One-Stop Efficiency Shop® is a full-service rebate program available to small businesses in Xcel Energy’s Minnesota service territory with an electric demand of 400 kW or less. The program is designed to save business owners energy and money through the installation of energy efficient lighting by specifically targeting barriers that prevent small businesses from investing in energy efficiency products: limited financial resources and time, limited knowledge of lighting products and lack of access to quality contractors.

To address these issues the program offers:

- Substantial incentives combined with convenient and attractive financing
- Intensive marketing to bring the service to the customer, rather than relying on the customer to seek it out
- Objective recommendations backed by the credibility of Xcel Energy service
- A simple, one-stop service that holds customer time requirements to a minimum
- A computerized audit/data communication and reporting system that generates all site-specific paperwork

Evaluation of customers’ eligibility for Xcel Energy’s Saver’s Switch™ for Business project and survey of customers’ motors, heating/air conditioning equipment and compressed air systems to determine if they are eligible for other Xcel Energy programs.

Since 2000 the program has saved 126 MW, 457,000 MWh and has disbursed $55 million in rebates to 14,140 program participants. Participating business owners will save $558 million over the life of the new lighting equipment they have installed. The One-Stop Efficiency Shop staff achieved these savings while serving the small business sector where over 50% of program upgrades were completed at premises with a peak demand of 50 kW or less. This sector still represents a significant amount of opportunity as many small business owners have yet to upgrade their lighting and rapidly evolving technologies, like light emitting diodes (LEDs), promise even deeper savings in the near future.

In addition to the benefits realized by participants, the program has also had significant impacts on electric rates in Minnesota. Conservation Improvement Programs (CIP), like the One-Stop Efficiency Shop, are directly responsible for reducing electric rates for all ratepayers. Through its CIP programs in Minnesota, Xcel Energy has eliminated 7,760 GWh of demand. This has allowed Xcel Energy to avoid building nearly twelve, 250 MW power plants. The One-Stop Efficiency Shop accounts for 457 GWh of this reduction or $226 million in avoided costs for ratepayers.
The One-Stop Efficiency Shop has also preserved and created high quality jobs for local vendors and Minnesota small business owners. Over the course of the program, the One-Stop Efficiency Shop has partnered with over 900 lighting suppliers and electrical contractors. An estimated $140 million has been funneled back into the Minnesota economy through vendors who have worked with the program. In addition to direct jobs that are created from installing new lighting systems, there are jobs benefits for the businesses that receive services through the One-Stop Efficiency Shop. By upgrading to efficient lighting, participating businesses save money on utility bills which can be reinvested into the business and its employees.

An estimated $140 million has been funneled back into the Minnesota economy through vendors who have worked with the program.

The significant savings the One-Stop Efficiency Shop has generated for businesses and ratepayers confirms that the program’s full-service design for implementing energy savings in the small business sector has been a successful approach. The One-Stop Efficiency Shop specifically addresses inefficient lighting technology, which accounts for a significant portion of energy use and demand in small businesses. These proven, energy-saving retrofits are embedded within a package of attractive incentives, unbiased recommendations and the necessary resources to implement the project. This package is then presented to potential program participants by sales-oriented program staff that identifies the specific needs of each business owner and shows them how energy efficiency can meet those needs.

CEE believes it has found the right combination of incentives, technology and marketing to deliver an effective lighting retrofit program to the small business sector. This report provides a detailed evaluation of the One-Stop Efficiency Shop program from 2000-2015 and includes sections pertaining to program history, who we serve, vendor participation, implementation, lighting technology, inspections and customer satisfaction survey results.
2. PROGRAM HISTORY

On February 7th, 2000 the Minnesota Department of Commerce approved the implementation of the One-Stop Efficiency Shop lighting program as part of Xcel Energy’s 2000-2001 CIP. During the first few months of the program, CEE learned that although fundamental to the success of the program, attractive rebates and low interest financing were only one part of the equation. At $437 per kW saved, up to 60% of the installation cost, the One-Stop Efficiency Shop offered one of the highest rebates available to Xcel Energy small commercial customers, but this alone was not enough to convince business owners to participate. Many business owners are not knowledgeable about lighting and are not easily convinced that efficient technology will provide adequate lighting. Others may have tried retrofitting previously when the technology was not as reliable, had a bad experience and are hesitant to try it again.

