



# Ontario Energy Board Commission de l'énergie de l'Ontario

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## DECISION AND ORDER

EB-2015-0029 / EB-2015-0049

## UNION GAS LIMITED AND ENBRIDGE GAS DISTRIBUTION INC.

Applications for approval of 2015-2020 demand side management plans.

**BEFORE: Christine Long**  
Presiding Member

**Allison Duff**  
Member

**Susan Frank**  
Member

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February 24, 2016

The Ontario Energy Board (the OEB) indicated, as part of the Demand Side Management (DSM) Framework, that natural gas utilities should prepare formal multi-year plans to help natural gas customers access programs to conserve energy. Union Gas Limited (Union) and Enbridge Gas Distribution Inc. (Enbridge) filed separate applications with the OEB for approval of natural gas conservation and energy efficiency programs to be delivered to customers between 2015 and 2020 (Applications).

The OEB held an oral hearing, followed by written argument and reply submissions. On January 20, 2016, the OEB issued a Decision and Order (the Decision) on the gas utilities' respective DSM plans. The daily transcripts of the oral hearing, the evidence, written arguments and the Decision are on the OEB's website [www.ontarioenergyboard.ca](http://www.ontarioenergyboard.ca) under files number EB-2015-0029 and EB-2015-0049.

The Decision represented the OEB's final determination regarding most aspects of the applications. As part of the order; however, the OEB allowed the utilities to "provide written comments related to the calculation of target metric and allocation of shareholder incentive amounts included in Schedule A, B, and C." The purpose of this process was to allow the utilities to verify the accuracy of the "numbers" in the appendices of the Decision before rate orders were drafted.

The OEB received comments from both utilities, as well as a response from an intervenor. The OEB has reviewed all of the comments. Some of the submissions went beyond the intended scope of the comments process, and asked that the OEB make various changes to the Decision. As this was not the purpose of the comment process, the OEB has rejected these suggestions and will not comment on them further in the Decision. Enbridge also made some new requests, which will not be approved.

The OEB has determined that some comments, which are in scope, warrant an update to the Decision. These changes are set out below. Revised Schedules are included in the Appendices.

# 1 RESPONSE TO ENBRIDGE'S COMMENTS

## 1.1 Low-Income Scorecards

### 2015 Low-Income New Construction metrics

Enbridge noted that the Decision included Part 3 Participants Enrolled as a metric in the 2015 Low-income New Construction program. However, the metric is not related to the Low-income New Construction program, whose targets only begin in 2016.

#### Decision

The OEB agrees with Enbridge's comments. The revised program table is below. The "Proposed and Approved % Part 3 Participants Enrolled" metric has been removed.

Low-Income New Construction	2014 (actuals)	2015 (proposed)	2016	2017	2018	2019	2020
<b>Proposed &amp; Approved Budget</b>		\$250,000	\$1,116,696	\$1,200,000	\$1,400,000	\$1,428,000	\$1,456,560
Proposed Participant Target	Not offered	Not available	5	7	9	8	5
Approved Participant Target		Not available	6	Formula - see section 9.4			
TRC-Plus Ratio		Not applicable					

#### References:

2015 budget was part of Enbridge's incremental budget, not Enbridge's 2015 Low-Income budget, see Enbridge's DSM Plan: Exhibit B, Tab 1, Schedule 3, Page 16.  
2016-2020 budgets from Enbridge's IRR to GEC.11  
Approved 2016 target is explained in section 9.3

### 2016-2020 Low Income Metric Weightings

Enbridge noted a discrepancy between the metric weightings within the Low-Income scorecard between Schedule B and Schedule C, with Schedule B showing the correct weightings and Schedule C containing an error.

#### Decision

The OEB agrees with Enbridge's comments. The correct Low-Income scorecard weightings are in the revised Schedule C attached.

