiatives.
- Audit reports from consultants vary considerably and in some cases, while they adhere to the Initiative requirements, do not provide value for the Participant. A standard template with specific energy saving calculation requirements should be considered, in order to better lead the participant to complete saveONenergy projects identified in the audit report.
- Customers look to the LDCs to recommend audit companies. A centralized prequalified list provided by the OPA may be beneficial.

- Participants are limited to one energy audit which restricts enabling and direction to the other Initiatives. This Initiative should be evaluated for additional customer participation when presented with a new scope of work.

### 3.2.3 INDUSTRIAL PROGRAM

**Description:** Large facilities are discovering the benefits of energy efficiency through the Industrial Program Initiatives which are designed to help identify and promote energy saving opportunities. They includes financial incentives and technical expertise to help organizations modernize systems for enhanced productivity and product quality, as wells as provide a substantial boost to energy productivity. This allows facilities to take control of their energy so they can create long-term competitive energy advantages which reach across their organization.

**Targeted Customer Type(s):** Industrial, Commercial, Institutional, Agricultural

**Objective:** To provide incentives to both existing and new industrial customers to motivate the installation of energy efficient measures, as well as to promote participation in demand management.

**Discussion:**

The Industrial Program Portfolio has been able to provide valuable resources such as Energy Managers and enabling Engineering Studies to large facilities. The Engineering Studies in particular provide a unique opportunity for a customer to complete a comprehensive analysis of an energy intensive process that they would not otherwise be able to undertake. Energy Managers provide customers with a skilled individual whose only role is to assist them with conservation initiatives. To date these Energy Managers have played a key role in customer participation.

Due to the size, scope and long lead time of these Initiatives and associated projects, the Ministerial Directive provides some security for the continuation of the conservation programs and associated compensation for the participant; however the program structure is problematic as the subsequent savings would not be attributed to any LDC target.

Extensive legal documents, complex program structure and lengthy change management have restricted the change and growth of the Industrial Portfolio. While the expedited change management has benefited the Commercial Portfolio, the Industrial Portfolio has not seen the same results due to the narrow scope of the process. For 2013, a change to the threshold for small capital projects and a new small capital project agreement are expected to improve the number of projects and savings achieved within the Process & Systems Upgrades Initiative (PSUI). Likewise, a decision to proceed with natural gas load displacement generation projects will also increase uptake, although results may not be counted towards LDC targets due to in-service dates realistically beyond 2014. Looking ahead there is minimal opportunity to make additional valuable changes to the current program suite and have these changes reflected in LDC 2014 results.

### **3.2.3.1 Process & Systems Upgrades Initiative (PSUI) (Schedule D-1)**

#### **Initiative Activities/Progress:**

Guelph Hydro provided local marketing and customer support for this initiative.

As noted in Guelph Hydro's 2011 CDM Annual Report, Guelph Hydro had preliminary discussions with a large potential on-site Load Displacement (Co-Generation) project late in 2011. Discussions and support for this potential project continued into 2012, with the completion of a Preliminary Engineering Study (PES) in Q2 2012, as well the completion of a comprehensive Detailed Engineering Study (DES) in Q3 2012.

Late in 2012 it became apparent that gas fired load displacement projects would be put on hold, in spite of the completion and acceptance of both the PES and DES. Lack of clear communication around the actual status of the project resulted in a very upset customer, as the project at year end was in a holding pattern without a direction forward.

This project has the potential to provide a significant component of Guelph Hydro's 2014 demand target. Achievement of Guelph Hydro's 2014 demand target will be severely impacted should the project not proceed. At the end of 2012, Guelph Hydro anticipates that even if the project was ultimately given approval to proceed, the long project implementation timeframe will make it difficult for it to be built, commissioned and put in service in time for Guelph Hydro's December 2014 demand target deadline.

#### **Additional Comments:**

- Approximately 100 engineering study applications have been submitted. This is a strong indication that there is the potential for large projects with corresponding energy savings. Most of these studies have been initiated through the Energy Manager and KAM resources.
- This Initiative is limited by the state of the economy and the ability of a facility to complete large capital upgrades.
- There is typically a long sales cycle for these projects, and then a long project development cycle. This is reflected in the limited results reported in 2012. The majority of the results are expected in 2013-2014, with a much reduced benefit to cumulative energy savings targets.
- Delays with processing funding payments have caused delayed payments to Participants beyond contract requirements. In some cases, LDCs have developed a separate side agreement between the LDC and Participant acknowledging that the Participant cannot be paid until the funds are received.
- The contract required for PSUI is a lengthy and complicated document. A key to making PSUI successful is a new agreement for 'small' projects which is a simplified with less onerous conditions for the customer.
- To partially address this, changes were made to the ERII Initiative which allowed smaller projects to be directed to the Commercial stream. Most industrial projects to-date have been submitted as ERII projects due to less onerous contract and M&V requirements.

- A business case was submitted by the Industrial Working Group in July 2012 which would change the upper limit for a small project from 700 MWh to 1 million dollars in incentives. This would allow more projects to be eligible for the new small capital project agreement and increase participant uptake, while still protecting the ratepayer. To date this change has not been implemented.
- While there is considerable customer interest in on-site Load Displacement (Co-Generation) projects, in 2012 the OPA was accepting waste heat/waste fuel projects only. Natural gas generation projects were on hold awaiting a decision on whether PSUI will fund these types of projects. In June 2013, a decision was made to allow natural gas load displacement generation projects to proceed under PSUI. It is expected that a number of projects will proceed although results may not be counted towards LDC targets due to in-service dates beyond 2014.

### ***3.2.3.2 Monitoring & Targeting Initiative (Schedule D-2)***

#### **Initiative Activities/Progress:**

Guelph Hydro provided limited local marketing and support for this initiative in 2012.

#### **Additional Comments:**

- The M&T initiative is targeted at larger customers with the capacity to review the M&T data. This review requires the customer facility to employ an Energy Manager, or a person with equivalent qualifications, which has been a barrier for some customers. As such, a limited number of applications have been received to date.
- The savings target required for this Initiative can present a significant challenge for smaller customers.
- Through the change management process in 2013, changes are being made to ERII to allow smaller facilities to employ M&T systems.

### ***3.2.3.3 Energy Manager Initiative (Schedule D-3)***

#### **Initiative Activities/Progress:**

As noted in Guelph Hydro's 2011 CDM Annual Report, Guelph Hydro's 2010 CDM Strategy document indicated Guelph Hydro's intent to pursue funding for a Roving Energy Manager (REM) to assist Industrial customers in identifying and implementing energy efficiency projects within their facilities. However, as described in section 3.2.3.4, in 2011 and 2012 Guelph Hydro was unsuccessful in attracting Key Account Manager (KAM) support.

The skill set required of an Embedded Energy Manager (EEM) / REM is more specialized than a KAM, and based on the unsuccessful KAM search, Guelph Hydro expects a challenge in finding an individual with the

appropriate skill set willing to undertake the obligations of a short term contract and associated energy target.

Guelph Hydro intends to investigate REM support as it revisits the marketplace early in 2013 for Key Account Manager support.

**Additional Comments:**

- The Energy Managers have proven to be a popular and useful resource for larger customers. There are approximately 70 Embedded Energy Managers (EEMs) and 25 Roving Energy Managers (REMs) being utilized by customers across the province.
- LDCs that are too small to qualify for their own REM are teaming up with other utilities to hire an REM to be shared by the group of utilities.
- At the beginning, it took longer than expected to set up the energy manager application process and unclear communication resulted in marketing and implementation challenges for many LDCs.
- Some LDCs and Customers are reporting difficulties in hiring capable Roving and Embedded Energy Managers (REM/EEM), in some instances taking up to 7 months to have a resource in place.
- New energy managers require training, time to familiarize with facilities and staff and require time to establish “credibility”. Energy Managers started filling their pipeline with projects but few projects were implemented in 2012.
- Delays with processing EEM payments causing LDCs to delay payments to Participants beyond contract requirements.
- There have been a number of studies identified by Energy Managers and they have been able to build capacity and deliver energy saving projects within their respective large commercial/industrial facilities.
- Requirement that 30% of target must come from Non-incented projects is identified as an issue for most REMs, although final targets not due to 2013. Working group has proposed to remove this requirement for REM’s only as they are not resident full time at a customer facility to find the non-incented savings.
- A decision on extending funding for EM’s is required in 2013 for this important Initiative, which should continue beyond 2014, failing which these expert resources will be lost in favour of full-time employment elsewhere.