At the beginning of the program these concerns were not adequately taken into account and too much emphasis was placed on completing audits with a lesser priority placed on follow-up and implementation. CEE realized that this approach was not productive and that the proposed energy savings were not being achieved. CEE reorganized the program in January 2001 and placed more emphasis on promoting implementation to the customer instead of making completion of the audit the primary focus.

The results of this refocused effort were almost immediate. During the first half of 2001, the sales rate increased 50% and the average kW saved per week almost doubled. CEE requested and the Department of Commerce approved a one-year extension of the One-Stop Efficiency Shop for 2002. The savings goal was set at 1,600 kW and two additional, full-time auditors were hired. Over the course of the year, the program generated savings that exceeded goals by 51%. In each of the following years, the One-Stop Efficiency Shop has continued to meet or exceed program goals. In 2015, CEE saved 10,952 kW and 52,845 MWh. Figure 1 shows annual One-Stop Efficiency Shop program goals compared to actual achievement since 2000. In 2013, program savings did trend back downward compared to achievement in 2012. The primary reasons for this are the application of Energy Independence and Security Act (EISA) wattages to 2013 reportable savings and the elimination of most rebates for T12 retrofits.
Although accurate audits and incentives are fundamental to the success of the program, educating the customer and marketing the program to address their specific needs is just as, if not more, important. Auditors do not assume that rebates and energy savings will be enough to convince customers to participate. Instead, they work closely with the customer to find out exactly what their lighting needs are and to explain how the One-Stop Efficiency Shop can meet these needs.
3. WHO WE SERVE

The purpose of the One-Stop Efficiency Shop is to serve the small business sector which has historically underutilized energy efficiency rebate programs. This sector includes the smallest businesses that have the fewest resources and greatest barriers to overcome in order to participate. Over the course of the program CEE has served a wide range of customers, including those with the smallest demands.

Since 2000, One-Stop has rebated 14,140 lighting projects for participating businesses. Overall, 53% of these projects have been completed at premises with a rated demand of 50 kW or less. In 2015, premises with less than 50 kW customer peak demand represented 57% of all One-Stop Efficiency Shop program participants. Premises with less than 100 kW demand represented 74% of all program participants.
Figure 2 shows the distribution of participants by customer peak demand over the life of the program and for 2015 only. The percentage of premises in the 0 kW to 25 kW demand range continues to outpace historical trends. This is consistent with smaller energy users comprising the majority of businesses that have not yet participated in the program, and also reflects CEE’s more focused efforts to reach out to the smallest and hardest to serve market segment.

Figure 3 shows the types of businesses that utilize the One-Stop Efficiency Shop and how much each class contributes to the overall kW and kWh savings for the program. Out of all classifications, service oriented businesses have contributed the most kW and kWh savings. Overall, services and retail make up the largest percentage of the total for all classifications and savings, but as the chart indicates, the program serves a full range of customers.
MAP 1 | PARTICIPATION IN GREATER MINNESOTA BY COUNTY 2000-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>% of Program Total</th>
<th>Customer KW Savings</th>
<th>KWH Savings</th>
<th>Installed Cost</th>
<th>Annual Savings</th>
<th>Rebates</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000-2015</td>
<td>2,543</td>
<td>18%</td>
<td>20,697</td>
<td>68,860,110</td>
<td>$21,695,774</td>
<td>$5,489,318</td>
<td>$8,895,939</td>
</tr>
<tr>
<td>2015</td>
<td>307</td>
<td>16%</td>
<td>1,353</td>
<td>5,812,321</td>
<td>$2,296,121</td>
<td>$594,626</td>
<td>$758,126</td>
</tr>
</tbody>
</table>
Some of the most difficult to serve customers are located in Greater Minnesota and in economically strained corridors in Minneapolis and St. Paul. Program staff has made delivery of the program to these areas a priority. This not only includes scheduling audits and promoting implementation in individual businesses, but also working with local vendors to educate them about the program so they consider potential applications for energy efficiency when they are working with their customers.

