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BY E-MAIL AND WEB POSTING

July 31, 2019

To: All Regulated Price Plan (RPP) Pilot Project Proponents

**Re: RPP Pilot Final Results Reports
Board File No. EB-2016-0201**

This letter sets out the Ontario Energy Board's (OEB) updated expectations regarding the content of Final Results Reports for RPP Pilot projects.

Background

By letter dated November 14, 2018 (November Letter), the OEB provided direction to RPP Pilot project proponents as to the OEB's expectations regarding the content of Interim Results Reports and Final Results Reports. At that time, the OEB indicated that its review of the Interim Results Reports and other lessons learned may prompt it to update or revise expectations for the Final Results Reports.

The OEB's experience to date with interim results reporting has highlighted the need for: (i) additional information to be reported for the purposes of the Final Results Reports; and (ii) clarification as to the OEB's expectations in relation to certain elements that were previously identified as minimum requirements for both Interim and Final Results Reports. Additional reporting and detail are required to maximize the usefulness of the Final Results Reports for the OEB's evaluation of the efficacy of the RPP pilots and its consideration of next steps in the RPP Roadmap initiative to revamp the RPP over time.

Other than as described below, all requirements and expectations set out in the November Letter continue to apply.

For greater clarity, the OEB expects Alectra to prepare both its August 31, 2019 and December 31, 2019 reports in accordance with the OEB's updated expectations for Final Results Reports.

Additional minimum reporting requirements

In addition to the subsections listed in the November Letter, the Final Results Report should also contain the following new subsections:

- A subsection within the Data section that reports descriptive statistics for each of the treatment and control groups for the pilot treatment period, at a minimum describing each group's average monthly consumption in kWh, average monthly peak demand in kW, and average daily load curves and their associated standard deviations.
- A subsection of the Methodology section that describes the types of customers targeted, if any, or the basis on which certain customers were targeted (such as electric vehicle ownership, for example).
- A subsection within the Results section that reports pilot price plan and status-quo TOU revenue performance, identifying the total and average commodity cost for each treatment and control group.
- A subsection within the Results section that reports the distribution of pilot price impacts for each treatment group. It should describe the range of impacts across the group, preferably in the form of a histogram with summary statistics such as the mean and standard deviation.

Existing minimum reporting requirements where more detail is expected

Survey Results

As set out in the November Letter, the Results section is to include survey results where applicable. In addition to reporting overall results, proponents should discuss participant comprehension and customer satisfaction. Specifically, this section should include a discussion of the following, as applicable depending on the survey results:

- how well participants understood the pilot pricing structure
- how or the extent to which participant understanding of pilot prices contrasts with their understanding of the status quo pricing structure
- how or the extent to which participant understanding of either price plan (pilot or status quo) contrasts with that of control customers, if applicable
- participant understanding of the opportunity for bill savings and actions required to produce them
- participant levels of customer satisfaction both at the beginning and the end of the pilot period

Proponents should also use all available demographic, socioeconomic, and preference/attitude information captured within their surveys to describe treatment and control participants and identify whether any major commonalities or differences exist within or between treatment and control groups.

Lessons Learned, Etc.

As set out in the November Letter, the Conclusion section was expected to include discussion on lessons learned and on design, cost, efficacy, implementation, and other considerations for deployment at a broader scale. Reporting on these topics was very limited in the Interim Results Reports, and the OEB expects that Final Results Reports will include more detail on them.

To that end, the OEB recommends that proponents create a new section that summarizes all pilot design, set-up, vendor procurement, recruitment, and on-going implementation activities at an appropriate level of detail and in chronological order. Lessons learned, including challenges, and considerations for deployment at a broader scale should be discussed for each activity in this section.

The OEB also takes this opportunity to inform proponents that Navigant Consulting Ltd. has been retained to conduct a meta-analysis of the RPP pilot interim and final results to support the OEB's evaluation of the feasibility of implementing projects at a broader scale. Appendix A to this letter provides greater detail regarding Navigant's role and information needs. The OEB asks all RPP pilot proponents to provide such assistance and cooperation as Navigant may require over the coming months to support Navigant's work on behalf of the OEB.

Please direct any questions regarding the above to RPP.Pilots@oeb.ca.

Yours truly,

Original signed by

Martine Band
Associate General Counsel
Ontario Energy Board

APPENDIX A

In June 2019, the Ontario Energy Board (OEB) engaged Navigant Consulting Ltd. (Navigant) to review the Interim and Final results of the Regulated Price Plan (RPP) pilots to undertake an analysis of the RPP pilot interim and final results to support the OEB's consideration of new or modified pricing plans and non-price tools that might effectively deliver on the RPP objectives and can be implemented at a broader scale.

The core task of this engagement is a "meta-analysis" of the RPP pilots. This process has two main components: a pilot assessment, and a scaling assessment.

- *Pilot Assessment.* The pilot assessment consists of a retrospective assessment of pilot outcomes and relies mainly on the RPP pilot Interim and Final Results Reports and the output data that accompanies those Reports.
- *Scaling Assessment.* The scaling assessment is a prospective analysis of pilot outcomes intended to answer the question: how successfully could this pilot be scaled up to a wider implementation?

Navigant will begin contacting pilot proponents in August 2019 to arrange telephone interviews regarding pilot implementation. The purpose of these interviews is to get direct insights from program staff and obtain information and data to supplement the information included in the Results Reports, to support Navigant's analysis of pilot program successes and challenges and potential opportunities for wider implementation. The types of information Navigant will ask about in these interviews may include: successes and challenges including in relation to participant recruitment; insight into proponents' customer engagement strategies and any feedback received from customers related to those strategies; descriptions of the processes undertaken to administer the pilot treatment (e.g., billing, equipment deployment, etc.); insight into observed patterns of call centre interactions, etc.

Navigant will provide proponents with an interview guide ahead of time to facilitate the interviews and assist in helping pilot proponents identify which of their staff should take part. As needed, Navigant may follow up with requests for additional data and/or with additional calls or correspondence.