

ONTARIO ENERGY BOARD

IN THE MATTER OF sections 25.20 and 25.21 of the Electricity Act

AND IN THE MATTER OF a Submission by the Ontario Power Authority to the Ontario Energy Board for the review of its proposed expenditure and revenue requirements and the fees which it proposes to charge for the year 2011.

LOW-INCOME ENERGY NETWORK INTERROGATORIES FOR ONTARIO POWER AUTHORITY

A. REGARDING DIRECTIVE DATED OCTOBER 6, 2005 – CDM INITIATIVES FOR RESIDENTS OF LOW-INCOME AND SOCIAL HOUSING – REFERRED TO IN EXHIBIT A-5-1, PAGE 5 OF 6

1. Please provide a complete copy of the above low-income Directive.
2. Please provide:
 - 2a) the provincial socio-economic profile the OPA relied on as the basis for understanding the low-income market for the period of October 2005 to December 31, 2010;
 - 2b) the geographic distribution of low-income customers that OPA relied upon, if not part of the socio-economic profile;
 - 2c) the socio-economic profile by LDC;
 - 2d) the following information by Ontario low-income market segment – low-income homeowners, low-income renters in the private rental market, and low-income renters in assisted and social housing - for the period of October 6, 2005 to December 31, 2010 by year, and in total, starting in 2005 to 2010:
 - ▶ number of potential OPA CDM program participants
 - ▶ number of actual OPA CDM program participants
 - ▶ average electricity savings (kW and kWh) achieved/participant

- ▶ average dollars OPA spent directly to achieve energy savings only per participant
- ▶ total program dollars spent per participant;

2e) a description of each of the OPA low-income programs that OPA offered by year from 2005 to the end of December 31, 2010 that includes:

- ▶ total OPA program budget
- ▶ OPA full-time equivalents (“FTE’s”) allocated to the program and a description of where these positions are in the OPA organization
- ▶ total number of program participants
- ▶ type of measures included (technologies/equipment, services, capability building)
- ▶ total energy savings achieved (kW and kWh)
- ▶ any evaluations (process, impact, market, or some combination, or other) that OPA performed internally or that were performed by consultants retained by OPA, of which we request copies
- ▶ cost of each of the above evaluations
- ▶ an explanation of the value gained for the money spent on each of the above evaluations;

2f) a provincial picture of the success of the OPA low-income programs in aggregate from 2005 to the end of December 31, 2010, including:

- ▶ the OPA management process in place to track and report on progress on fulfilling the direction in the Directive, internally within OPA, to the OPA Board, and to the Minister/Ministry
- ▶ progress made toward achieving the Directive target of saving a total of 100 MW in low-income, assisted and social housing
- ▶ a description of remaining market barriers
- ▶ market penetration achieved
- ▶ lessons learned
- ▶ opportunities to increase market penetration and electricity savings for the period of January 1, 2011 to December 31, 2014.

B. REGARDING DIRECTIVE DATED JULY 5, 2010 – CDM PROGRAM UNDER THE GEA CONSERVATION FRAMEWORK: LOW-INCOME CONSERVATION INITIATIVE – REFERRED TO IN EXHIBIT A-5-1, PAGE 1 OF 6

3. Please provide a complete copy of the above low-income Directive.

4. Please provide:

4a) the provincial socio-economic profile the OPA is relying on as the basis for understanding the low-income market for the development of the low-income OPA-Contracted Province-Wide CDM Programs and low-income program components in non-low-income OPA-Contracted Province-Wide Programs for the 2011-2014 period;

4b) the geographic distribution of low-income customers that OPA is relying upon, if not part of the socio-economic profile;

4c) the socio-economic profile by LDC;

4d) the following information by Ontario low-income market segment - low-income homeowners, low-income renters in the private rental market, and low-income renters in assisted and social housing -forecasted for the 2011-2014 period by year, and in total:

- ▶ number of potential OPA CDM low-income program participants
- ▶ number of actual OPA CDM low-income program participants
- ▶ average electricity savings (kW and kWh) achieved/participant
- ▶ average dollars spent/participant directly to achieve energy savings only
- ▶ total program dollars spent/ participant;

4e) the following information by institutional and commercial consumers that own/operate/manage multi-family buildings with low-income residents, including assisted and social housing forecasted for the 2011-2014 period by year, and in total:

- ▶ number of potential OPA CDM program participants
- ▶ number of expected OPA CDM program participants
- ▶ average electricity savings (kW and kWh) achieved/building (excluding dwelling units)
- ▶ average dollars spent/building (excluding dwelling units) directly to achieve energy savings only
- ▶ total program dollars spent/building (excluding dwelling units);

4f) a description of each of the low-income OPA-Contracted Province-Wide CDM Programs and low-income program components in non-low-income OPA-Contracted Province-Wide Programs for the 2011-2014 period that OPA expects to offer;

4g) for each low-income OPA-Contracted Province-Wide Program and program component of a non-low income OPA-Contracted Province-Wide Program for each year of the 2011-2014 period:

- ▶ the total forecasted (actual for 2011 if available) budget
- ▶ the allocated FTE's and their organizational location
- ▶ a table showing the forecasted budget and electricity savings (kW and kWh) allocations by LDC, assuming all LDCs offer the OPA-Contracted Province-Wide related programs and components
- ▶ a description of the proposed monitoring, verification, and reporting process and metrics that will be reported by LDCs to the OPA and the OPA to the public on 2011 results, and for the 2011-2014 period;

4h) for each low-income OPA-Contracted Province-Wide Program and for each component of each non-low-income OPA-Contracted Province-Wide Program, when does the OPA expect:

- ▶ the program Schedule to the master agreement to be available for LDC registration, or latest draft Schedule if the final Schedule is not available
- ▶ the registered LDCs to launch the programs and program components;

4i) an explanation as to how each of the low-income OPA-Contracted Province-Wide Programs and program components of other non-low-income OPA-Contracted Province-Wide Programs will fulfill the direction during in 2011 and for the 2011-2014 period, for the OPA to emphasize deep measures such as thermal envelope and appliance replacement;

4j) OPA's overall strategy, plan and timetable for achieving this integration and the transition strategy for 2011 that will set the course for full and robust integration, given that OPA's Directive indicates that 2011 is a transition year regarding the development of a robust and integrated gas and electricity low-income strategy; and

4k) the OPA management process in place to track and report on progress in fulfilling the direction in the Directive, internally within OPA, to the OPA Board, and to the Minister/Ministry.

C. REGARDING DIRECTIVE DATED APRIL 23, 2010 – CONSERVATION AND DEMAND MANAGEMENT INITIATIVES UNDER THE GEA CONSERVATION FRAMEWORK– REFERRED TO IN EXHIBIT A-5-1, PAGE 1 OF 6

5. Please provide a complete copy of the above low-income Directive.

6. Please provide:

6a) the provincial socio-economic profile the OPA relied on as the basis for understanding the First Nations and Métis communities for the period prior to this Directive;

6b) the geographic distribution of these communities that OPA relied upon, if not part of the socio-economic profile;

6c) the socio-economic profile by LDC, where applicable;

6d) a program description of each of the OPA CDM program offerings for these communities that were available by year prior to this Directive, including:

- ▶ total program budget
- ▶ program measures (technologies/equipment, services, capability building, other)
- ▶ OPA FTE's assigned to the program and their location in the organization
- ▶ number of potential OPA CDM program participants
- ▶ number of actual OPA CDM program participants
- ▶ average electricity savings (kW and kWh) achieved/participant
- ▶ median energy savings (kW and kWh) achieved/participant
- ▶ internal program evaluations or program evaluations (process, impact, market, combination or other) that OPA performed internally or that were performed by consultants retained by OPA, of which we request copies
- ▶ cost of the above evaluations
- ▶ an explanation of the value gained for the money spent on each of the above evaluations;

6e) a provincial picture of the success of the above programs to the end of December 2010, including:

- ▶ a description of remaining market barriers
- ▶ market penetration achieved

- ▶ lessons learned
- ▶ opportunities to increase market penetration
- ▶ electricity savings for the 2011-2014 period;

6f) for each First Nations and Métis community's OPA energy efficiency and demand response program for each year of the 2011-2014 period:

- ▶ the total forecasted (actual for 2011 if available) budget
- ▶ the allocated FTE's and their organizational location for each 2011 offering
- ▶ a table showing the forecasted budget and electricity savings (kW and kWh)
- ▶ a description of the proposed monitoring, verification, and reporting process and metrics that OPA will employ; and

6g) the date when the OPA expects each First Nation and Metis community's OPA energy efficiency and demand response program to launch.