## 1.2 Demand Side Management Variance Account (DSMVA)

Enbridge requested the OEB clarify whether the 2015 unspent portion of the incremental budget could be included in the DSM Variance Account (DSMVA).

#### Decision

The OEB did not approve the deferral of the 2015 unspent portion of the incremental budget to another year.

## 2 RESPONSE TO UNION'S COMMENTS

### 2.1 Large Volume Scorecards

Union proposed 2017 and 2018 scorecards for the Large Volume program as only the 2016 scorecard was included in the Decision.

#### Decision

The 2017 and 2018 scorecards provided by Union omitted the 2% productivity improvement factor for the lifetime natural gas savings metric. The approved 2017 and 2018 Large Volume scorecards are shown below.

2017 Large Volume Rate T2/Rate100 Scorecard					
Program	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Large Volume Program For T2/R100 customers	Cumulative Natural Gas Savings (m <sup>3</sup> )	75% of Target	Three-year rolling average (2014-2016) Rate T2/Rate 100 cost effectiveness x the 2017 budget without overheads x 1.02	150% of Target	100%

2018 Large Volume Rate Rate T2/Rate100 Scorecard					
Program	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Large Volume Program For T2/R100 customers	Cumulative Natural Gas Savings (m <sup>3</sup> )	75% of Target	Three-year rolling average (2015-2017) Rate T2/Rate 100 cost effectiveness x the 2018 budget without overheads x 1.02	150% of Target	100%

### 2.2 Input Assumptions and Net-to-Gross Adjustments

Union interpreted the OEB's Decision to mean that input assumptions and net-to-gross adjustment factors are finalized for a given year based on the previous year's final DSM audit.

#### Decision

The OEB confirms that Union's interpretation is correct.

### 2.3 Optimum Home Metrics

Union provided comments related to two areas of its Optimum Home Scorecards: the 2016 Optimum Home Metric and its 2017-2018 Optimum Home Metrics. These are discussed below.

## 2016 Optimum Home Program Scorecard Metric

Union noted a calculation issue related to its 2016 Optimum Home metric, given Union's 2015 pre-audit achievement level and the 2016 formulaic metric target. Union indicated that if the 2015 post-audit achievement is the same as the pre-audit achievement, the 2016 upper band target would result in Union being required to ensure that 105% of homes built through the program are at least 20% above the 2012 Ontario Building Code (OBC) efficiency standards.

As a result, Union proposed that the upper band metric target be capped at 100%.

### Decision

The OEB agrees with Union that capping the 2016 upper band metric target for this program at 100% is appropriate. However, as the 2015 results have not been evaluated, the 2016 metric target remains a formula until the 2015 audit is complete.

The OEB has clarified the metric name as Union will be evaluated on the percentage of homes built at least 20% above 2012 OBC by participating builders. The updated scorecard is below and included in the Appendices.

Union Gas 2016 Market Transformation Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Optimum Home	Percentage of Homes Built (>20% above OBC 2012) by Participating Builders	75% of Target	2015 Actuals + 20%	150% of Target*	50%

\* 2016 Optimum Home upper band metric target is capped at 100% of homes built (>20% above OBC 2012).

## 2017-2020 Optimum Home Program Scorecard Metrics

Union proposed revised 2017, 2018, 2019, and 2020 Optimum Home scorecard metrics given the new 2017 building codes are not yet defined. The proposed scorecards are based on Union's previously approved 2012-2015 scorecards but with an accelerated timeline.

### Decision

The OEB accepts Union's 2017 and 2018 proposed Optimum Home scorecards with several modifications to lower and upper band metric targets to ensure they represent

75% and 150% target achievement, respectively. For 2019 and 2020, the mid-term review will reassess and set the targets.

