



2nd QUARTER 2023

Report

CaIMTA is a program of the California Public Utilities Commission (CPUC)
and is administered by Resource Innovations
calmta.org

Overview

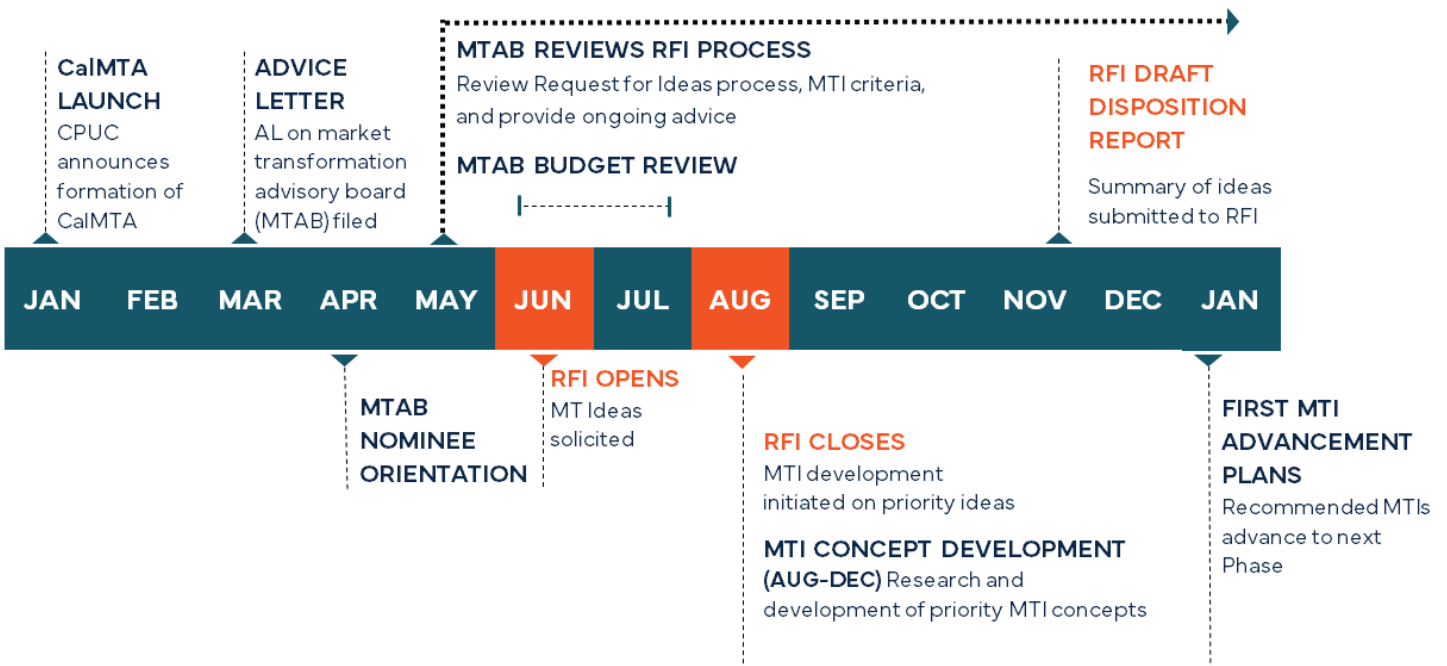
Since launching in late 2022, CalMTA has been working to advance energy efficiency through the development of market transformation initiatives that also helps achieve state goals for decarbonization, workforce development, and equity. CalMTA is a program of the California Public Utilities Commission (CPUC) and is administered by Resource Innovations. This 2nd quarter report summarizes the work and accomplishments of CalMTA in creating a foundation for success.

Key 2nd quarter accomplishments include:

- Launch of our Request for Ideas (RFI), that allows people to submit their best ideas for potential development as Market Transformation Initiatives (MTIs).
- Creation of a robust infrastructure of systems and human resources to process ideas and start the MTI development process.
- Identification of key stakeholders and establishment of communications channels and collaborative relationships.

