



Draft MTAB Meeting Notes – Organizational Review Webinar

June 18, 2026

Virtual Meeting

Welcome & Agenda

Lynette Curthoys opened the meeting with a review of the meeting agenda. She then asked MTAB members for comments regarding draft notes from the previous meeting (5/6). There were none.

CalMTA Organizational Review Report

Lauren Gage, Michelle Pham, and Joe Van Clock presented key findings from the Organizational Review conducted to assess CalMTA's first three years of operation and identify opportunities to strengthen communication, administration, market transformation initiative management, and overall organizational effectiveness. Topics discussed included study background and methodology; findings related to CalMTA reporting and communication, MTAB operations, equity approach, MTI development processes, and administrative and financial milestones; and recommendations based on these findings.

MTAB comments and questions included the following:

- Is feedback that MTAB meetings should have more time for discussion and be less presentation-heavy largely the same as feedback about the value of in-person vs. remote meetings?
 - Joe clarified that these are two separate issues: MTAB meetings tend to be presentation-heavy whether virtual or remote, and members want more time to discuss and engage earlier in MTI development.
- Regarding findings on CalMTA's stakeholder engagement progress, the stakeholder landscape in California is very complex. How does CalMTA practically structure its process to address this complexity without draining all resources?
 - Joe acknowledged that this is challenging, and that Apex struggled to address the need for transparency and early feedback while allocating resources to show up in a polished, professional way. Adding more feedback points throughout the process is one recommendation.
 - Lauren added that having early conversations with MTAB around key decision-points is different than engaging a broader set of external stakeholders, because MTAB is better positioned to give in-progress feedback.
- Often, by the time MTAB is asked to review CalMTA deliverables, the volume is overwhelming (MTI Plans are long and complex) and the review can feel rushed and stressful. A more piecemeal approach might enable more thoughtful feedback.
- In terms of the overall study, was there any area that Apex would have wanted to dig into more deeply that might have been interesting or fruitful?

- Joe replied that, in general, Apex would have liked to talk to more people to determine whether some comments represented isolated experiences or broader issues.
- Lauren noted that the timeline and structure didn't allow the team to dig into process-related opportunities for improvement. While they were able to get a "pulse check" on these topics, they were unable to develop more specific recommendations.

Next Steps on Recommendations

Lynette presented the planned or in-progress actions taken by CalMTA to respond to key feedback from the organizational review, specifically efforts to (1) refine MTAB meeting structure and strategic engagement, (2) expand ESJ community engagement, (3) strengthen internal processes, and (4) increase stakeholder input.

MTAB feedback included the following:

- It might be useful to structure MTAB meetings in a way that allows MTAB members to opt in or out based on the topics most relevant to or aligned with their experience and insight.
- CalMTA could provide MTAB members with prompts or key questions as a lens for reviewing specific documents. This process would clarify that the documents are works-in-progress and help focus review.
- It would be helpful for CalMTA to identify the specific items in a document that MTAB members should provide feedback on as a starting point for review.
- The Idea to Initiative framework seems to provide a launching pad for some of these refinements, enabling granular details to be addressed via other channels so that MTAB gatherings can focus on strategic elements with structured prompts.
- Overall, the organizational review report is incredibly positive: CalMTA is meeting objectives, and there are no major sources of concern. CalMTA can build on what it has successfully established and focus on refinements and enhancements, such as using MTAB in a more focused way.
- With regard to increasing stakeholder input, the robust California landscape means that CalMTA could spend all its available time and budget meeting with external stakeholders, which is not feasible. Expansion of efforts should be done pragmatically, with a focus on engagement around decision-points before MTIs are fully baked.
- Is the recommendation regarding internal processes exclusively focused on MTI development? There are other decision-points relevant to CalMTA processes or structures.

Lynette noted that feedback from the report seemed to focus on MTI development, but market deployment will also be a key part of this once the first MTIs move into that stage.

Public Comment

No public comments were received.

Next Meeting & Next Steps

Lynette shared CalMTA's plan for the remaining meetings in 2026.

The meeting was adjourned.

Attendees

MTAB Members

Mary Anderson, Pacific Gas & Electric
Cyane Dandridge, SEI
Hayley Goodson, TURN
Jennifer Green, MCE
Jeff Harris, Northwest Energy Efficiency Alliance
Peter Miller, Natural Resources Defense Council
Christie Torok, California Public Utilities Commission

Participating Staff & Consultants

Lynette Curthoys, CalMTA/Resource Innovations
Joe Van Clock, Apex Analytics
Michelle Pham, Apex Analytics
Lauren Gage, Apex Analytics

Guests

Ammi Amarnath, EPRI	Melissa Jones, SDG&E
Don Arambula, DAC	Melissa Kosla, Acadis Consulting
Amy Buege, Verdant Associates	Joaquin Narvaez, West Coast Green
Kevin Clark, Bradford White	Builders LLC
Anders Danryd, SoCalGas	Derek Okada, Energy Solutions
Kim DiCello, CLEAResult	Emily Pelstring, CPUC
Andrew Dionne, BrightLine Group	Tami Rasmussen, Evergreen Economics
Mihoyo Fuji, California Air Resources Board	Sepideh Rezaei, Unrooz Solutions
Emily Gomez, Ecology Action	Rocco Sucato, Energy Solutions
Michael Greco, Energy Solutions	Marty Turock, Cleantech San Diego
Joshua Hebert, Hydronic Specialty	Ferit Ucar, NMR Group
Company	Thomas Yeh, Connected Buildings LLC
Lore James, Ecology Action	