D. REGARDING STRATEGIC OBJECTIVE 2 - CONSERVATION -2.1 C - BUILDING CAPACITY OF THE CONSERVATION SERVICES INDUSTRY, THE CUSTOMER AND THE SUPPLY CHAIN TO ACCELERATE CONSERVATION

7. For the purposes of this question, please use the following definitions:

- a low-income program partner is an organization that is permitted by the OPA to work with the OPA without an OPA tendering process for the work, including, but not limited to:
 - ▶ a government ministry, agency or department,
 - ▶ First Nations and Métis governments,
 - ▶ First Nations provincial-territorial organizations (PTO),
 - ▶ any organization with responsibilities for energy conferred on it by a government;
- a low-income delivery agent delivers at least a part of an OPA low-income program on behalf of the OPA, whose services are tendered through the OPA tendering process;
- a low-income channel partner is an organization that assists the OPA in low-income program delivery but is not a delivery agent, for example, a community group may help with marketing the program, but would do so because it fits within the organization's mandate, its service would not be tendered.

Please provide:

7a) a second list of the above providing and using OPA definitions of these terms;

7b) by year from 2005 to present, a list of OPA's low-income CDM program partners, a list of OPA's low-income CDM delivery agents and a list of low-income CDM channel partners;

7c) a description of the process that the OPA uses to identify low-income program partners, delivery agents and channel partners;

7d) an explanation as to how the OPA ensures that economic efficiencies are achieved in the selection and management of each of the groups mentioned in section 7c;

7e) a description as to the existing Ontario industry CDM capabilities and programs for serving the low-income community, by organization and need, as available, and the industry capability needs for serving the low-income community;

7f) a description as to the criteria that the OPA uses to determine when there is inadequate CDM industry capability for serving the low-income community, and how they are applied; and

7g) a description:

- ▶ of any duplication in programs that existed between industry programs (e.g. government agencies and NGO's) and any OPA low-income programs over the period of 2005 to the end of 2010
- ▶ as to how the OPA dealt with this duplication over the period of 2005 to end of 2010
- ▶ of any expected duplication between industry programs and any OPA low-income program in the 2011-2014 period.

E. REGARDING THE DIRECTIVE TO THE OPA OF OCTOBER 6, 2005 WHICH REFERS TO THE "SOCIAL HOUSING ENERGY MANAGEMENT PILOT PROGRAM"

8. Please provide a complete copy of the Directive.

9. The Directive refers to The "Social Housing Energy Management Pilot Program" ("SHEMPP"), which Social Housing Services Corporation was running, funded through the Ministry of Energy's Conservation Partnership Program, and which provided a comprehensive energy management strategy for social housing providers, and directed the OPA to further pursue this initiative.

Please provide:

9a) a description, by year from 2005 to end of December 2010, as to how the OPA has pursued this initiative;

- 9b) the role that SHSC has played in each year;
- 9c) an explanation as to how the OPA intends to pursue this initiative in the period of 2011-2014;
- 9d) a description of the role that SHSC is expected to fulfill in the period of 2011-2014; and
- 9e) the OPA management process in place to track and report on progress in fulfilling all the direction in the Directive, internally within the OPA, to the OPA Board and to the Minister/Ministry.
10. Pursuant to the October 6, 2005 Directive, the OPA and SHSC signed a Memorandum of Understanding (MOU) to define the working relationship between the two parties, making SHSC the "designated exclusive partner of the OPA's social housing conservation and demand management programs".

Please provide:

10a) a description of each program, including:

- ▶ budget
- ▶ target audience
- ▶ measures

of the CDM programs for which the OPA partnered with SHSC for the purposes as set out in the MOU during the period in which the MOU was in effect (from December 22, 2005 to December 31, 2007);

10b) for each year that the MOU was in effect, a description of how the OPA fulfilled this MOU such that SHSC was the exclusive OPA partner on social housing related to CDM; and

10c) an explanation as to why the OPA did not renew the MOU in 2008 and beyond.

January 25, 2011

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ONTARIO ENERGY BOARD

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AND TO:

ALL REGISTERED INTERVENORS

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Electricity Act

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**LOW INCOME ENERGY NETWORK
INTERROGATORIES**

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