Union Gas 2017 Market Transformation Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Optimum Home	Participating Builders (Regional Top 10)	8	10	15	20%
	Prototype Homes Built	22.5%	30%	45%	30%

Union Gas 2018 Market Transformation Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Optimum Home	Participating Builders (Regional Top 10)	6	8	12	10%
	Prototype Homes Built	45%	60%	90%	30%
	Percentage of Homes Built (>20% above OBC 2012) by Participating Builders	3.75%	5%	7.5%	10%

## 2.4 Union's Shareholder Incentive Amount in Rates

Union sought clarification from the OEB regarding its proposal to include, beginning in 2016, the DSM shareholder incentive in rates. The current process for both Union and Enbridge is to recover any earned shareholder incentive amount entirely through the disposition of the DSM Incentive Deferral Account.

### Decision

The OEB did not approve a change to the method for recovery of the DSM shareholder incentives in the Decision. Accordingly, Union has received no Order of the OEB allowing them to make any such changes.

### **3 DRAFT ACCOUNTING ORDER – DEMAND SIDE MANAGEMENT COST-EFFICIENCY INCENTIVE DEFERRAL ACCOUNT**

As part of the Decision, the OEB ordered the gas utilities to file a draft Accounting Order for the approved DSM Cost-Efficiency Incentive Deferral Account. Enbridge and Union filed draft Accounting Orders and OEB staff filed written comments on the draft Accounting Orders and suggested common wording for both gas utilities. The gas utilities filed written responses suggesting slight modifications to the account description proposed by OEB staff.

Union suggested removing the wording “as determined by the OEB” from the end of the account description as it was already captured in the account description. Union indicated that the OEB will review and approve any DSM Cost-Efficiency Incentive Deferral Account amounts within the context of Union’s and Enbridge’s annual disposition of DSM deferral accounts proceedings. Union sought to clarify its understanding that following the OEB’s approval, the gas utilities have discretion to use the amounts in a subsequent year over the 2015-2020 term, without requiring further OEB approval to use the funds.

Enbridge proposed some additional wording confirming that any Cost-Efficiency Incentive amounts will be subject to the OEB’s evaluation process. Enbridge made a similar revision as that proposed by Union related to the Cost-Efficiency Incentive amounts being approved by the OEB.

#### Decision

The OEB accepts Union's comment, supported by Enbridge, that further OEB approval is not required for the gas utilities to use the approved funds.

The OEB approves the following description for Union's DSM Cost-Efficiency Deferral Account:

The purpose of the DSMCEIDA is to record, as a credit in Deferral Account No. 179-150, the differences between Union Gas Limited’s (Union or the Company) annual approved DSM budget and the actual amounts spent to achieve the total aggregate annual lifetime savings (cumulative cubic metres of natural gas, or CCM) targets made up of all 100% CCM targets across all programs, in accordance with the program evaluation results. Any OEB-approved DSMCEIDA amounts will be available to use in meeting the Company’s targets in a subsequent year over the 2015-2020 DSM term.

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The OEB approves the following description for Enbridge's DSM Cost-Efficiency Deferral Account:

The purpose of the DSMCEIDA is to record, as a credit in Deferral Account No. 179-XXX, the differences between Enbridge Gas Distribution Inc.'s (Enbridge or the Company) annual approved DSM budget and the actual amounts spent to achieve the total aggregate annual lifetime savings (cumulative cubic metres of natural gas, or CCM) targets made up of all 100% CCM targets across all programs, in accordance with the program evaluation results. Any OEB-approved DSMCEIDA amounts will be available to use in meeting the Company's targets in a subsequent year over the 2015-2020 DSM term.

The OEB orders Union and Enbridge to file updated Draft Accounting Orders for final approval using the descriptions set out above. Enbridge shall also update its Draft Accounting Order filing to include the Account Number.



