2019 Interim Framework (IF) Small Business Lighting Program EM&V Key Findings and Recommendations

No.	PROGRAM	KEY FINDINGS	2019 EM&V RECOMMENDATIONS	IMPACT	IESO RESPONSE
1.	Small Business Lighting (SBL) Program	**Improved Baseline and Retrofit Photos.** In PY2019 SBL implementers submitted photos of the pre-existing baseline and retrofitted fixtures and lamps. These photos are important and helpful when verifying the baseline and retrofit measure types and wattages. In most cases, the photos submitted were taken from wide angles and from a few feet away, which do not provide useful information about the lamp wattage or lamp type. There were a few instances where the photos captured enough detail of the lamps or fixtures to definitively determine the wattages.	Specify what information should be captured in the pre-retrofit and post-retrofit pictures that are taken by the SBL assessors/installers. Specify that pictures of the replaced equipment should capture the wattage of the lamps and, if applicable, the type of ballast. This is specifically critical for direct install programs. The participants of such programs often do not possess sufficient information regarding the baseline and retrofit equipment, and the photos collected by the delivery agent would help provide the data required for evaluation.	High	The IESO strives to capture the best available information in work orders, which are verified by participants before installations. For future versions of the program, the IESO will consider more specific guidance on the details which should be captured within these photos.

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2.	Small Business Lighting (SBL) Program	**SBL Assessment Tool (Hours of Operation).** The 2019 SBL Program Assessment Tool used by the assessors and installers collects parameters necessary to calculate energy and demand savings and is simple to use. The evaluator understands that it is important not to complicate the Assessment Tool, but discrepancies between the operating schedules reported on the application and those verified in the field still contribute significantly to the realization rates being less than 100%. Currently, the Assessment Tool only accepts one schedule for the entire facility, and only accepts schedule inputs in terms of a weekly schedule, which is assumed to be constant over the entire year.	The evaluator recommends to upgrade the existing Assessment Tool, and allow for the creation of multiple schedules for the same facility, where measures can be properly assigned to their respective operating schedules. Additionally, allow the users to highlight the varying operation –seasonality– of the facility, if any. Alternatively, if there is a need to maintain the current Assessment Tool design, the evaluator recommends that clear instructions be provided to the assessors on what hours of operation should be entered in the SBL Assessment Tool. It should be clarified that the schedule entered in the hours of operation fields should be the hours that the new efficient lamps are expected to operate and not the hours of operation of the business. In many instances, the hours the business is open to the public are entered into the SBL Assessment Tool when in fact the lights are turned on when the business is closed to the public or some lights might be off during part of the business hours. Another option is to clarify in the Assessment Tool instructions and in contractor trainings that in cases where multiple schedules exist, the schedule entered should be for the lights that are expected to generate most of the energy savings.	High	A single weekly operating schedule is currently requested to minimize the level of information required by participants and simplify the participation process. The hours of operation are verified by participants prior to installation. For future versions of the program, the IESO will consider alternative approaches which balance the objective of keeping the program simple for participants while also improving realization rates.
3.	Small Business Lighting (SBL) Program	**SBL Assessment Tool (Reported Demand Savings).** The 2019 SBL Program reported demand savings reflect a change in connected load and are not adjusted for peak coincidence. IESO requires reporting net verified savings based on the summer peak demand definition.	The 2019 SBL Assessment Tool collects actual hours of operation data for each assessed facility. The evaluator recommends utilizing this data to calculate the corresponding portion of the change in the connected load that occurred during the peak window, or the peak coincidence factor (CF) of each project. This would help to correctly report summer peak demand savings. Alternatively, if there is a need to maintain the current Assessment Tool design, the evaluator recommends using a predefined peak coincidence factor (CF) based on 8760 load shapes available in IESO's Measures and Assumptions List (MAL) and libraries.	High	The IESO does not see the need to revise the SBL Assessment Tool since it collects the necessary information for the program evaluator to calculate net verified savings based on the summer peak demand definition. The demand savings calculation does not affect the program offering to the participant.