The City of Slayton in southwestern Minnesota is an example of the success the program has had in generating implementation in areas that have not historically participated in energy efficiency programs. Small towns can be difficult to serve because they have not been traditionally targeted by energy efficiency marketing campaigns and can be very skeptical of outside influences. However, once one or two business owners experience the benefits of the One-Stop Efficiency Shop, the close knit community of a small town is an ideal avenue for promoting the program to more businesses.

CEE initially introduced the One-Stop Efficiency Shop to Slayton city officials and educated them on the potential benefits of retrofitting the city’s buildings. The city soon approved and implemented the project. They were so pleased with the results that CEE was able to partner with them to market the One-Stop Efficiency Shop to local business owners and to date a total of 36 businesses have participated in the program. Several other business owners located in cities in the surrounding area have also already upgraded their lights or expressed an interest in the program based on business owners’ experience in Slayton.

Map 1 shows the work that CEE has done with the One-Stop Efficiency Shop in Greater Minnesota. Over the life of the program, 18% of program participants have been located in Greater Minnesota. Each number represents audits CEE has completed in a given county. To date, 2,543 businesses have completed retrofits for a total savings of 20,697 customer kW. In 2015, 307 businesses completed retrofits for a savings of 1,353 customer kW.
MAP 2 | PARTICIPATION IN PRIORITY CORRIDORS

- **2000-2015**
  - 651 RETROFITS COMPLETED
  - 5% % OF PROGRAM TOTAL
  - 6,523 CUSTOMER KW SAVINGS
  - 23,169,319 CUSTOMER KWH SAVINGS
  - $7,414,883 INSTALLED COST
  - $1,852,697 COST SAVINGS
  - $2,832,736 TOTAL REBATES

- **2015**
  - 97 RETROFITS COMPLETED
Map 2 gives an overview of program activities in economically stressed corridors of Minneapolis and St. Paul. Businesses in priority corridor comprise 5% of all program participants over the life of the program. That represents 651 participants during 2000-2015 resulting in $1,852,697 per year of electric energy cost savings and a reduction of 6,523 customer kW in these corridors. Participants in 2015 totaled 97 which resulted in savings of 362 customer kW.

Moving forward, CEE will remain focused on these areas with the objective of generating a higher rate of implementation among businesses that complete audits through the program. CEE continues to develop additional marketing strategies for these businesses, including more innovative financing tools and more effective partnerships with local business associations and other entities working toward promoting energy efficiency.

Program audits are generated from several sources. Since the beginning of the program CEE has employed a telemarketing firm to contact eligible customers and schedule audits. A database of qualified customers, provided by Xcel Energy, is used to generate audit leads. CEE has also provided a calling script and has instructed callers on how to determine which customers are the best potential candidates for an audit. This screening process includes questions concerning hours of operation, whether the customer owns or leases and whether the business has had a lighting retrofit in the last ten years.

Many program participants are also a result of referrals submitted by customers, Xcel Energy or vendors. Developing strong vendor relationships is critical to the implementation of the program and staff consistently makes an effort to promote the One-Stop Efficiency Shop to new vendors so they can pass the benefits on to their customers. As the One-Stop Efficiency Shop has become more widely known, more vendors have learned about the potential benefits of the program for their customers and referrals have become a significant portion of program audits.

“Developing strong vendor relationships is critical to the implementation of the program and staff consistently makes an effort to promote the One-Stop Efficiency Shop to new vendors so they can pass the benefits on to their customers.”
When designing the One-Stop Efficiency Shop, CEE believed it was necessary to have a pool of qualified contractors available for program participants who did not have a contractor and who would not want to take the time to collect bids. CEE sent out a broadcast fax through the Minnesota Electrical Association to all electrical contractors in the metro area licensed by the state of Minnesota. Interested contractors were asked to attend a contractor orientation meeting. Since 2001 a core group of contractors has completed retrofits for the program and is essential to creating a true “one-stop” program. Program contractors remain a critical resource for businesses that do not work with an electrical contractor on a regular basis. However, One-Stop Efficiency Shop staff also makes a concerted effort to market the program to and educate other contractors and suppliers whose customers can benefit from the services and rebates the program offers. These relationships require time to build, as well as consistent attention to maintain a level of trust and service so that vendors know they can rely on the program to serve their customers effectively and efficiently.