## 4 ORDER

### THE OEB ORDERS THAT:

1. Enbridge Gas Distribution Inc. and Union Gas Limited shall each file with the OEB, and shall also forward to intervenors, a draft Rate Order and updated draft Accounting Order reflecting the OEB's findings in this proceeding as soon as is practicable.
2. OEB staff shall file any comments on the draft Rate Orders with the OEB and forward to both Enbridge Gas Distribution Inc. and Union Gas Limited within three days of receiving the draft Rate Orders. If there are no comments from OEB Staff the OEB will approve the draft Rate Order.
3. If OEB staff file any comments, Enbridge Gas Distribution Inc. and Union Gas Limited shall each file with the OEB responses to any comments on their respective draft Rate Orders within three days of receiving the comments.

All filings to the OEB must quote the file numbers, EB-2015-0029 / EB-2015-0049, be made through the OEB's web portal at <https://www.pes.ontarioenergyboard.ca/eservice/>, and consist of two paper copies and one electronic copy in searchable / unrestricted PDF format. Filings must clearly state the sender's name, postal address and telephone number, fax number and e-mail address. Parties must use the document naming conventions and document submission standards outlined in the RESS Document Guideline found at <http://www.ontarioenergyboard.ca/OEB/Industry>. If the web portal is not available, parties may email their documents to the address below. Those who do not have internet access are required to submit all filings on a CD in PDF format, along with two paper copies. Those who do not have computer access are required to file 7 paper copies.

All communications should be directed to the attention of the Board Secretary at the address below, and be received no later than 4:45 p.m. on the required date.

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

Board Secretary

Tel: 1-888-632-6273 (toll free)

Fax: 416-440-7656

BoardSec@ontarioenergyboard.ca

With respect to distribution lists for all electronic correspondence and materials related to this proceeding, parties must include the Case Manager, Valerie Bennett at [valerie.bennett@ontarioenergyboard.ca](mailto:valerie.bennett@ontarioenergyboard.ca) and OEB Counsel, Michael Millar at [michael.millar@ontarionenergyboard.ca](mailto:michael.millar@ontarionenergyboard.ca).

**DATED** at Toronto February 24, 2016

**ONTARIO ENERGY BOARD**

Original Signed By

Kirsten Walli  
Board Secretary

**SCHEDULE A**  
**DECISION AND ORDER**  
**APPROVED ANNUAL BUDGETS AND TARGETS FOR ALL PROGRAMS**

**ENBRIDGE GAS DISTRIBUTION INC.**  
**(EB-2015-0049)**

**UNION GAS LIMITED**  
**(EB-2015-0029)**

**FINAL UNREVISED FEBRUARY 24, 2016**





**SCHEDULE B  
DECISION AND ORDER  
OEB-APPROVED SCORECARD WEIGHTING**

**ENBRIDGE GAS DISTRIBUTION INC.  
(EB-2015-0049)**

**UNION GAS LIMITED  
(EB-2015-0029)**

**FINAL REVISED FEBRUARY 24, 2016**

Enbridge Metric Weightings and Targets						
Resource Acquisition Programs	Proposed Metrics	2016 Utility-Proposed Metric Weightings	2016 OEB-Approved Metric Weightings	2016 Utility-Proposed Shareholder Incentive Weighting	2016 OEB-Approved Shareholder Incentive Weighting	OEB-Approved 2016 Target
Home Energy Conservation (HEC) Residential Adaptive Thermostats Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install Run-it-Right Comprehensive Energy Management (CEM) Small Commercial New Construction	Large Volume Customers Cumulative Natural Gas Savings	40%	40%	59%	65%	664.6
	Small Volume Customers Cumulative Natural Gas Savings	40%	40%			319.2
Home Energy Conservation (HEC)	Residential Deep Savings Participants	20%	20%			8259
<b>Low-Income Programs</b>						
Home Winterproofing	Single Family Cumulative Natural Gas Savings	45%	45%	18%	23%	31.8
Low-Income Multi-Residential	Multi-Residential Cumulative Natural Gas Savings	45%	45%			64.9
Low-Income New Construction	New Construction Program Participants	10%	10%			6
<b>Market Transformation &amp; Energy Management Programs</b>						
My Home Health Record (Opower)*	Cumulative Natural Gas Savings (m3)	5%	N/A	23%	12%	N/A
School Energy Competition	Schools	5%	10%			55
Run-it-Right	Participants	20%	20%			83
Comprehensive Energy Management (CEM)	Participants	20%	20%			7
Residential Savings by Design	Builders	10%	10%			33
	Homes Built	15%	15%			2751
Commercial Savings by Design	New Developments	15%	25%			33
New Construction Commissioning*	Enrollments	5%	N/A			N/A
Home Rating*	Ratings	5%	N/A			N/A
Energy Compass*	No metric proposed	0%	0%			0
Small Commercial & Industrial Behavioural*	No metric proposed	0%	0%			0
Energy Literacy	No metric proposed	0%	0%	0		