#### **3.2.3.4 Key Account Manager (Schedule D-4)**

##### **Initiative Activities/Progress:**

As noted in Guelph Hydro's 2011 CDM Annual Report, in Q2 2011 Guelph Hydro received approval for 50% funding of one part-time Key Account Manager (KAM). Guelph Hydro pursued hiring the 50% KAM during Q3 2011, with no success. This was based on the skill set being sought as well as the lack of qualified people interested in working under a short term contract.

In Q3 2011 GHESI hired an additional resource in the form of a full time Energy Services Representative (ESR), and between the ESR and other Guelph Hydro staff, customers were provided reactive KAM support through these individuals, on a part time basis.

In 2012 Guelph Hydro revisited the marketplace for a 50% KAM, again with limited success. A potential candidate was engaged, but following an unsuccessful trial period, the engagement was not extended.

Guelph Hydro intends to again revisit the marketplace early in 2013.

##### **Additional Comments**

- Customers appreciate dealing with a single contact to interface with an LDC, a resource that has both the technical and business background who can communicate easily with the customer and the LDC.
- Finding this type of skill set has been difficult. In addition, the short-term contract and associated energy targets discourage some skilled applicants resulting in longer lead times to acquire the right resource.
- This resource has been found by some LDCs to be of limited value due to the part-time nature of the position and limited funding. In addition, the position role has been too narrow in scope to provide assistance to the wider variety of projects LDCs may be struggling with.
- A decision on extending funding for KAM's is required in 2013 for this important Initiative, which should continue beyond 2014, failing which these expert resources will be lost in favour of full-time employment elsewhere.

#### **3.2.3.5 Demand Response 3 (D-6)**

##### **Initiative Activities/Progress:**

Guelph Hydro provided local marketing and customer support for this initiative.

Guelph Hydro has been very active in one on one discussions with companies that could be eligible to participate in DR3. As potential program participants worked with aggregators to enroll in DR3, Guelph

Hydro put a high priority on providing the necessary interval metering data or access to metering systems to remove or minimize potential barriers to participation.

**Additional Comments:**

- Until early 2013 program participants were not provided to LDCs on an individual customer basis due to contractual requirements with the aggregators. This limited LDCs' ability to effectively market to prospective participants and verify savings.
- No program improvements were made in 2012, however, the OPA accepted that prior program participants who renewed their DR3 contract within the 2011-2014 term would contribute to LDC targets.
- As of 2013, Aggregators are able to enter into contracts beyond 2014. This has permitted them to offer a more competitive contract price (5 year) than if limited to 1 or 2 year contracts.
- Metering and settlement requirements are expensive and complicated and can reduce customer compensation amounts, and present a barrier to smaller customers.
- Compensation amounts for new contracts and renewals have been reduced from the initial launch of this program (premium zones and 200 hour option have been discontinued), and subsequently there has been a corresponding decrease in renewal revenue.

### **3.2.4 LOW INCOME INITIATIVE (HOME ASSISTANCE PROGRAM) (Schedule E-1)**

**Initiative Activities/Progress:**

Guelph Hydro's primary focus for 2011-2012 program delivery was the continuation of successor CDM programs for those that were well known in the market and had significant customer connection (ie. ERIP/Retrofit, Power Savings Blitz/Small Business Lighting, The Great Refrigerator Roundup/Appliance Pickup, *peaksaver*®Extension/*peaksaver*PLUS™). Programs new to the market with limited previous customer engagement or expectation would be offered as Guelph Hydro's program understanding and capacity to implement evolved, and the new program's administration / delivery mechanisms matured. Guelph Hydro chose not to offer the Low Income Initiative (Home Assistance Program) in 2012, and continued to monitor the marketplace for resolution of issues such as those identified under "Additional Comments".

Guelph Hydro expects to offer this program to its customers in 2013.

**Additional Comments:**

- Awareness of the program amongst social agencies took time to develop. Benefits started to become evident in late 2012.
- Centralized payment processes were not developed in 2011. The payment process was established in 2012.

- The process for enrolling in social housing was complicated and time consuming. This was addressed in late 2012 and is expected to show benefits in 2013.
- The financial scope, complexity, and customer privacy requirements of this Initiative are challenging for LDCs and most have contracted this program out. This Initiative may benefit from an OPA contracted centralized delivery agent.

### **3.2.5 PRE-2011 PROGRAMS**

Savings were realized towards LDC's 2011-2014 target through pre-2011 programs. The targeted customer types, objectives, descriptions, and activities of these programs are detailed in Appendix B.



## **4 2012 LDC CDM Results**

### **4.1 Participation and Savings**

The following Table 1 details Guelph Hydro's program participation and associated savings by initiative by program year. Note that these results do not include the potential Demand Response (DR) program contributions, as 2012 DR program participation persistence cannot be guaranteed for the 2014 program year.

The subsequent Table 2 summarizes the Guelph Hydro's achievement by program, in "Gross", "Net", and "Contribution Towards 2014 Targets" categories.

The information used to populate Tables 1 and 2 was provided by the OPA through their OPA Annual CDM Report 2012 - Final Verified Results - Guelph Hydro Electric Systems Inc. document, as well as a separate 2012 Net and Gross Program Results at End User Level - Guelph Hydro Electric Systems Inc. table.



**Table 2: Summarized Program Results**

Program	Gross Savings		Net Savings		Contribution to Targets	
	2012 Incremental Peak Demand Savings (MW)	2012 Incremental Energy Savings (GWh)	2012 Incremental Peak Demand Savings (MW)	2012 Incremental Energy Savings (GWh)	Program-to-Date: Net Annual Peak Demand Savings (MW) in 2014	Program-to-Date: 2011-2014 Net Cumulative Energy Savings (GWh)
Consumer Program Total	0.06	0.16	0.29	0.88	0.81	9.08
Business Program Total	2.71	7.56	2.36	6.00	1.62	22.97
Industrial Program Total	0.00	0.00	0.00	0.00	0.60	14.82
Home Assistance Program Total	0.00	0.00	0.00	0.00	0.00	0.00
Pre-2011 Programs completed in 2011 Total	0.00	0.00	0.00	0.00	1.45	31.00
Other	2.30	1.19	2.30	1.19	2.30	3.57
Adjustments to Previous Year's Verified Results	0.16	1.23	0.10	0.88	0.10	3.52
<b>Total OPA Contracted Province-Wide CDM Programs</b>	<b>5.76</b>	<b>11.54</b>	<b>5.07</b>	<b>8.95</b>	<b>6.89</b>	<b>84.95</b>

## 4.2 Evaluation

The following program evaluation information was provided by the OPA through their August 30<sup>th</sup>, 2013 “Final 2012 EM&V Findings” document. It provides a summary of the 2012 EM&V findings for all of the evaluated saveONenergy initiatives.

### *Consumer Program Initiatives*

#### **Bi-Annual Coupons**

- 15% lower net savings due to a 15% lower net savings due to a change in the net-to gross factors (increased free-ridership, less participant behavior spillover, and less non-participant like spillover);
- Majority of participation, energy, & demand savings are from standard CFLs;
- 15% of net savings due to ~73,000 coupons for new LED measures.

#### **Annual Coupons**

- The number of coupons associated with the redemption of 2012 Annual Coupons was 90% lower than 2011 Instant Coupon Booklet. Key factors for the decrease include:
  - Shorter duration of available coupons (September 2012 – December 2012);
  - In 2012, only online coupons were available:
    - 2011 had both online coupons AND coupon mailing booklets.