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4.	Small Business Lighting (SBL) Program	**Program free-ridership was very low.** The program's net-to-gross (NTG) was high (98.3%) with a very low free ridership (FR) at 4%. Two-thirds (66%) of participants were not planning on upgrading their lighting before they heard about the program. Of those that were already planning on upgrading their lighting, more than two-fifths (44%) would have waited at least one year and almost one-sixth (15%) would have installed less expensive or less efficient lighting without the program. Less than one-tenth (7%) would have installed the same lighting equipment and paid the full cost themselves. The low FR demonstrates that the program is largely reaching the participants who would not have made lighting upgrades without the program.	Maintain focus on minimizing FR. Key areas of focus include: identifying and targeting customers who would not make upgrades without program support identifying applicants who have not already begun implementing measures	Medium	The IESO will continue to identify and support businesses and projects that require the program to proceed with implementing energy-efficient measures. The IESO has instructed its program delivery vendor to specifically target independently-owned small businesses through outreach efforts.
5.	Small Business Lighting (SBL) Program	**Satisfaction with the program and its processes was high overall, but there is room for improvement.** Most participants had no suggestions for improving the initial site assessment (78%), the contractor visit(s) (79%), or the installation process overall (84%). Of those with suggestions, the most common were to shorten the time it takes to complete the visits (28% assessment visit; 19% contractor visit), improve the professionalism of the assessor or contractor (15% assessor; 30% contractor), and provide more flexibility in scheduling the visits (20% assessment visit; 21% contractor visit).	Shorten the time it takes to complete the assessment and contractor visits. Identify areas where additional program support or resources could make this easier for the assessors/contractors to accomplish. Provide additional training to assessors and contractors to ensure professionalism during assessments and contractor visits. Provide more flexibility in scheduling the visits (e.g. coordinating with participants to identify suitable times for the visit, providing accurate arrival windows).	High	Supporting businesses and providing high customer satisfaction are essential and additional precautions have been implemented to support businesses during the COVID-19 health emergency. Methods to improve customer satisfaction, including increasing scheduling flexibility, professionalism, and installation time will all be considered through future versions of the program. The IESO will continue to administer customer satisfaction surveys for the SBL program to monitor the program's performance and to measure the impact of any to the program on customer experience.

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6.	Small Business Lighting (SBL) Program	**Additional cross-program promotion opportunities exist.** Given that nearly three-fourths (73%) of participants had not applied to any other energy-efficiency programs in PY2019 besides the SBL program, opportunities exist to further promote the Save on Energy programs to SBL customers. For example, the Refrigeration Efficiency Program (REP) also targets the small business market and could be promoted to SBL participants during the application process and/or at the completion of the project.	Continue to identify cross-program promotion opportunities, especially with programs like REP, which target similar small business customers.	Medium	Cross-program opportunities will continue to be identified to support businesses. A network has been established between the IESO's small business lighting program delivery vendor and its Retrofit program delivery vendors to share qualified leads for the respective programs.
7.	Small Business Lighting (SBL) Program	**SBL Reporting and Tracking (Measure-Level Cost and Incentive).** The 2019 SBL Program reporting database is structured into two sets of data; one for projects' high level information such as address, contact information and business type, and the other set is for measures' information which details key aspects of the individual measures included within each project, such as quantity and type of equipment installed. Currently, incentive and cost data are reported on the project level, and no measure-level information is available.	Along with measure-specific energy and demand savings, the evaluator recommends reporting separate incentive and cost values for each measure, as opposed to reporting project-level incentive and cost. Having access to such information will increase the evaluation team's visibility into the program's performance, and allow the evaluator to run various analyses regarding the cost effectiveness and performance of each implemented measure type.	Low	The IESO will consider strategies to obtain more granular reporting on measure costs details in future versions of the program.