\* My Home Health Record, New Construction Commissioning, Home Rating, Energy Compass, Small Commercial & Industrial Behavioural were not approved

Union Metric Weightings and Targets						
Resource Acquisition Programs	Proposed Metrics	2016 Utility-Proposed Metric Weightings	2016 OEB-Approved Metric Weightings	2016 Utility-Proposed Shareholder Incentive Weighting	2016 OEB-Approved Shareholder Incentive Weighting	OEB-Approved 2016 Target
Home Reno Rebate Energy Savings Kits* Behavioural* Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install**	Cumulative Natural Gas Savings	75%	75%	70%	61%	1214.1
Home Reno Rebate	Home Reno Rebate Participants	25%	25%			3300
<b>Low-Income Programs</b>						
Home Weatherization Furnace End-of-Life Aboriginal	Cumulative Natural Gas Savings	60%	60%	26%	25%	37.8
Multi-family	Social and Assisted Multi-Family Cumulative Natural Gas Savings	35%	35%			16.2
	Market Rate Multi-Family cumulative savings	5%	5%			2.6
<b>Large Volume Programs</b>						
Large Volume Program	No metric proposed	(no scorecard)	100%	0%	9%	Section 5.29
<b>Market Transformation Programs</b>						
Optimum Home	Percentage of Homes Built (>20% above OBC 2012) by Participating Builders	100%	50%	2%	4%	2015 Actuals + 20%
Commercial New Construction	New Developments Enrolled	N/A	50%			8
<b>Performance-Based Programs</b>						
RunSmart	Participants	50%	50%	1%	1%	28
	Savings (%)***	0%	0%			2017 target = 10%
Strategic Energy Management	Participants	50%	50%			3
	Savings (%)***	0%	0%			2018 target = 5%

Notes:

\* Energy Savings Kit and Behaviour Programs were not approved

\*\* Union did not assign a CCM-based target for the Direct Install program because it was proposed as a pilot. OEB has approved a target for this program, as discussed in section 5.2.5

\*\*\* Performance-based Scorecard has the following weightings in the following years, all of which are approved:

2017: RunSmart Participants (20%), RunSmart Savings (60%), SEM Participants (20%), SEM Savings (0%)

2018: RunSmart Participants (10%), RunSmart Savings (40%), SEM Participants (10%), SEM Savings (40%)

2019-2020: RunSmart Participants (10%), RunSmart Savings (40%), SEM Participants (0%), SEM Savings (50%)



**SCHEDULE C  
DECISION AND ORDER  
OEB-APPROVED SCORECARDS**

**ENBRIDGE GAS DISTRIBUTION INC.**

**(EB-2015-0049)**

**UNION GAS LIMITED**

**(EB-2015-0029)**

**FINAL REVISED FEBRUARY 24, 2016**

Enbridge 2016 Resource Acquisition Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Energy Conservation (HEC) Residential Adaptive Thermostats Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install Run-it-Right Comprehensive Energy Management (CEM) Small Commercial New Construction	Large Volume Customers Cumulative Natural Gas Savings (m3)	498,464,605	664,619,473	996,929,209	40%
	Small Volume Customers Cumulative Natural Gas Savings (m3)	239,378,409	319,171,212	478,756,818	40%
Home Energy Conservation (HEC)	Residential Deep Savings Participants (Homes)	6,194	8,259	12,388	20%