#### **HVAC**

- Small decrease (10%) in per unit savings assumptions for furnace with ECM due to change in 2012 customer mix and furnace fan usage;
- Small increase (10%) in free-ridership related to the furnace with ECM measure;
- Participation remains relatively steady once 2011 true-up values are included.

#### **Appliance Retirement**

- Decrease in 2012 participation by 39% compared to 2011;
- In-site metering provided updated per unit assumptions:
  - Small decrease (3.5%) in savings for refrigerators; and
  - Sizeable increase (17.5%) in savings for freezers.

#### **Appliance Exchange**

- Increase of 30% for exchanged dehumidifiers over 2011, leading to an increase of 4% in overall participation;
- Higher per unit savings for dehumidifiers drove the overall increase in 2012 savings.

#### **PeaksaverPLUS**

- Province-wide per-unit ex ante estimates for a 1-in-10 August peak day were determined to be 0.50 kW for residential CACs and 0.64 kW for small commercial CACs;

- Evaluation to date has indicated savings from in-home displays (IHDs) are not statistically significant (in and around zero):
  - However, since 2012 evaluation did not include full year analysis (specifically the summer months), these results have been deemed inconclusive;
- The IHD offer had a positive influence on enrollment and re-enrollment with between 20 to 35% of new enrollees said they wouldn't have enrolled without the IHD offer.

#### **Residential New Construction**

- All projects are opting for the prescriptive or performance path - there have been no custom project applications to date.

#### ***Business Program Initiatives***

##### **Retrofit**

- Reported savings for prescriptive lighting projects continue to be overstated:
  - Verified wattage reductions were 15% higher than assumed; and
  - Verified operating hours were 11% higher than assumed;
- A lower realization rate in the engineered measure track can be partially explained by overstated lighting operation hour assumptions reported on the application;
- Net-to-gross ratios for the initiatives were above 75% in 2012, which is consistent with 2011.

##### **Small Business Lighting**

- Reported hours of usage continue to be inaccurate - only 12% of site visits had verified annual hours of use within +/-10% of the assumed value;
- The saturation of eligible customers and preferred business types are resulting in participation from building types that may not fully operate during the summer peak period:
  - This trend contributes to lower realization rates for demand savings in 2012;
- Due to changing regulations in lighting measures, the assumed baseline technology will eventually be phased out. This regulation impacts the persistence of savings over the lifetime of lighting measures.

##### **Existing Building Commissioning**

- There were no applications in 2012;
- Market feedback suggests that EBC's focus on chilled-water space-cooling systems may be too narrow, and participation could be expanded by incenting a wider range of measures.

##### **New Construction**

- Custom projects account for 66% of program savings, with the remainder coming from the prescriptive track.

##### **Audit Funding Program**

- Through Audit Funding, 280 projects were completed in 2012 based on recommendations from the auditors, resulting in 1.4 MW and 7 GWh of Program Enabled Savings;

- Office buildings represented the largest portion of applicants for 2012.

### ***Industrial Program Initiatives***

#### **Process and Systems Upgrade Initiative**

- Energy managers are seen as important drivers of Program Enabled savings projects:
  - 88% of survey respondents indicated that the assistance provided by energy managers was “somewhat” or “very” important to implementing projects;
- Energy Managers indicated that additional support (additional training and guides) may further help influence the adoption of energy efficiency measures by the participants;
- Documentation for Program Enabled Savings projects varied substantially by LDC. More guidance on documentation requirements would be beneficial to all parties.

#### **DR3**

- 2012 saw improvements in the performance of DR3 participants resulting higher ex ante realization rates, particularly for the industrial participants.

### ***Low Income Program Initiatives***

#### **Home Assistance Program**

- Participation in the initiative ramped up in 2012, with over 5,000 homes participating in the initiative;
- Majority of energy savings (62%) comes from lighting measures, while 21% of energy savings resulting from refrigerator and freezer replacements.

### 4.3 Spending

The following Table 3 details Guelph Hydro’s program 2012 program delivery and administration expenses, as well as participant based funding, participant incentives and capability building funding. The recorded participant incentives only include incentives administered by Guelph Hydro, except for customer incentives provided through the Efficiency Equipment Retrofit Incentive Initiative (ERII) Head Office Model to participants located in Guelph Hydro's service area.

The subsequent Table 4 summarizes Guelph Hydro’s cumulative 2011-2012 program spending and related participant incentives.

**Table 3: 2012 Spending**

	Initiative	Program Administration Budget (PAB)	Participant Based Funding (PBF)	Participant Incentives (PI)	Capability Building Funding (CBF)	TOTAL
	<b>Consumer Program</b>					
1	Appliance Retirement	\$39,115.77	\$0.00	\$0.00	\$0.00	\$39,115.77
2	Appliance Exchange	\$23,717.52	\$0.00	\$0.00	\$0.00	\$23,717.52
3	HVAC Incentives	\$38,443.27	\$0.00	\$0.00	\$0.00	\$38,443.27
4	Conservation Instant Coupon Booklet	\$35,899.27	\$0.00	\$0.00	\$0.00	\$35,899.27
5	Bi-Annual Retailer Event	\$23,630.52	\$0.00	\$0.00	\$0.00	\$23,630.52
6	Retailer Co-op	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	Residential Demand Response	\$92,132.68	\$0.00	\$0.00	\$0.00	\$92,132.68
10	New Construction Program	\$38,730.27	\$0.00	\$0.00	\$0.00	\$38,730.27

<b>Business Program</b>						
11	Efficiency: Equipment Replacement	\$207,021.48	\$0.00	\$445,942.37	\$0.00	\$652,963.85
12	Direct Installed Lighting	\$69,335.65	\$41,055.00	\$175,181.75	\$0.00	\$285,572.40
14	Existing Building Commissioning Incentive	\$13,116.65	\$0.00	\$0.00	\$0.00	\$13,116.65
15	New Construction and Major Renovation Initiative	\$22,399.65	\$0.00	\$0.00	\$0.00	\$22,399.65
16	Energy Audit	\$46,064.15	\$0.00	\$38,285.50	\$0.00	\$84,349.65
17	Small Commercial Demand Response (part of the Residential program schedule)	see #7	see #7	see #7	see #7	see #7
19	Demand Response 3 (part of the Industrial program schedule)	see #26	see #26	see #26	see #26	see #26
<b>Industrial Program</b>						
20	Process & System Upgrades					
	a) preliminary engineering study	\$9,113.09	\$0.00	\$10,000.00	\$0.00	\$19,113.09
	b) detailed engineering study	\$7,838.09	\$0.00	\$0.00	\$0.00	\$7,838.09
	c) program incentive	\$3,565.58	\$0.00	\$0.00	\$0.00	\$3,565.58
21	Monitoring & Targeting	\$2,290.58	\$0.00	\$0.00	\$0.00	\$2,290.58
22	Energy Manager	\$2,090.58	\$0.00	\$0.00	\$0.00	\$2,090.58
23	Key Account Manager ("KAM")	\$8,767.83	\$0.00	\$0.00	\$0.00	\$8,767.83
24	Efficiency: Equipment Replacement Incentive (part of the C&I program schedule)	see #11	see #11	see #11	see #11	see #11



26	Demand Response 3	\$17,136.58	\$0.00	\$0.00	\$0.00	\$17,136.58
	<b>Home Assistance Program</b>					
27	Home Assistance Program	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	<b>Pre 2011 Programs</b>					
28	Electricity Retrofit Incentive Program	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
29	High Performance New Construction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
30	Toronto Comprehensive	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
31	Multifamily Energy Efficiency Rebates	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
32	Data Centre Incentive Program	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
33	EnWin Green Suites	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	<b>Initiatives Not in Market</b>					
8	Midstream Electronics	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	Midstream Pool Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	Demand Service Space Cooling	\$13,073.15	\$0.00	\$0.00	\$0.00	\$13,073.15
18	Demand Response 1 (Commercial)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
25	Demand Response 1 (Industrial)	see #18	\$0.00	\$0.00	\$0.00	see #18
34	Home Energy Audit Tool	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	<b>TOTAL Province-wide CDM PROGRAMS</b>	<b>\$713,482.36</b>	<b>\$41,055.00</b>	<b>\$669,409.62</b>	<b>\$0.00</b>	<b>\$1,423,946.98</b>

