



May 15, 2023

**MEMORANDUM**

**TO:** MTAB

**FROM:** Margie Gardner

**SUBJECT:** Materials for Agenda Item #6 - Overall RFI/MTI Process

At the MTAB Nominee Orientation in April, we reviewed the market transformation initiative (MTI) development process, including the launch of a Request for Ideas (RFI) portal to gather market transformation (MT) ideas from a broad audience. We will dive into this material again at the upcoming meeting, and also briefly walk through the contents of the documents you will be receiving during the MTI development process. We hope this gives you a good idea of what you will be reviewing.

The outlines for these key documents can be found in the materials for the May MTAB meeting on our website, CalMTA.org under these titles:

Agenda Item 6a. Outline of the “**RFI Disposition Report.**” This document will summarize the ideas collected through the RFI process as the first batch to score and prioritize. It will recommend the top 15-20 ideas to move to Stage 2: Concept Development and Assessment and will show all ideas with their scores reported in bins. We anticipate having a draft to share at the MTAB in November 2023.

Agenda Item 6b. Outline of an “**MTI Advancement Plan.**” An MTI Advancement Plan will be written for high priority MTIs that are recommended to move into Phase II: Program Development. It will identify the activities to be conducted in Phase II in order to write a complete MTI Plan. We expect to have one to four Advancement Plans for MTAB review in November 2023, assuming we receive ideas that can be moved forward quickly - our “front runners.”

Agenda Item 6c. Outline of an “**MTI Plan.**” For a proposed MTI to move into Phase III: Market Deployment, it will need to have an MTI Plan approved by the CPUC. The contents of the MTI Plan are pulled from D.19-12-021<sup>1</sup> and were organized into this outline. We are targeting at least one, but hopefully a handful, of MTI Plans will be ready to file in an Application to the CPUC at the end of 2024.

I look forward to discussing these items at the meeting.