Enbridge 2016 Low Income Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Winterproofing	Cumulative Natural Gas Savings (m3)	23,842,500	31,790,000	47,685,000	45%
Low-Income Multi- Residential	Cumulative Natural Gas Savings (m3)	48,675,000	64,900,000	97,350,000	45%
Low-Income New Construction	Number of Project Applications	4	6	8	10%

Enbridge 2017 Resource Acquisition Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Energy Conservation (HEC) Residential Adaptive Thermostats Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install Run-it-Right Comprehensive Energy Management (CEM) Small Commercial New Construction	Large Volume Customers Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 Large Volume Customers Resource Acquisition actual spend without overheads x 2017 Large Volume Customers Resource Acquisition budget without overheads x 1.02	150% of Target	40%
	Small Volume Customers Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 Small Volume Customers Resource Acquisition actual spend without overheads x 2017 Small Volume Customers Resource Acquisition budget without overheads x 1.02	150% of Target	40%
Home Energy Conservation (HEC)	Residential Deep Savings Participants (Homes)	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	20%

Enbridge 2017 Low Income Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Winterproofing	Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	45%
Low-Income Multi- Residential	Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	45%
Low-Income New Construction	Number of Project Applications	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	10%

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Enbridge 2018 Resource Acquisition Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Energy Conservation (HEC) Residential Adaptive Thermostats Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install Run-it-Right Comprehensive Energy Management (CEM) Small Commercial New Construction	Large Volume Customers Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 Large Volume Customers Resource Acquisition actual spend without overheads x 2018 Large Volume Customers Resource Acquisition budget without overheads x 1.02	150% of Target	40%
	Small Volume Customers Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 Small Volume Customers Resource Acquisition actual spend without overheads x 2018 Small Volume Customers Resource Acquisition budget without overheads x 1.02	150% of Target	40%
Home Energy Conservation (HEC)	Residential Deep Savings Participants (Homes)	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	20%

Enbridge 2018 Low Income Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Winterproofing	Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	45%
Low-Income Multi- Residential	Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	45%
Low-Income New Construction	Number of Project Applications	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	10%

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Enbridge 2016 Market Transformation & Energy Management Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
School Energy Competition	Schools	41	55	83	10%
Run-it-Right	Participants	62	83	124	20%
Comprehensive Energy Management (CEM)	Participants	5	7	10	20%
Residential Savings by Design	Builders	25	33	50	10%
	Homes Built	2063	2751	4127	15%
Commercial Savings by Design	New Developments	25	33	50	25%

Enbridge 2017 Market Transformation & Energy Management Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
School Energy Competition	Schools	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	10%
Run-it-Right	Participants	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	20%
Comprehensive Energy Management (CEM)	Participants	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	20%
Residential Savings by Design	Builders	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	10%
	Homes Built	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	15%
Commercial Savings by Design	New Developments	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	25%

Enbridge 2018 Market Transformation & Energy Management Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
School Energy Competition	Schools	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	10%
Run-it-Right	Participants	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	20%
Comprehensive Energy Management (CEM)	Participants	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	20%
Residential Savings by Design	Builders	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	10%
	Homes Built	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	15%
Commercial Savings by Design	New Developments	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	25%

Union Gas 2016 Resource Acquisition Scorecard					
Programs	Metrics	Metric Targets			Weight
		Lower Band	Target	Upper Band	
Home Reno Rebate Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install	Cumulative Natural Gas Savings (m3)	910,578,270	1,214,104,360	1,821,156,541	75%
Home Reno Rebate	Home Reno Rebate Participants (Homes)	2,475	3,300	4,950	25%