**Table 4: Cumulative Spending (2011-2014)**

	<b>Initiative</b>	<b>Program Administration Budget (PAB)</b>	<b>Participant Based Funding (PBF)</b>	<b>Participant Incentives (PI)</b>	<b>Capability Building Funding (CBF)</b>	<b>TOTAL</b>
	<b>Consumer Program</b>					
1	Appliance Retirement	\$83,364.04	\$0.00	\$0.00	\$0.00	\$83,364.04
2	Appliance Exchange	\$42,485.94	\$0.00	\$0.00	\$0.00	\$42,485.94
3	HVAC Incentives	\$67,934.69	\$0.00	\$0.00	\$0.00	\$67,934.69
4	Conservation Instant Coupon Booklet	\$64,175.69	\$0.00	\$0.00	\$0.00	\$64,175.69
5	Bi-Annual Retailer Event	\$45,854.94	\$0.00	\$0.00	\$0.00	\$45,854.94
6	Retailer Co-op	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	Residential Demand Response	\$140,009.10	\$0.00	\$0.00	\$0.00	\$140,009.10
10	New Construction Program	\$72,198.69	\$0.00	\$0.00	\$0.00	\$72,198.69
	<b>Business Program</b>					
11	Efficiency: Equipment Replacement	\$346,876.41	\$0.00	\$955,096.37	\$0.00	\$1,301,972.78
12	Direct Installed Lighting	\$134,931.08	\$98,685.00	\$405,156.25	\$0.00	\$638,772.33
14	Existing Building Commissioning Incentive	\$25,498.58	\$0.00	\$0.00	\$0.00	\$25,498.58
15	New Construction and Major Renovation Initiative	\$36,509.58	\$0.00	\$0.00	\$0.00	\$36,509.58
16	Energy Audit	\$60,174.68	\$0.00	\$38,285.50	\$0.00	\$98,460.18

17	Small Commercial Demand Response (part of the Residential program schedule)	see #7	see #7	see #7	see #7	see #7
19	Demand Response 3 (part of the Industrial program schedule)	see #26	see #26	see #26	see #26	see #26
<b>Industrial Program</b>						
20	Process & System Upgrades					
	a) preliminary engineering study	\$12,620.36	\$0.00	\$10,000.00	\$0.00	\$22,620.36
	b) detailed engineering study	\$11,345.36	\$0.00	\$0.00	\$0.00	\$11,345.36
	c) program incentive	\$7,072.85	\$0.00	\$0.00	\$0.00	\$7,072.85
21	Monitoring & Targeting	\$5,797.85	\$0.00	\$0.00	\$0.00	\$5,797.85
22	Energy Manager	\$12,097.85	\$0.00	\$0.00	\$0.00	\$12,097.85
23	Key Account Manager ("KAM")	\$20,200.10	\$0.00	\$0.00	\$0.00	\$20,200.10
24	Efficiency: Equipment Replacement Incentive (part of the C&I program schedule)	see #11	see #11	see #11	see #11	see #11
26	Demand Response 3	\$23,318.85	\$0.00	\$0.00	\$0.00	\$23,318.85
<b>Home Assistance Program</b>						
27	Home Assistance Program	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Pre 2011 Programs</b>						
28	Electricity Retrofit Incentive Program	\$0.00	\$0.00	\$1,288,860.00	\$0.00	\$1,288,860.00
29	High Performance New Construction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

30	Toronto Comprehensive	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
31	Multifamily Energy Efficiency Rebates	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
32	Data Centre Incentive Program	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
33	EnWin Green Suites	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	<b>Initiatives Not in Market</b>					
8	Midstream Electronics	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	Midstream Pool Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	Demand Service Space Cooling	\$25,455.08	\$0.00	\$0.00	\$0.00	\$25,455.08
18	Demand Response 1 (Commercial)	\$3,507.27	\$0.00	\$0.00	\$0.00	\$3,507.27
25	Demand Response 1 (Industrial)	see #18	\$0.00	\$0.00	\$0.00	see #18
34	Home Energy Audit Tool	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	<b>TOTAL Province-wide CDM PROGRAMS</b>	<b>\$1,241,428.99</b>	<b>\$98,685.00</b>	<b>\$2,697,398.12</b>	<b>\$0.00</b>	<b>\$4,037,512.11</b>

## 4.4 Additional Comments

While the 2011 roll-out of the CDM portfolio had its shares of challenges highlighted in the 2011 and 2012 CDM Annual Reports, Guelph Hydro did notice some significant improvements, particularly related to the functionality and stability of the project administrative tools provided by the OPA. Many customers and / or their agents were becoming more familiar with program requirements and use of the application tools. Payment processing had noticeably improved over 2011. The LDC community and EDA CDM Working Groups worked hard to try to implement changes to improve the effectiveness of the programs.

In spite of the noticeable improvements, a variety of challenges were still present in 2012, as noted throughout this document. Primary concerns from an LDC program delivery perspective included the uncertainty around gas fired load displacement projects; lack of transparency in DR3 program participants; lack of transparency in project EM&V processes; as well as the onerous contractual obligations and project application processes experienced both by customers and LDCs for some programs.

The Ministerial Directive regarding a “2015 extension”, when released late in 2012, generated a great deal of uncertainty regarding its implementation, particularly with respect to the lack of a defined funding mechanism, as well as the unknown impact on the achievement of hard 2014 conservation targets. While the LDC community understands and supports the benefits associated with offering CDM programs and customer incentive payments for 2015, greater clarity and certainty around its implementation are needed.

## 5 Combined CDM Reporting Elements

### 5.1 Progress Towards CDM Targets

Guelph Hydro's 2012 Net Peak Demand Savings and Net Cumulative Energy Savings are summarized in Tables 5 and 6, and indicate good progress towards the 2014 targets. The 2012 demand and energy savings results are discussed in more detail in the following sections.

The information used to populate Tables 5 and 6 was provided by the OPA through the OPA Annual CDM Report 2012 - Final Verified Results - Guelph Hydro Electric Systems Inc. document.

**Net Peak Demand Target:** Guelph Hydro's 2012 net peak demand savings are reported as 41.2% of the 2014 target of 16.71 MW.

As per the OPA reporting methodology, these results against 2014 target do not include any potential contribution from customers participating in either the residential or commercial/industrial Demand Response (DR) programs in 2012. This is due to the assumption that the persistence of customers enrolled in DR programs is only 1 year. In order for DR results to be included as a contribution towards the 2014 target, customers must be confirmed as enrolled in the programs in 2014.

When the incremental DR demand savings are factored into the 2014 demand results, (ie assume the DR resources remain in Guelph Hydro's service territory until 2014) the potential achievement against 2014 target is increased to approximately 47%. Guelph Hydro is of the belief that the majority of the DR3 resources under contract will remain under contract and be participants in 2014.

When comparing Guelph Hydro's results against the 2012 province wide Net Peak Demand Savings as reported in the OPA FINAL 2012 Results, Guelph Hydro's demand savings of over 40% are tracking approximately 20% ahead of the provincial results at 17.8% of the provincial target.

