



Agenda Item 6(c)

Draft Market Transformation Initiative Plan Outline

I. Executive Summary

- a. Alignment with CalMTA strategic and portfolio goals

II. Theory of Market Transformation:

- a. Product/Practice/Market description and opportunity
- b. Defined target market
- c. DEI approach
- d. Market barriers - identify, highest priority barriers
- e. Market and initiative leverage points
- f. Market progress indicators
- g. Initiative budget and return on investment
- h. Market change and end state (how we expect diffusion to occur and exit strategy)

III. Product/service Assessment:

- a. Product/service definition
 - i. Identify opportunity
 - ii. Identify support for ESJ communities
- b. Competitive product/service analysis (strength, weakness, place in market, risks)
- c. Energy savings potential
- d. Summary of relevant performance and/or behavior

IV. Market Research and Characterization

- a. Current market state and why it is ripe for disruption
- b. Supply chain map (including existing EE program players)
- c. Market barriers, leverage points, intervention strategies and assumed outcomes by barrier
- d. Market baseline & assumptions
- e. Customer assessment/experience (end-customer, supply chain)
- f. Identified market risks

V. Data Management Approach

- a. Identify interim market progress indicators and milestones that will be used to assess progress, and a data collection plan to support their measurement
- b. Data management plan identifying planned/captured data source, frequency of collection, data risk and mitigation approach by market progress indicator

VI. Initiative Return on Investment

- a. Initiative budget
- b. Non-energy benefits
- c. TSB and Cost-Effectiveness calculations/forecasts and assumptions
- d. Diversity Equity and Inclusion Approach
 - i. Identify areas where there is opportunity to increase co-creation in the ESJ communities
- e. Workforce Development
 - i. Opportunity and expected outcomes for equitable workforce development; specifically, in ESJ communities

VII. Stakeholder Engagement and Reporting

- a. Stakeholder map
 - i. Working Group approach and members
 - ii. Program coordination approach
- b. Initiative coordination approach
- c. MTAB/Initiative committee feedback & team response
- d. Reporting schedule

VIII. Evaluation Plan

- a. Savings forecast and approach
- b. Approach to monitor and update baseline and savings forecast
- c. Evaluation and research plan

IX. Appendices

- a. Logic Model
- b. Operations/payment overview
- c. Market Characterization
- d. MPER response
- e. Relevant performance and behavior research
- f. Data Management Plan

X. Initiative Risk & Mitigation

- a. Risk management chart identifying, risk, likeliness of occurring, how you will know the risk is happening, mitigation approach, owner and cadence of review