Union Gas 2016 Low Income Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Weatherization Furnace End-of-Life Aboriginal	Cumulative Natural Gas Savings (m3)	28,339,761	37,786,348	56,679,521	60%
Multi-family	Social and Assisted Multi-Family Cumulative Natural Gas Savings (m3)	12,162,016	16,216,022	24,324,033	35%
	Market Rate Multi-Family Cumulative Natural Gas Savings (m3)	1,979,863	2,639,817	3,959,726	5%

Union Gas 2017 Resource Acquisition Scorecard					
Programs	Metrics	Metric Targets			Weight
		Lower Band	Target	Upper Band	
Home Reno Rebate Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install	Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 Resource Acquisition actual spend without overheads x 2017 Resource Acquisition budget without overheads x 1.02	150% of Target	75%
Home Reno Rebate	Home Reno Rebate Participants (Homes)	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	25%

Union Gas 2017 Low Income Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Weatherization Furnace End-of-Life Aboriginal	Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	60%
Multi-family	Social and Assisted Multi-Family Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	35%
	Market Rate Multi-Family Cumulative Natural Gas Savings (m3)	75% of Target	2016 metric achievement (LRAM natural gas savings) / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.02	150% of Target	5%

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Union Gas 2018 Resource Acquisition Scorecard					
Programs	Metrics	Metric Targets			Weight
		Lower Band	Target	Upper Band	
Home Reno Rebate Commercial & Industrial Custom Commercial & Industrial Prescriptive Commercial & Industrial Direct Install	Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 Resource Acquisition actual spend without overheads x 2018 Resource Acquisition budget without overheads x 1.02	150% of Target	75%
Home Reno Rebate	Home Reno Rebate Participants (Homes)	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	25%

Union Gas 2018 Low Income Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Home Weatherization Furnace End-of-Life Aboriginal	Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	60%
Multi-family	Social and Assisted Multi-Family Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	35%
	Market Rate Multi-Family Cumulative Natural Gas Savings (m3)	75% of Target	2017 metric achievement (LRAM natural gas savings) / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.02	150% of Target	5%

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

Note: Metric achievement is calculated using verified program savings used for LRAMVA purposes

2016 Large Volume Rate T2 / Rate100 Scorecard					
Program	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Large Volume Program for T2/R100 customers	Cumulative Natural Gas Savings (m <sup>3</sup> )	75% of Target	Three-year rolling average (2013-2015) Rate T2/Rate 100 cost effectiveness* x 2016 budget without overheads x 1.1 x 0.75	150% of Target	100%

Note:

\*Cost-effectiveness = Final verified metric achievement used for LRAMVA purposes divided by final actual program spend for that year

2017 Large Volume Rate T2 / Rate100 Scorecard					
Program	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Large Volume Program For T2/R100 customers	Cumulative Natural Gas Savings (m <sup>3</sup> )	75% of Target	Three-year rolling average (2014-2016) Rate T2/Rate 100 cost effectiveness x the 2017 budget without overheads x 1.02	150% of Target	100%

2018 Large Volume Rate Rate T2 / Rate100 Scorecard					
Program	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Large Volume Program For T2/R100 customers	Cumulative Natural Gas Savings (m <sup>3</sup> )	75% of Target	Three-year rolling average (2015-2017) Rate T2/Rate 100 cost effectiveness x the 2018 budget without overheads x 1.02	150% of Target	100%

Union Gas 2016 Market Transformation Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Optimum Home	Percentage of Homes Built (>20% above OBC 2012) by Participating Builders	75% of Target	2015 Actuals + 20%	150% of Target*	50%
Commercial New Construction	New Developments Enrolled by Participating Builders	6	8	12	50%

\* 2016 Optimum Home upper band metric target is capped at 100% of homes built (>20% above OBC 2012).