The following sections provide detail of efforts during this period, including tables showing the activities completed during 2nd quarter, and those still to come through the end of 2023.

CalMTA First-Year Timeline





Foundational activities

Business operations

CalMTA has continued to create and implement business processes that align with best practices. We've worked to ensure that our policies and procedures are understood and carried out by staff and partnering firms, including onboarding new hires and training staff on the conflict of interest (COI) policy, planning and executing Market Transformation Advisory Board (MTAB) meetings, conducting finance and operational reporting, and improving our internal processes and procedures so that our team can work efficiently.

KEY 2nd QUARTER ACTIVITIES:

- The CalMTA Business Operations team kicked off the 2024 budgeting process and is expected to file an Annual Budget Advice Letter in 3rd quarter. This was developed in close collaboration with the MTAB.
 - Critical business operations infrastructure for finance & IT, initial staffing, and legal and contracting, have all largely been completed.
- Most crucially, an [Ideas Portal](#) to receive MTI submissions was created, tested, and launched, with a robust back-end infrastructure for evaluating ideas that are submitted.
- We established and enacted systems to ensure compliance with COI policy, including mitigation plans to enforce the firewall and training for Resource Innovations employees and partnering firms on COI policies and requirements. CalMTA also developed a formal process for seeking CPUC review on COI-related matters and used this process on several occasions.
 - We've recruited a highly skilled, diverse, and growing team, with three new staff members starting in 2nd quarter. CalMTA has developed a thorough new-employee onboarding process that includes trainings on safety, anti-harassment and anti-discrimination policies, internal processes and procedures, and applications used to conduct daily operations.

- In this start-up period, establishing consistent processes has been a priority and we have added more resources and trainings to support staff development, internal communications, and effective execution of projects toward our shared goals. On the data systems/IT side, we leveraged shared Resource Innovations resources to meet short-term systems development needs, and hired a Salesforce Specialist late in the 2nd quarter to help meet our ongoing needs.
- The inaugural Market Transformation Advisory Board, which was recruited through an open application process in 1st quarter, was recommended and seated in 2nd quarter.
- This nine-member panel of industry experts, who helps guide CalMTA’s work, was approved by the CPUC via a Tier 2 Advice Letter. The MTAB met officially for the first time in May and again twice in June at open meetings that provide transparency with time for public comment. For these publicly accessible events, all documentation and materials are posted on the [CalMTA.org](https://www.calmta.org) website.

<p>The tables below refer to activities presented in the CalMTA 2023 Annual Operations Plan, and show activities completed in 2nd quarter, ongoing efforts, or activities still to be completed. For activities completed in 1st quarter, please see the 2023 Annual Operations Plan.</p>	KEY	
	Completed	●
	Ongoing	◐
	To be completed	○

BUSINESS OPERATIONS ACTIVITIES STATUS	Q2	Q3	Q4
Develop an MTI development and management platform including documentation of process and reporting requirements	●	○	
Create 2024 budget and file with CPUC in an advice letter (ABAL)	◐	○	
Develop Draft Solicitation Protocols that will ensure fair and competitive RFP processes			○
Develop job descriptions for each role and work with Resource Innovations talent acquisition team to fill positions as scheduled and meeting diversity goals	●	◐	○
Ensure new staff receive IT safety and workplace harassment training	●	◐	○
Hold public MTAB meetings in-person and virtually through 2023 to develop a set of MTI concepts for advancement	●	◐	○
Share notices of the MTAB meeting schedule including agenda and packet materials on calmta.org and via email announcements	●	◐	○



Stakeholder engagement & communications

CalMTA continued to develop robust systems and processes for both collaboration and transparency in 2nd quarter. Our strategy takes a tiered approach to meet people where they are, demonstrating value through targeted events, thought leadership and innovation, and inviting others to collaborate.

