



May 11, 2023

MEMORANDUM

TO: MT Advisory Board (MTAB)
FROM: Jeff Mitchell, Resource Innovations, Jennifer Barnes, 2050 Partners
SUBJECT: MTI Scoring Exercise

Overview

Please complete this pre-work assignment in advance of the May 26, 2023 MTAB meeting. The CalMTA staff developed this exercise to demonstrate the stage 1 scoring process for MT ideas received through the Request for Ideas (RFI). During the MTAB meeting, you will discuss and debate your scores with your fellow MTAB members and align on a single stage 1 score for the idea.

The materials consist of a set of completed intake questions for high performance windows and a blank stage 1 scoring worksheet. The intake form was completed by a staff member with some background in the high performance windows market, but who was not involved in the development of the intake questions or scoring criteria. These materials should represent content similar to what we will receive from market actors as part of our RFI.

Exercise

- Please review the intake questions then use the information to complete the scoring worksheet.
- Document any assumptions you make in the notes field -- such as the target market sector and/or subsector upon which you are basing your scores.
- Think beyond the information provided in the intake questions and assign scores based on opportunities and potential, utilizing your own experience as appropriate.
 - This is especially important for the equity scoring criteria where the submitters may not be focusing on the MTI's potential benefits for ESJ communities.
- Bring your final scoring worksheet and notes to the May 26th MTAB Meeting.

During the MTAB meeting, we will conduct an exercise to calibrate the MTAB scores and discuss the overall experience with the intake and scoring materials.