**Table 5: Net Peak Demand Savings at the End User Level (MW)**

Implementation Period	Annual (MW)			
	2011	2012	2013	2014
2011 – Verified by OPA	3.4	3.0	3.0	2.9
2012 – Verified by OPA		5.1	4.0	4.0
2013				
2014				
<b>Verified Net Annual Peak Demand Savings in 2014:</b>				<b>6.90</b>
<b>Guelph Hydro 2014 Annual CDM Capacity Target:</b>				<b>16.71</b>
<b>Verified Portion of Peak Demand Savings Target Achieved (%):</b>				<b>41.2%</b>

**Net Energy Target:** Guelph Hydro’s 2012 net energy savings are reported as 106.8% of the 2014 target of 79.53 GWh.

As noted in Guelph Hydro’s 2011 CDM Annual Report, a significant component (over 50%) of the 2014 cumulative energy savings is a result of the contribution of Pre-2011 Programs completed in 2011, with a large percentage of this achievement resulting from Electricity Retrofit Incentive Program (ERIP) projects. A significant number of ERIP projects were started in 2010, but were not completed by customers until 2011.

The positive net energy savings results achieved to date will permit Guelph Hydro to continue to work with customers to encourage participation in future energy efficiency projects, but will also allow Guelph Hydro to focus more closely on programs designed to manage demand, in an effort to improve Guelph Hydro’s net demand savings results.

When comparing Guelph Hydro’s results against the 2012 province wide Net Energy Savings as reported in the OPA FINAL 2012 Results, Guelph Hydro’s energy savings of over 105% are tracking approximately 45% ahead of the provincial results at 65.1% of the provincial target.

**Table 6: Net Energy Savings at the End-User Level (GWh)**

Implementation Period	Annual (GWh)				Cumulative (GWh)
	2011	2012	2013	2014	2011-2014
2011 – Verified by OPA	14.4	14.4	14.4	14.2	57.4
2012 – Verified by OPA		8.9	8.9	8.8	27.5
2013					
2014					
<b>Verified Net Cumulative Energy Savings 2011-2014:</b>					<b>85.0</b>
<b>Guelph Hydro 2011-2014 Cumulative CDM Energy Target:</b>					<b>79.53</b>
<b>Verified Portion of Cumulative Energy Target Achieved (%):</b>					<b>106.8%</b>

## 5.2 Variance from Strategy

Through 2011-2012 Guelph Hydro has made significant progress towards its 2014 targets, in spite of the various challenges faced by it and the LDC community in their efforts to achieve their CDM goals.

The OPA has developed a pipeline analysis tool which is useful in assessing the potential energy and demand savings, primarily from ERIP (Retrofit) projects “in the pipeline”. In relation to the 2014 target, Guelph Hydro has already exceeded its net energy savings against target by year end 2012, so the pipeline analysis focused primarily on potential net demand savings. Based on the pipeline analysis overlaid with

an assessment of potential projects not currently in the queue, Guelph Hydro anticipates an approximate 4.1 MW or 25% shortfall to its 2014 demand savings target of 16.71 MW. This analysis was completed under the assumption that the potential PSUI load displacement generation project would not be included in the 2014 forecast, based on the uncertainty of the program rules, and time remaining to implement and put in-service the project. Guelph Hydro expects that more clarity around this projects' potential to support Guelph Hydro's 2014 demand target will be known in 2013.

As previously noted, in 2013 Guelph Hydro intends to review market conditions for continuation of the Tier 2 / Tier 3 program application process started in 2011.

### **5.3 Outlook to 2014 and Strategy Modifications**

Based on the results achieved to date, Guelph Hydro at this time does not see a need for significant deviation from its current path. Guelph Hydro plans to continue to focus on building and maintaining solid customer relations with all rate classes, with a view to supporting the customer's needs in pursuing energy conservation and demand management information and goals.

As previously noted, Guelph Hydro's positive net energy savings results achieved through 2011-2012 will permit Guelph Hydro to continue to work with customers to encourage participation in future energy efficiency projects, but will also allow Guelph Hydro to focus more closely on programs designed to manage demand to improve net demand savings results.

In its 2011 CDM Annual Report, Guelph Hydro indicated that several of the OPA programs were not in market in 2011. Through 2012, Guelph Hydro has established or increased its activity in some previously underserved program areas such as Retailer Events, Coupon programs, PSUI and channel partner training. However, Guelph Hydro recognizes that a few OPA programs were effectively not in market in 2012, for a variety of reasons described throughout this document. In 2013 Guelph Hydro intends to focus on these initiatives (*peaksaver*PLUS™ program, Low Income Initiative, High Performance New Construction Initiative) in support of improved results. With its Smart Meter Zigbee chip deployment, Guelph Hydro believes there is a great opportunity to develop and implement a unique and customer focused In-Home Display offering, which should be an excellent vehicle for promoting the Residential Demand Response (RDR) program and engaging the consumer in a meaningful manner.

Guelph Hydro plans to continue proactive and reactive sales calls as well as business and industrial education outreach and events. As many of the CDM programs have now been in market for several years, the focus needs to shift from the "low hanging fruit" CDM savings potential (ie. lighting projects), to other savings potential, such as process and systems improvements, and non-traditional prescriptive measures such as VFDs.

Guelph Hydro will continue to use PAB funding strategically to support its customers in pursuit of energy and demand savings opportunities. A 2012 example of this was to co-fund process studies (ie. compressed air) not eligible for funding through 2012 saveONenergy programs. This work has typically resulted in an ERII project application.



Moving forward, Guelph Hydro intends to continue to work collaboratively with other LDCs in the administration and delivery of the saveONenergy programs. Guelph Hydro found this to be an extremely useful vehicle to improve understanding of the saveONenergy programs requirements, highlight “best practices”, as well as showcase potential technologies and service provider capabilities, and potentially jointly deliver initiatives with other LDCs where synergies exist.

In summary, GHESI plans to continue to pursue and implement those strategies that have demonstrated success to date, and revisit the planning assumptions on a regular basis as the 2011-2014 CDM delivery timeframe unfolds.

## 6.0 Conclusion

In 2012, Guelph Hydro achieved 5.1 MW of incremental peak demand savings and 8.9 GWh of incremental energy savings. These results represent 41.2% and 106.8% of Guelph Hydro's 2014 net peak demand and net energy savings targets, respectively. Achievement of these results are reflect a considerable effort expended by Guelph Hydro, in cooperation with other LDCs, customers, channel partners and stakeholders to overcome many operational and structural issues that limited program effectiveness across all market sectors. This achievement should be viewed as a success, and the relationships built within the 2011-2014 CDM program term will aid results in a subsequent CDM term.

However, despite continuing improvements to existing programs, Guelph Hydro faces challenges in the remaining years of the current CDM framework. With the current slate of available OPA Programs, and the current forecast of implementation and projected savings, Guelph Hydro knows it will exceed its 2014 79.53 GWh consumption target but will have difficulty meeting its 2014 demand savings target of 16.71 MW. Based on a pipeline analysis (projects currently in the queue) and an assessment of potential projects not currently in the queue, Guelph Hydro anticipates an approximate 4.1 MW or 25% shortfall to its 2014 demand savings target of 16.71 MW.

Looking ahead there is limited opportunity to make valuable changes to the current program portfolios and have these changes reflected in LDC 2014 results. However, LDCs and the OPA can build on the strengths and key successes of the 2011-2014 programs to modify existing and launch new programs which will meet the needs of the industry and consumers.

## Appendix A: Initiative Descriptions

### Residential Program

#### APPLIANCE RETIREMENT INITIATIVE (Exhibit D)

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Year round

**Objectives:** Achieve energy and demand savings by permanently decommissioning certain older, inefficient refrigeration appliances.

**Description:** This is an energy efficiency Initiative that offers individuals and businesses free pick-up and decommissioning of old large refrigerators and freezers. Window air conditioners and portable dehumidifiers will also be picked up if a refrigerator or a freezer is being collected.

**Targeted End Uses:** Large refrigerators, large freezers, window air conditioners and portable dehumidifiers.

**Delivery:** OPA centrally contracts for the province-wide marketing, call centre, appliance pick-up and decommissioning process. LDC's provides local marketing and coordination with municipal pick-up where available.

Additional detail is available:

- Schedule B-1, Exhibit D:  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer/Programs/Appliance-Retirement.aspx>

**In Market Date:** refer to Tables of Section 3.1

#### APPLIANCE EXCHANGE INITIATIVE (Exhibit E)

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Spring and Fall

**Objective:** The objective of this Initiative is to remove and permanently decommission older, inefficient window air conditioners and portable dehumidifiers that are in Ontario.

