



Agenda Item 6(a)

Draft RFI Disposition Report Outline

I. Executive Summary

- a. Background on CalMTA
- b. Purpose and scope of this report
- c. RFI context such as release and due dates and number of submissions received
 - i. Results: MTIs recommended to move to Phase II
- d. Describe appendices

II. Introduction

- a. MTA background and development in California
- b. Resource Innovations' role
 - i. Team roles and responsibilities
- c. MTAB composition and role
- d. Overview of MTA approach to soliciting, screening, and vetting MTI proposals

III. Development Process

- a. Criteria and weighting
 - i. Table of criteria and weightings
- b. Intake Process
 - i. Overview of the submitter's process including:
 - Intake question and format
 - Anticipated touchpoints with the submitter
 - Resources available for the process
 - ii. Intake process graphic
- c. Scoring Process
 - i. Overview of our scoring process
 - Describe the three "layers":
 - Threshold
 - MTI Scoring
 - Portfolio Optimization
 - Leveraging the expertise of each CalMTA team member
 - Conducting research and data gathering to develop the MTI scoring
 - ii. Scoring process graphic

- iii. Archived MTI ideas, describing what happens when an MTI is not selected

IV. Outreach & Responses

- a. Key RFI dates/milestones
- b. Outreach conducted to promote CalMTA and RFI
- c. Issues raised or inquiries received from public and potential submitters

V. Scoring, Prioritization, and Recommendations

- a. Summary of MTI ideas received including:
 - i. Technology versus service
 - ii. Market sector
 - iii. End use
 - iv. Other notable characteristics
 - v. Table of MTI ideas received
- b. Discussion of scoring by category, highlighting key findings
 - i. Appendix with a table of reviewer scores
- c. Portfolio optimization
 - i. Portfolio optimization factors
 - ii. Resulting changes to rankings
- d. Recommendations for MTI ideas to advance to Phase 2

VI. Appendices

- a. MTI scoring table