Union Gas 2016 Performance-Based Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
RunSmart	Participants	21	28	41	50%
Strategic Energy Management (SEM)	Participants	2	3	5	50%

Union Gas 2017 Market Transformation Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Optimum Home	Participating Builders (Regional Top 10)	8	10	15	20%
	Prototype Homes Built	22.5%	30%	45%	30%
Commercial New Construction	New Developments Enrolled by Participating Builders	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	50%

Union Gas 2017 Performance-Based Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
RunSmart	Participants	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	20%
	Savings (%)	8%	10%	15%	60%
Strategic Energy Management (SEM)	Participants	75% of Target	2016 metric achievement / 2016 actual program spend without overheads x 2017 program budget without overheads x 1.1	150% of Target	20%

Union Gas 2018 Market Transformation Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
Optimum Home	Participating Builders (Regional Top 10)	6	8	12	10%
	Prototype Homes Built	45%	60%	90%	30%
	Percentage of Homes Built (>20% above OBC 2012) by Participating Builders	3.75%	5%	7.5%	10%
Commercial New Construction	New Developments Enrolled by Participating Builders	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	50%

Union Gas 2018 Performance-Based Scorecard					
Programs	Metrics	Metric Target			Weight
		Lower Band	Target	Upper Band	
RunSmart	Participants	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	10%
	Savings (%)	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	40%
Strategic Energy Management (SEM)	Participants	75% of Target	2017 metric achievement / 2017 actual program spend without overheads x 2018 program budget without overheads x 1.1	150% of Target	10%
	Savings (%)	4%	5%	8%	40%

**SCHEDULE D  
DECISION AND ORDER  
MID-TERM REVIEW REQUIREMENTS**

**ENBRIDGE GAS DISTRIBUTION INC.  
(EB-2015-0049)**

**UNION GAS LIMITED  
(EB-2015-0029)**

**FINAL UNREVISED FEBRUARY 24, 2016**

<b>MID-TERM REQUIREMENT</b>	<b>Enbridge</b>	<b>Union</b>	<b>Section of Decision</b>
Enbridge to explore an integrated program with electricity utilities related to adaptive thermostats	Yes		5.2.2
Union to file results of adaptive thermostat pilot program		Yes	5.2.3
Union to explore different conservation measures and technologies for a mass-market residential program		Yes	5.2.3
Gas utilities to provide evidence showing how it has lowered the free ridership rates of its custom programs	Yes	Yes	5.2.6
Enbridge to provide the evaluation results of the Small Commercial New Construction pilot program	Yes		5.2.7
Evaluation of the Energy Leaders Pilot Program results	Yes		5.2.8
Gas utilities to demonstrate that all low-income programs have a TRC-Plus results of at least 0.7	Yes	Yes	5.3
Gas utilities to provide summary of market needs and demonstration of how Market Transformation programs are prioritized	Yes	Yes	5.4
Gas utilities to consider the appropriateness of categorizing the Residential New Construction programs as Resource Acquisition programs	Yes	Yes	5.4.1
Gas utilities to provide evidence related to an integrated Energy Literacy program	Yes	Yes	5.4.9
Gas utilities to move RunSmart and Run-it-Right programs to Resource Acquisition scorecard	Yes	Yes	5.4.10
Gas utilities to move Comprehensive Energy Management and Strategic Energy Management programs to Resource Acquisition scorecard	Yes	Yes	5.4.11
Gas utilities to develop and expand access to bill for financing purposes related to energy efficiency investments	Yes	Yes	7
Gas utilities to provide evidence related to program overhead and portfolio overhead (or administration) costs	Yes	Yes	8.3
Gas utilities to provide evidence related to additional outcome-based performance scorecard metrics	Yes	Yes	9.2
Gas utilities to provide suggestions on appropriate changes to the target adjustment formula	Yes	Yes	9.4
Gas utilities to file evidence related to integrated conservation programs develop with the IESO	Yes	Yes	11
Gas utilities to file a transition plan to incorporate DSM into infrastructure planning activities	Yes	Yes	12