**Description:** This Initiative involves appliance exchange events. Exchange events are held at local retail locations and customers are encouraged to bring in their old room air conditioners (AC) and dehumidifiers in exchange for coupons/discounts towards the purchase of new energy efficient equipment.

**Targeted End Uses:** Window air conditioners and portable dehumidifiers

**Delivery:** OPA contracts with participating retailers for collection of eligible units. LDCs provide local marketing.

Additional detail is available:

- Schedule B-1, Exhibit C  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer.aspx>

**In Market Date:** refer to Tables of Section 3.1

HVAC INCENTIVES INITIATIVE (Exhibit B)

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to encourage the replacement of existing heating systems with high efficiency furnaces equipped with Electronically Commutated Motors (ECM), and to replace existing central air conditioners with ENERGY STAR qualified systems and products.

**Description:** This is an energy efficiency Initiative that provides rebates for the replacement of old heating or cooling systems with high efficiency furnaces (equipped with ECM) and Energy Star qualified central air conditioners by approved Heating, Refrigeration, and Air Conditioning Institute (HRAI) qualified contractors.

**Targeted End Uses:** Central air conditioners and furnaces

**Delivery:** OPA contracts centrally for delivery of the program. LDCs provide local marketing and encourage local contractors to participate in the Initiative.

Additional detail is available:

- Schedule B-1, Exhibit B  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer.aspx>

**In Market Date:** refer to Tables of Section 3.1

## CONSERVATION INSTANT COUPON INITIATIVE (Exhibit A)

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to encourage households to purchase energy efficient products by offering discounts.

**Description:** This Initiative provides customers with year round coupons. The coupons offer instant rebates towards the purchase of a variety of low cost, easy to install energy efficient measures and can be redeemed at participating retailers. Booklets were directly mailed to customers and were also available at point-of-purchase. Downloadable coupons were also available at [www.saveoneenergy.ca](http://www.saveoneenergy.ca).

**Targeted End Uses:** ENERGY STAR® qualified Standard Compact Fluorescent Lights (“CFLs”), ENERGY STAR® qualified Light Fixtures lighting control products, weather-stripping, hot water pipe wrap, electric water heater blanket, heavy duty plug-in Timers, Advanced power bars, clothesline, baseboard programmable thermostats.

**Delivery:** The OPA develops the electronic version of the coupons and posts them online for download. Three LDC specific coupons were made available for local marketing and utilization by LDCs. The OPA enters into agreements with retailers to honour the coupons.

Additional detail is available:

- Schedule B-1, Exhibit A  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer.aspx>

**In Market Date:** Refer to Tables of Section 3.1

## BI-ANNUAL RETAILER EVENT INITIATIVE (Exhibit C)

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Bi-annual events

**Objective:** The objective of this Initiative is to provide instant point of purchase discounts to individuals at participating retailers for a variety of energy efficient products.

**Description:** Twice a year (Spring and Fall), participating retailers host month-long rebate events. During the months of April and October, customers are encouraged to visit participating retailers where they can find coupons redeemable for instant rebates towards a variety of low cost, easy to install energy efficient measures.

**Targeted End Uses:** As per the Conservation Instant Coupon Initiative

**Delivery:** The OPA enters into arrangements with participating retailers to promote the discounted products, and to post and honour related coupons. LDCs also refer retailers to the OPA and market this initiative locally.

Additional detail is available:

- Schedule B-1, Exhibit C  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20B-1%20Residential%20Program.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer.aspx>

**In Market Date:** March 2011

**In Market Date:** Refer to Tables of Section 3.1

#### RETAILER CO-OP

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Year Round

**Objective:** Hold promotional events to encourage customers to purchase energy efficiency measures (and go above-and-beyond the traditional Bi-Annual Coupon Events).

**Description:** The Retailer Co-op Initiative provides LDCs with the opportunity to work with retailers in their service area by holding special events at retail locations. These events are typically special promotions that encourage customers to purchase energy efficiency measures (and go above-and-beyond the traditional Bi-Annual Coupon Events).

**Targeted End Uses:** As per the Conservation Instant Coupon Initiative

**Delivery:** Retailers apply to the OPA for co-op funding to run special promotions that promote energy efficiency to customers in their stores. LDCs can refer retailers to the OPA. The OPA provides each LDC with a list of retailers who have qualified for Co-Op Funding as well as details of the proposed special events.

**In Market Date:** Refer to Tables of Section 3.1

#### NEW CONSTRUCTION PROGRAM (Schedule B-2)

**Target Customer Type(s):** Residential Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to provide incentives to participants for the purpose of promoting the construction of energy efficient residential homes in the Province of Ontario.

**Description:** This is an energy efficiency Initiative that provides incentives to homebuilders for constructing new homes that are efficient, smart, and integrated (applicable to new single family dwellings). Incentives are provided in two key categories as follows:

- Incentives for homebuilders who install electricity efficiency measures as determined by a prescriptive list or via a custom option.
- Incentives for homebuilders who meet or exceed aggressive efficiency standards using the EnerGuide performance rating system.

**Targeted End Uses:** All off switch, ECM motors, ENERGY STAR qualified central a/c, lighting control products, lighting fixtures, Energuide 83 whole home, energuide 85 whole homes

**Delivery:** Local engagement of builders will be the responsibility of the LDC and will be supported by OPA air coverage driving builders to their LDC for additional information.

Additional detail is available:

- Schedule B-1, Exhibit C  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20B-2%20New%20Construction%20Program.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20B-2%20New%20Construction%20Program.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer.aspx>

**In Market Date:** Refer to Tables of Section 3.1

#### RESIDENTIAL DEMAND RESPONSE PROGRAM (Schedule B-3)

**Target Customer Type(s):** Residential and Small Commercial Customers

**Initiative Frequency:** Year round

**Objective:** The objectives of this Initiative are to enhance the reliability of the IESO-controlled grid by accessing and aggregating specified residential and small commercial end uses for the purpose of load reduction, increasing consumer awareness of the importance of reducing summer demand and providing consumers their current electricity consumption and associated costs.

**Description:** In *peaksaver*PLUS™ participants are eligible to receive a free programmable thermostat or switch, including installation. Participants also receive access to price and real-time consumption information on an In Home Display (IHD).

**Targeted End Uses:** central air conditioning, electric hot water heaters and pool pumps

**Delivery:** LDC's recruit customers and procure technology

Additional detail is available:

- Schedule B-1, Exhibit C  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/SCHED\\_2011\\_ResDR\\_B\\_3\\_110727%28MJB%29v15\\_redacted.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/SCHED_2011_ResDR_B_3_110727%28MJB%29v15_redacted.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Consumer.aspx>

**In Market Date:** Refer to Tables of Section 3.1

## C&I Program

### **EFFICIENCY: EQUIPMENT REPLACEMENT INCENTIVE (ERII) (Schedule C-2)**

**Target Customer Type(s):** Commercial, Institutional, Agricultural and Industrial Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to offer incentives to non-residential distribution customers to achieve reductions in electricity demand and consumption by upgrading to more energy efficient equipment for lighting, space cooling, ventilation and other measures.

**Description:** The Equipment Replacement Incentive Initiative (ERII) offers financial incentives to customers for the upgrade of existing equipment to energy efficient equipment. Upgrade projects can be classified into either: 1) prescriptive projects where prescribed measures replace associated required base case equipment; 2) engineered projects where energy and demand savings and incentives are calculated for associated measures; or 3) custom projects for other energy efficiency upgrades.

