

PY2021 EM&V Key Findings and Recommendations IF Small Business Lighting (SBL) Program

No.	KEY FINDINGS	2021 EM&V RECOMMENDATIONS	IMPACT	IESO RESPONSE
1.	<p>More than half of SBL program projects did not have a facility type identified. The PY2021 SBL database did not contain the facility type for the majority (57%) of reported projects (556 of 971 projects). This information is important in understanding which business types are participating in the program, the types of measures installed in those facilities and how successful the measures implemented in the facilities perform. The analysis of facility types in the PY2021 evaluation was based on the 415 projects with available facility data.</p>	<p>Ensure the facility type information is collected and reported for all SBL participants.</p>	High	<p>The IESO is aware of this issue and working to ensure that facility type information is collected in future program years.</p>
2.	<p>Reported Peak Demand Savings – Coincidence Factors (CF). The SBL reported peak demand savings seem to be calculated based on a predetermined coincidence factor (CFs). This is an improvement from previous years where connected demand was reported instead of actual peak demand. However, the CFs used seem to be conservative.</p>	<p>The PY2021 SBL is the last year for the program. For future iterations of this program (i.e. 2021-2024 CDM SBP), it is recommended to further review and update the CFs used to report the peak demand savings to better align with verified results. Another approach that would result in high accuracy of reported peak demand is using the facility's actual HOU collected using the assessment tool to determine project specific CF.</p>	High	<p>The IESO is considering strategies to more accurately report peak demand savings in future program years. These strategies will be implemented as part of the Small Business Program (SBP).</p>
3.	<p>Improved baseline and retrofit photos. photos of the pre-existing baseline and retrofitted fixtures and lamps submitted by the SBL assessors and installers are still taken from wide angles and from a few feet away, which do not provide useful information about the lamp wattage or lamp type.</p>	<p>Given that this is the last year for the IF SBL program, it is recommended to consider this finding for the newly designed Small Business Program (SBP), and specify what information should be captured in the pre-retrofit and post-retrofit pictures that are taken by the SBP assessors/installers</p>	High	<p>The IESO will work with the delivery vendors in SBP to ensure that all required information are captured in photos.</p>

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4.	<p>The SBL assessment tool only accepts one schedule for the entire facility. Six (6) instances were found in the PY2021 sample (n=35), where lighting equipment was installed in multiple spaces with varying schedules. With only one input schedule, assessors tend to input the schedule corresponding to the greatest number of hours a light would operate if varying schedules were observed.</p>	<p>Allow for more than one lighting schedule to be entered on applications. This will allow for more accurate reported lighting savings values.</p>	Medium	<p>The IESO will work with the delivery vendors in SBP to improve the information collected in the assessment tools.</p>
5.	<p>Few participants who were recommended additional lighting upgrades beyond the project cost cap made those upgrades. Only one-sixth (15%) of participants reported that assessors or installers recommended additional lighting upgrades that exceeded the \$2,000 incentive cap. Of those participants, about one-half (4 of 9 respondents) installed them. Most of those participants who installed additional lighting upgrades stated they did so because the incentive cap was not sufficient to complete the project.</p>	<p>When applicable, continue to encourage assessors and installers to offer additional lighting upgrades to participants beyond those available through the program. Help interested participants identify ways to complete the work, either by installing the additional equipment at the time of participation or by providing them with a recommended equipment list to consider installing in the future.</p>	Medium	<p>The IESO is working with the delivery vendors in SBP to ensure that participants are made aware of all available opportunities including those beyond the project cost cap.</p>
6.	<p>Expanding the scope of lighting offerings was a common improvement suggestion. Assessors and installers were least satisfied with the number and types of equipment incentivized (rating of 3.9 on a scale of 1 to 5 where 5 meant "extremely satisfied"). Assessors, installers, and participants most often recommended including exterior lighting and signage offerings. Both IESO staff and delivery vendor staff noted that, while the program offers a wide variety of measures to customers, it must also adhere to cost-effectiveness targets and energy-saving priorities.</p>	<ul style="list-style-type: none"> • Explore the feasibility of including more lighting products that align with program goals and cost-effectiveness targets. • Explore the feasibility of offering a customer co-pay option to expand the scope of customer projects. 	Medium	<p>The IESO will continue to explore additional lighting products that can be included in SBP while remaining cost-effective. A customer co-pay option for additional measures before the incentive cap may be considered in future program years.</p>

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7.	<p>Opportunities exist to improve assessor and installer training and education. Most surveyed assessors and installers reported receiving training and education. Nearly all had received information on the program rules, and many others received information on program offerings. However, program training and education received the lowest satisfaction rating (a 3.9 on a scale of 1 to 5 where 5 meant “extremely satisfied”) from assessors and installers. Providing marketing and outreach techniques to better promote the program to customers was the most common improvement recommendation, followed by more information on the program offerings and rules, and training on installation procedures and practices.</p>	<ul style="list-style-type: none"> ▪ Revisit the assessor and installer training topics to ensure they cover areas that are most of interest to them (e.g., marketing and outreach techniques, more information on offerings and rules, and installation procedures and practices). ▪ Offer training and education with regularity to ensure that assessors and installers to ensure new staff are well-informed about the program and to provide refreshers to others. 	Medium	<p>The IESO is working with the delivery partners of SBP to ensure that training materials and processes are up-to-date and effective.</p>
8.	<p>Participant perspectives on the program and its processes were positive overall, but there were some suggestions for program improvement provided. The majority of participants had no suggestions for improving the initial site assessment (75%), the installer visit(s) (77%), or the overall installation process (85%), which suggests a high level of satisfaction with the program. Of those with suggestions for improvements, the most common were to reduce the time it takes to complete the assessor and installation visits, improve the assessor or installer’s professionalism (such as improving politeness and business etiquette and respecting the company’s time), provide greater flexibility when scheduling the visits, and improve site cleanup.</p>	<ul style="list-style-type: none"> • Reduce the time it takes to complete the assessment and installation visits. Identify areas where additional program support or resources could allow the assessors/installers to complete this task more promptly. • Provide additional training to assessors and installers to ensure professionalism during assessments and installation visits. • Improve communication around scheduling the visits (for example, coordinating with participants to identify suitable times for the visit and sending reminder e-mails and/or text messages confirming appointments and providing accurate arrival windows). • Encourage assessors and installers to ensure all necessary clean up occurs prior to leaving a site. 	Medium	<p>The IESO will continue working with program delivery vendors in SBP to improve the participant experience.</p>

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9.	<p>Additional cross-program promotion opportunities exist. Less than one in ten (7%) of SBL participants had also participated in the Retrofit program in 2021, and one in fifty (2%) participated in the Refrigeration Efficiency Program (REP).</p>	<p>Continue to identify cross-program promotion opportunities, which can be achieved through two means. Firstly, promoting other program opportunities to all participating SBL customers at both the start and end of the participation process. Secondly, ensuring that participating SBL customers are aware of the other program opportunities designed with their business segment in mind.</p>	Medium	<p>The IESO will continue working with delivery vendors in SBP to ensure that participants are made aware of all available opportunities including other programs. The IESO has provided leave behind materials such as brochures with details of other available program offerings such as the Retrofit Program.</p>