Since 2000, the One-Stop Efficiency Shop has worked with over 900 different vendors to provide audit services and rebates to their customers. This has resulted in approximately $140 million being funneled back into the Minnesota economy. This influx of money into the state’s economy has not only generated jobs for vendors who work with the program but also for participating businesses due to savings realized from reduced energy use. CEE estimates that for the past twelve years the One-Stop Efficiency Shop has supported the equivalent of a company that employs 161 full-time people.5

FIGURE 4 | ONE-STOP EFFICIENCY SHOP INSTALLATIONS

...$140 million being funneled back into the Minnesota economy.
5. IMPLEMENTATION

Through 2015, the One-Stop Efficiency Shop has submitted 14,140 jobs for rebates for a total savings of 126 MW and 457,000 MWh. One-Stop Efficiency Shop customers have received an average rebate of $3,910 and are saving an average of $2,631 per year.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>AUDITS</th>
<th>INSTALLED</th>
<th>KW SAVED</th>
<th>KWH SAVED</th>
<th>ANNUAL SAVINGS</th>
<th>TOTAL REBATE</th>
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<tr>
<td>2000</td>
<td>215</td>
<td>12</td>
<td>55</td>
<td>198,591</td>
<td>$10,888</td>
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<td>2001</td>
<td>844</td>
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<td>2419</td>
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<td>2003</td>
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<td>2928</td>
<td>9,891,469</td>
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<td>2004</td>
<td>1169</td>
<td>332</td>
<td>3718</td>
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<td>$725,004</td>
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<td>2005</td>
<td>1578</td>
<td>402</td>
<td>5971</td>
<td>22,175,980</td>
<td>$1,179,450</td>
<td>$2,425,807</td>
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<tr>
<td>2006</td>
<td>1326</td>
<td>524</td>
<td>6432</td>
<td>24,869,774</td>
<td>$1,373,310</td>
<td>$2,616,508</td>
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<tr>
<td>2007</td>
<td>1724</td>
<td>617</td>
<td>7800</td>
<td>30,957,418</td>
<td>$1,996,613</td>
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<td>2008</td>
<td>2325</td>
<td>817</td>
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<td>$2,267,026</td>
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<td>1122</td>
<td>10,798</td>
<td>43,165,144</td>
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<td>2011</td>
<td>2941</td>
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<td>11,866</td>
<td>41,228,687</td>
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<tr>
<td>2012</td>
<td>3067</td>
<td>1888</td>
<td>17,555</td>
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<td>2013</td>
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<td>1447</td>
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<td>33,764,581</td>
<td>$2,929,352</td>
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<tr>
<td>2014</td>
<td>3756</td>
<td>1715</td>
<td>10,601</td>
<td>43,188,540</td>
<td>$4,344,621</td>
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<tr>
<td>2015</td>
<td>4782</td>
<td>1970</td>
<td>10,952</td>
<td>52,845,591</td>
<td>$5,183,512</td>
<td>$6,136,026</td>
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</table>
The equipment most frequently retrofitted in the One-Stop Efficiency Shop program includes: fluorescent T12’s, fluorescent T8’s (in circumstances where the lamp wattage is reduced), high intensity discharge lamps (HIDs) and incandescents. During the first three years of the program, the most common lighting systems targeted for replacement were T12 standard fluorescents and incandescents. However, in 2003 the replacement of HID technology, particularly metal halides, became much more prevalent due to improvements in 6-lamp and 8-lamp T8 fixtures. From 2006 to 2010, replacement of HIDs with T8 technology was the largest overall contributor to program energy savings, averaging 40% of the total.