**Targeted End Uses:** lighting, space cooling, ventilation and other measures

**Delivery:** LDC delivered.

Additional detail is available:

- Schedule C-2  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20C-2%20ERII%20Initiative.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20C-2%20ERII%20Initiative.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Business/Program-Overviews/Retrofit-for-Commercial.aspx>

**In Market Date:** Refer to Tables of Section 3.1



#### DIRECT INSTALL INITIATIVE (DIL) (Schedule C-3)

**Target Customer Type(s):** Small Commercial, Institutional, Agricultural facilities and multi-family buildings

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to offer a free installation of eligible lighting and water heating measures of up to \$1,000 to eligible owners and tenants of small commercial, institutional and agricultural facilities and multi-family buildings, for the purpose of achieving electricity and peak demand savings.

**Description:** The Direct Installed Lighting Initiative targets customers in the General Service <50kW account category. This Initiative offers turnkey lighting and electric hot water heater measures with a value up to \$1,000 at no cost to qualifying small businesses. In addition, standard prescriptive incentives are available for eligible equipment beyond the initial \$1,000 limit.

**Target End Uses:** Lighting and electric water heating measures

**Delivery:** Participants can enroll directly with the LDC, or would be contacted by the LDC/LDC-designated representative.

Additional detail is available:

- Schedule C-3  
<http://www.powerauthority.on.ca/sites/default/files/page/Schedule%20C-3%20Direct%20Install%20Initiative%20-%20redacted.pdf> and
- SaveONenergy website <https://saveonenergy.ca/Business.aspx>

**In Market Date:** Refer to Tables of Section 3.1

#### EXISTING BUILDING COMMISSIONING INCENTIVE INITIATIVE (Schedule C-6)

**Target Customer Type(s):** Commercial, Institutional, and Agricultural Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to offer incentives for optimizing (but not replacing) existing chilled water systems for space cooling in non-residential facilities for the purpose of achieving implementation phase energy savings, implementation phase demand savings, or both.

**Description:** This Initiative offers Participants incentives for the following:

- scoping study phase
- investigation phase
- implementation phase

- hand off/completion phase

**Targeted End Uses:** Chilled water systems for space cooling

**Delivery:** LDC delivered.

Additional detail is available:

- Schedule C-6  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20C-6%20Commissioning%20Initiative.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20C-6%20Commissioning%20Initiative.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Business/Program-Overviews/Existing-Building-Commissioning.aspx>

**In Market Date:** Refer to Tables of Section 3.1

#### NEW CONSTRUCTION AND MAJOR RENOVATION INITIATIVE (HPNC) (Schedule C-4)

**Target Customer Type(s):** Commercial, Institutional, Agricultural and Industrial Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to encourage builders/major renovators of commercial, institutional, and industrial buildings (including multi-family buildings and agricultural facilities) to reduce electricity demand and/or consumption by designing and building new buildings with more energy-efficient equipment and systems for lighting, space cooling, ventilation and other Measures.

**Description:** The New Construction initiative provides incentives for new buildings to exceed existing codes and standards for energy efficiency. The initiative uses both a prescriptive and custom approach.

**Targeted End Uses:** New building construction, building modeling, lighting, space cooling, ventilation and other Measures

**Delivery:** LDC delivers to customers and design decision makers.

Additional detail is available:

- Schedule C-4  
<http://www.powerauthority.on.ca/sites/default/files/page/ScheduleC-4NewConstructionInitiativeV2.pdf> and
- SaveONenergy website <https://saveonenergy.ca/Business/Program-Overviews/New-Construction.aspx>

**In Market Date:** Refer to Tables of Section 3.1

## ENERGY AUDIT INITIATIVE (Schedule C-1)

**Target Customer Type(s):** Commercial, Institutional, Agricultural and Industrial Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this Initiative is to offer incentives to owners and lessees of commercial, institutional, multi-family buildings and agricultural facilities for the purpose of undertaking assessments to identify all possible opportunities to reduce electricity demand and consumption within their buildings or premises.

**Description:** This Initiative provides participants incentives for the completion of energy audits of electricity consuming equipment located in the facility. Energy audits include development of energy baselines, use assessments and performance monitoring and reporting.

**Targeted End Uses:** Various

**Delivery:** LDC delivered.

Additional detail is available:

- Schedule C-1  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20C-1%20Energy%20Audit%20Initiative.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20C-1%20Energy%20Audit%20Initiative.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Business/Program-Overviews/Audit-Funding.aspx>

**In Market Date:** Refer to Tables of Section 3.1

## Industrial Program

### PROCESS & SYSTEMS UPGRADES INITIATIVE (PSUI) (Schedule D-1)

**Target Customer Type(s):** Industrial, Commercial, Institutional and Agricultural Customers

**Initiative Frequency:** Year round

**Objectives:** The objectives of this Initiative are to:

- Offer distribution customers capital incentives and enabling initiatives to assist with the implementation of large projects and project portfolios;
- Implement system optimization project in systems which are intrinsically complex and capital intensive; and
- Increase the capability of distribution customers to implement energy management and system optimization projects.

**Description:** PSUI is an energy management Initiative that includes three Initiatives: (preliminary engineering study, detailed engineering study, and project incentive Initiative). The incentives are available to large distribution connected customers with projects or portfolio projects that are expected to generate at least 350 MWh of annualized electricity savings or, in the case of Micro-Projects, 100 MWh of annualized electricity savings. The capital incentive for this Initiative is the lowest of:

- a) \$200/MWh of annualized electricity savings
- b) 70% of projects costs
- c) A one year pay back

**Targeted End Uses:** Process and systems

**Delivery:** LDC delivered with Key Account Management support, in some cases.

Additional detail is available:

- Schedule D-1  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20D-1%20Process%20and%20Systems%20Upgrades%20Initiative.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20D-1%20Process%20and%20Systems%20Upgrades%20Initiative.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Business.aspx>

**In Market Date:** Refer to Tables of Section 3.1

#### MONITORING & TARGETING INITIATIVE (Schedule D-2)

**Target Customer Type(s):** Industrial, Commercial, Institutional and Agricultural Customers

**Initiative Frequency:** Year round

**Objective:** This Initiative offers access to funding for the installation of Monitoring and Targeting systems in order to deliver a minimum savings target at the end of 24 months and sustained for the term of the M&T Agreement.

**Description:** This Initiative offers customers funding for the installation of a Monitoring and Targeting system to help them understand how their energy consumption might be reduced. A facility energy manager, who regularly oversees energy usage, will now be able to use historical energy consumption performance to analyze and set targets.

**Targeted End Uses:** Process and systems

**Delivery:** LDC delivered with Key Account Management support, in some cases.

Additional detail is available:

- Schedule D-2  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20D-2%20Monitoring%20and%20Targeting%20Initiative.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20D-2%20Monitoring%20and%20Targeting%20Initiative.pdf)  
and
- SaveONenergy website <https://saveonenergy.ca/Business.aspx>

**In Market Date:** Refer to Tables of Section 3.1

#### ENERGY MANAGER INITIATIVE (Schedule D-3)

**Target Customer Type(s):** Industrial, Commercial, Institutional and Agricultural Customers

**Initiative Frequency:** Year round

**Objective:** The objective of this initiative is to provide customers and LDCs the opportunity to access funding for the engagement of energy managers in order to deliver a minimum annual savings target.

**Description:** This Initiative provides customers the opportunity to access funding to engage an on-site, full time embedded energy manager, or an off-site roving energy manager who is engaged by the LDC. The role of the energy manager is to take control of the facility's energy use by monitoring performance, leading awareness programs, and identifying opportunities for energy consumption improvement, and spearheading projects. Participants are funded 80% of the embedded energy manager's salary up to \$100,000 plus 80% of the energy manager's actual reasonable expenses incurred up to \$8,000 per year. Each embedded energy manager has a target of 300 kW/year of energy savings from one or more facilities. LDCs receive funding of up to \$120,000 for a Roving Energy Manager plus \$8,000 for expenses.