This trend continued until 2011 when T12 retrofits again became the primary generator of program savings. This is principally due to EISA. EISA eliminated the manufacture of non-compliant T12 lamps starting in July of 2012. As a result, rebates for T12 retrofits were either eliminated or significantly reduced in 2013. Many business owners with T12s retrofitted them in 2012 to take advantage of the rebates while they were still available.

From 2012 to 2013, rebates disbursed for T12 retrofits dropped by almost half. In 2015, T12 retrofits continued to decline, representing only 3% of the savings generated by the program. Although there are still rebates available for T12 retrofits that exceed EISA baselines, they are minimal compared to historical levels. Industry trends indicate that T12 retrofits will continue to decline as a percentage of program retrofits as stock in the marketplace dwindles.

Not surprisingly, the most important trend continues to be the increase in savings generated by retrofitting to LEDs. The savings from LEDs has doubled each year from 2010 through 2014. In 2015, savings from installation of LEDs were 50% higher than in 2014. LEDs now represent nearly 86% of program savings. As prices continue to drop and the technology improves, LED lamps remain a reliable alternative for businesses with existing incandescent or compact fluorescent lamps. Exterior lighting applications like wall packs, canopies and soffits are also good candidates for LED replacement technologies.

The upgrade of existing HID and fluorescent fixtures with LED fixtures and tubes continues to grow as prices decrease and more manufacturers are producing quality products. In 2015, LED tubes accounted for approximately 17% of program savings and continue to capture an increasing market share, especially with the development of reliable products that can operate on existing T8 ballasts. Although both LED fixtures and tubes are still relatively expensive compared to T8 technology, their contribution to program savings will increase as prices fall and quality improves.
Figure 5 shows the total annual savings contribution of each type of lighting retrofit through 2015. HID retrofits currently represent 27% of the total customer kW saved over the course of the program. T12 retrofits represent 26% and incandescent retrofits represent 15% of the total. LEDs now represent 17% of total program savings since 2000.
Figure 6 further breaks out the primary combinations of existing and replacement technologies addressed by the program in 2015. In 2015, the replacement of incandescents with LED technology generated the most kW savings at 42% of the program total. The next most common retrofit was fluorescent to LED at 20% of the total kW savings.6

With the enactment of EISA and the rapid advances taking place at the technological level, specifically with LEDs, the lighting landscape continues to change, present new challenges and promise continued opportunity. There are still many small businesses owners who have not upgraded their lighting and developments in the industry point toward a future where even businesses that upgraded five to ten years ago could realize further savings by installing the next generation of lighting. While it will be more challenging to find savings in the short term as the industry continues to shift toward LEDs, lighting retrofits remain and will continue to remain one of the most cost-effective ways to reduce energy use in the small business sector.
In 2015, CEE commissioned an independent benchmarking study of other full-service, small business rebate programs in North America. The consultant hired to conduct the study collected public documents and interviewed program administrators from 13 different programs in the United States and Canada. Even though many of the other programs offer rebates for non-lighting measures, most of the programs are still primarily lighting programs, generating 85% or more of their gross savings from lighting measures.

"The results of the study show that the One-Stop Efficiency Shop is best in class."
The results of the study show that the One-Stop Efficiency Shop is best in class. Customer incentives paid by the One-Stop Efficiency Shop are 66% lower than average. CEE delivers the One-Stop Efficiency Shop at an operating cost that is 50% less than the average. The One-Stop Efficiency Shop’s savings per participant is 70% higher than the average. The study also identified some ways in which the One-Stop Efficiency Shop can continue to improve by adding focused non-lighting measures, personalized marketing and closing more projects through increased incentives. The figures below illustrate how the One-Stop Efficiency Shop compared to similar programs based on savings per participant, incentive levels, uptake ratio and total program cost.
7. INSPECTIONS & SURVEYS

To ensure quality installations and customer satisfaction, CEE performs random inspections on a minimum of 10% of program participants. The inspections include verifying that all specified equipment is installed and installed properly, as well as surveying the customer on the performance of their auditor and contractor. Since 2000, CEE has performed inspections on 13% of the installations.8 CEE also sends a post-installation questionnaire to the One-Stop Efficiency Shop participants who complete a retrofit. The questionnaire is normally sent out after the customer has had several months to experience the new lighting and can provide an informed response as to whether or not the One-Stop Efficiency Shop was beneficial.

<table>
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<th></th>
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</thead>
<tbody>
<tr>
<td>RETROITS</td>
<td>135</td>
<td>250</td>
<td>282</td>
<td>332</td>
<td>402</td>
<td>525</td>
<td>617</td>
<td>817</td>
<td>1,138</td>
<td>1,122</td>
<td>1,489</td>
<td>1,888</td>
<td>1,447</td>
<td>1,715</td>
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<tr>
<td>INSPECTIONS</td>
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<td>30</td>
<td>35</td>
<td>89</td>
<td>79</td>
<td>86</td>
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<td>180</td>
<td>204</td>
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<td>180</td>
<td>210</td>
</tr>
<tr>
<td>PERCENTAGE</td>
<td>13%</td>
<td>26%</td>
<td>11%</td>
<td>11%</td>
<td>22%</td>
<td>15%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
<td>12%</td>
<td>10%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Overall, satisfaction with the program has remained consistently high. In 2015, 1,026 surveys were returned and 96% of respondents reported being “very satisfied” or “satisfied” with the One-Stop Efficiency Shop. Since the beginning of the program approximately 8,800 surveys have been returned and of the participants who answered the question, 96% are either “very satisfied” or “satisfied” with the program. Figure 11 shows a summary of survey results from 2000-2015.

“...approximately 8,800 surveys have been returned and of the participants who answered the question, 96% are either ‘very satisfied’ or ‘satisfied’ with the program.”

FIGURE 11 | ONE-STOP EFFICIENCY SHOP POST-INSTALLATION QUESTIONNAIRE RESULTS 2000-2015
CEE is happy to provide this evaluation of the One-Stop Efficiency Shop. We value the strong working relationship we have developed with Xcel Energy and believe the program provides excellent energy efficiency services to small business customers. If you have any questions or require additional information about the program, contact Kristen Funk at (612) 335-3487 or kfunk@mncee.org.

1 Equipment lifetime is estimated at 15 years.
2 Conversation with Xcel Energy, April 12, 2016.
3 Service industries include: amusement and recreation, automotive dealers, gasoline service stations, automotive repair, business services, engineering, accounting, research, management, health services, investment offices, hotels, legal services, membership organizations, personal services, real estate and social services.
4 Priority corridors were defined by the McKnight Foundation and include Broadway Avenue, Lake Street, Central Avenue, Franklin Avenue, Payne Avenue and Hiawatha Avenue.
5 The job creation numbers calculated by CEE are a conservative estimate. They do not include the jobs that are created from administering the One-Stop Efficiency Shop, primarily at CEE and Xcel Energy. They also do not include the indirect jobs that result from the manufacturing and sales of lighting equipment, which accounts for more than half of the total installed costs. The number of contractor jobs is derived from the portion of the total installed cost that is attributable to labor. The number of jobs is calculated by dividing the total billed labor by the cost of employment in the relevant trades.

The jobs benefits at participating businesses are calculated using a CEE database of the industry classes that have been served by the program and calculating the cumulative electricity and dollar savings per industry per year. It is assumed that labor is 50 percent of a businesses’ budget so that 50 percent of the savings can be used to hire or retain personnel. This is a rough assumption, but reasonable given that One-Stop Efficiency Shop participants are small and a majority are in the service trades, which have a higher percentage of employee costs compared to heavy industry and manufacturing. The Minnesota average wages per industry are determined from the Bureau of Labor Statistics Quarterly Census of Employment and Wages, and fringe costs are assumed to be 30 percent of the total cost of the employee.

6 The “Other” category includes retrofit combinations that individually represent 1% or less of total program savings. The “Removed” category represents situations where the number of fixtures was reduced. Low Watt T8’s include 25W and 28W T8 lamps used to replace 32W T8 lamps.
7 The consultant was unable to collect accurate data for all programs for every metric. The graphs only include programs where the data was satisfactorily verifiable by the consultant.
8 No inspections were completed in 2000 due to the small number of installations.