**Targeted End Uses:** Process and systems

**Delivery:** LDC delivered with Key Account Management support, in some cases.

Additional detail is available:

- Schedule D-3  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20D-3%20Energy%20Manager%20Initiative%202011-2014.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20D-3%20Energy%20Manager%20Initiative%202011-2014.pdf) and
- SaveONenergy website <https://saveonenergy.ca/Business.aspx>

**In Market Date:** Refer to Tables of Section 3.1

#### KEY ACCOUNT MANAGER (KAM) (Schedule D-4)

**Target Customer Type(s):** Industrial, Commercial, Institutional and Agricultural Customers

**Initiative Frequency:** Year round

**Objective:** This initiative offers LDCs the opportunity to access funding for the employment of a KAM in order to support them in fulfilling their obligations related to the PSUI.

**Description:** This Initiative provides LDCs the opportunity to utilize a KAM to assist their customers. The KAM is considered to be a key element in assisting the consumer in overcoming traditional barriers related to energy management and help them achieve savings since the KAM can build relationships and become a significant resource of knowledge to the customer.

**Targeted End Uses:** Process and systems

**Delivery:** LDC delivered

Additional detail is available:

- ScheduleD-4  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/projects\\_programs/pdfs/PSUI%20Initiative%20Schedule%20D-4.Key%20Account%20Manager.20110322.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/projects_programs/pdfs/PSUI%20Initiative%20Schedule%20D-4.Key%20Account%20Manager.20110322.pdf)

**In Market Date:** Refer to Tables of Section 3.1

#### DEMAND RESPONSE 3 (Schedule D-6)

**Target Customer Type(s):** Industrial, Commercial, Institutional and Agricultural Customers

**Initiative Frequency:** Year round

**Objective:** This Initiative provides for Demand Response (“DR”) payments to contracted participants to compensate them for reducing their electricity consumption by a pre-defined amount during a DR event.

**Description:** Demand Response 3 (“DR3”) is a demand response Initiative for commercial and industrial customers, of 50 kW or greater to reduce the amount of power being used during certain periods of the year. The DR3 Initiative is a contractual resource that is an economic alternative to procurement of new generation capacity. DR3 comes with specific contractual obligations requiring participants to reduce their use of electricity relative to a baseline when called upon. This Initiative makes payments for participants to be on standby and payments for the actual electricity reduction provided during a demand response event. Participants are scheduled to be on standby approximately 1,600 hours per calendar year for possible dispatch of up to 100 hours or 200 hours within that year depending on the contract.

**Targeted End Uses:** Commercial and Industrial Operations

**Delivery:** DR3 is delivered by Demand Response Providers (“DRPs”), under contract to the OPA. The OPA administers contracts with all DRPs and Direct Participants (who provide in excess of 5 MW of demand response capacity). OPA provides administration including settlement, measurement and verification, and dispatch. LDCs are responsible for local customer outreach and marketing efforts.

Additional detail is available:

- Schedule D-6  
[http://www.powerauthority.on.ca/sites/default/files/new\\_files/industry\\_stakeholders/current\\_electricity\\_contracts/pdfs/Schedule%20D-6%20Demand%20Response%203%202011-2014.pdf](http://www.powerauthority.on.ca/sites/default/files/new_files/industry_stakeholders/current_electricity_contracts/pdfs/Schedule%20D-6%20Demand%20Response%203%202011-2014.pdf)  
and
- SaveONenergy website <https://saveonenergy.ca/Business.aspx>

**In Market Date:** January 2011

It is noted that while the Schedule for this Initiative was not posted until May 2011, the Aggregators reported that they were able to enroll customers as of January 2011.

## Low Income Program

LOW INCOME INITIATIVE (HOME ASSISTANCE PROGRAM) (Schedule E-1)

**Target Customer Type(s):** Income Qualified Residential Customers

**Initiative Frequency:** Year Round

**Objective:** The objective of this Initiative is to offer free installation of energy efficiency measures to income qualified households for the purpose of achieving electricity and peak demand savings.

**Description:** This is a turnkey Initiative for income qualified customers. It offers residents the opportunity to take advantage of free installation of energy efficient measures that improve the comfort of their home, increase efficiency, and help them save money. All eligible customers receive a Basic and Extended Measures Audit, while customers with electric heat also receive a Weatherization Audit. The Initiative is designed to coordinate efforts with gas utilities.

**Targeted End Uses:** End use measures based on results of audit (i.e. compact fluorescent light bulbs)

**Delivery:** LDC delivered.

Additional detail is available:

- Schedule E  
<http://www.powerauthority.on.ca/sites/default/files/page/Low%20Income%20Schedule%20-%20redacted%20version.pdf>

**In Market Date:** Refer to Tables of Section 3.1

## Appendix B: Pre-2011 Programs

### ELECTRICITY RETROFIT INCENTIVE PROGRAM

**Target Customer Type(s):** Commercial, Institutional, and Agricultural Customers

**Initiative Frequency:** Year Round

**Objective:** The objective of this Initiative is to offer incentives to non-residential distribution customers to achieve reductions in electricity demand and consumption by upgrading to more energy efficient equipment for lighting, space cooling, ventilation and other measures.

**Description:** The Equipment Replacement Incentive Program (ERIP) offered financial incentives to customers for the upgrade of existing equipment to energy efficient equipment. This program was available in 2010 and allowed customers up to 11 months following Pre-Approval to complete their projects. As a result, a number of projects Pre-Approved in 2010 were not completed and in-service until 2011. The electricity savings associated with these projects are attributed to 2011.

**Targeted End Uses:** Electricity savings measures

**Delivery:** LDC Delivered

### HIGH PERFORMANCE NEW CONSTRUCTION

**Target Customer Type(s):** Commercial, Institutional, and Agricultural Customers

**Initiative Frequency:** Year round

**Objective:** The High Performance New Construction Initiative provided incentives for new buildings to exceed existing codes and standards for energy efficiency. The Initiative uses both a prescriptive and custom approach and was delivered by Enbridge Gas under contract with the OPA (and subcontracted to Union Gas), which ran until December 2010.

**Description:** The objective of this Initiative is to encourage builders of commercial, institutional, and industrial buildings (including multi-family buildings and agricultural facilities) to reduce electricity demand and/or consumption by designing and building new buildings with more energy-efficient equipment and systems for lighting, space cooling, ventilation and other Measures.

**Targeted End Uses:** New Building construction, building modeling, lighting, space cooling, ventilation and other measures

**Delivery:** Through Enbridge Gas (and subcontracted to Union Gas)



## TORONTO COMPREHENSIVE INITIATIVE

**Target Customer Type(s):** Commercial and Institutional Customers

**Initiative Frequency:** Year round

**Objective:** not applicable

**Description:** This Initiative is specific to Toronto Hydro's Service Area.

**Targeted End Uses:** not applicable

**Delivery:** not applicable

## MULTIFAMILY ENERGY EFFICIENCY REBATES

**Target Customer Type(s):** Residential Multi-unit buildings

**Initiative Frequency:** Year round

**Objective:** Improve energy efficiency of Multi-unit building

**Description:** OPA's Multifamily Energy Efficiency Rebates (MEER) Initiative applies to multifamily buildings of six units or more, including rental buildings, condominiums, and assisted social housing. The OPA contracted with GreenSaver to deliver the MEER Initiative outside of the Toronto Hydro service territory. Activities delivered in Toronto were contracted with the City.

Similar to ERII and ERIP, MEER provides financial incentives for prescriptive and custom measures, but also funds resident education. Unlike ERII, where incentives are paid by the LDC, all incentives through MEER are paid through the contracted partner (i.e. GreenSaver).

**Targeted End Uses:** Electricity saving measures

**Delivery:** OPA contracted with Greensaver

## DATA CENTRE INCENTIVE PROGRAM

**Target Customer Type(s):** not applicable

**Initiative Frequency:** Year round

**Objective:** not applicable

**Description:** This Initiative is specific to Powerstream's Service Area.

**Targeted End Uses:** not applicable

**Delivery:** not applicable

#### ENWIN GREEN SUITES

**Target Customer Type(s):** not applicable

**Initiative Frequency:** Year round

**Objective:** not applicable

**Description:** This Initiative is specific to EnWin's Service Area.

**Targeted End Uses:** not applicable

**Delivery:** not applicable