KEY 2nd QUARTER ACTIVITIES:

- In 2nd quarter, we began connecting with key stakeholders across the state who could be impacted by our work, including IOU energy efficiency directors and individuals working in codes & standards, emerging technologies teams, market actors, community-based organizations, and other prospective CalMTA advocates and allies. Our stakeholder outreach includes both digital and direct connections.
- We launched our brand, including a new logo and website at calmta.org, and the development of collateral materials and templates for our regular notices and updates. We also finalized a [2023 Operations Plan](#) to chart activities for 2023.
- We focused on building early allies by connecting with contacts in the efficiency industry, manufacturing, research and academia, and others to introduce CalMTA and inviting them to submit to and share with their networks our Request for Ideas campaign, which launched



in June (see MTI development section for details). To support promotion of the RFI, we developed resources for allies and other stakeholders to share.

- CalMTA offered online briefing webinars including a [Theory of Market Transformation webinar](#) as well as an [RFI Briefing](#) to introduce key concepts to audiences and bring ideas into the RFI. We also developed methods for reaching beyond our existing audiences, giving new audiences a pathway to engage and stay informed by building out our social media presence and growing our email list, where all of our meetings and webinars are announced.



- We further established our presence in the state through participation in industry events such as national and statewide energy efficiency, electrification, and climate conferences.
- Led by CalMTA partnering firms The Ortiz Group and Unrooz, we've identified priority outreach targets representing environmental and social justice communities (ESJ) and developed explanatory materials. Briefings kicked off with equity-focused organizations to introduce CalMTA and solicit input on upcoming MTIs.

STAKEHOLDER ENGAGEMENT ACTIVITIES STATUS	Q2	Q3	Q4
Create a logo and brand identity for CalMTA that is unique and recognizable and develop key collateral assets	●		
Develop an accessible website that provides information about CalMTA's goals and MTI development	●		
Create and share an annual operations plan to provide progress updates	●		
Create and send regular email or newsletter updates to share progress on CalMTA activities with stakeholders	●	◐	○
Publicize public MTAB meetings and create opportunities for public comment either during the meetings and afterward	●	◐	○
Conduct personal meetings with key stakeholders including program implementers and administrators to share information and collaborate	●	◐	○
Launch and execute a campaign promoting CalMTA's Request for Ideas that allows audiences to submit ideas for realizing market transformation	●	○	
Tap efficiency industry companies and organizations to help share information about the RFI and other CalMTA efforts	●	◐	○
Gather input on the prioritized Request for Ideas from targeted audience segments, such as ESJ communities	●	◐	○
Release a Q2 report on CalMTA activities to date and quarterly thereafter		◐	○

MTI Development

In 2nd quarter, CalMTA started to gather a broad set of technology, practice and service ideas for MTI development. Strategies to identify and solicit ideas are being pursued through market scans of technologies, direct invitations to submit, as well as more broad-based promotions. We developed and launched the [Ideas Portal](#) on June 15 where applicants can submit their ideas through August 18.

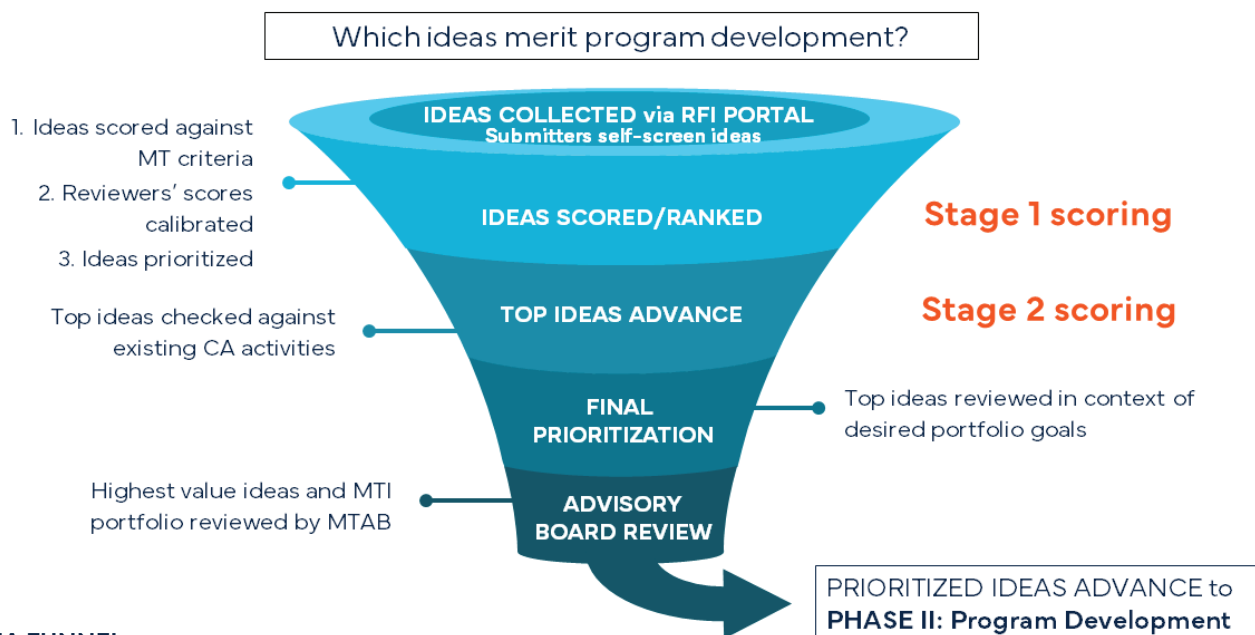
KEY 2nd QUARTER ACTIVITIES:

- The MTI development process is now underway. Incorporating MTAB feedback, the MTI development team has refined scoring and portfolio

criteria, and developed tools and templates for reviewing and evaluating submissions, including equity metrics.

- In June, we launched the Request for Ideas campaign and the [Ideas Portal](#), to receive market transformation energy efficiency ideas for the very first time. The RFI is the first step to allow us to identify and administer a portfolio of MTIs that offer the best opportunity to advance California’s energy efficiency and climate goals. The RFI process includes multiple avenues for applicants to receive support with their submissions including a how-to video, office hours with CalMTA representatives, and a Q&A platform.

The CalMTA MTI Development Process Phase I: Concept Development



THE IDEA FUNNEL

The funnel represents scoring and prioritizing ideas during Phase I. After collection via the Ideas Portal, ideas are vetted and scored until only the best set are prioritized and recommended for Program Development.



- The team built a platform in Salesforce to catalog, manage and score the MTI ideas. Using a two-stage process, a cross-functional team of product managers, MT design experts, equity experts, and market research and evaluation team members will vet, debate, and [score each MTI idea](#).
- We established dedicated sections of the scoring criteria to evaluate each MTI’s potential benefits to ESJ communities including reductions in energy burden, job creation, and reduced localized greenhouse gas (GHG) emissions.

MTI DEVELOPMENT ACTIVITIES STATUS	Q2	Q3	Q4
Work with MTAB in public forums to create MTI criteria and scoring for the evaluation of ideas	●	○	
Create an intake form with instructions and key questions for submitters to share their ideas	●		
Launch an open Request for Ideas, kicking off in June and running for two months, to gather MTI ideas	●	○	
Use the MTI Development and Management Platform to catalog, manage and score RFI submissions	●	◐	○
Develop an approach to ensure positive impacts to ESJ communities	●		
Coordinate with the MTAB to review submissions and prioritize MTI ideas for further development		○	○
Work with MTAB to develop overarching goals for the MT portfolio		○	
Develop COI policies for MTI Working Groups, and establish these groups for specific markets identified in the MTI Advancement Plans			○
Summarize the outcomes of all ideas submitted and deliver to the CPUC and MTAB as an RFI Disposition Report			○
Develop draft MTI Advancement Plans for those ideas that will move to Phase II: Program Development			○

Looking ahead



The 3rd quarter of 2023 will see the closing of the RFI, although it will re-open in January 2024 and be scored quarterly thereafter.

CalMTA will develop energy savings estimates, GHG reduction impacts, costs, and adoption forecasts, and will score this first round of ideas. The highest-ranked of these market transformation opportunities will be reviewed against other California activities and policies for conflicts or leverage opportunities, and we will develop Advancement Plans for priority MTI opportunities. In 2024, we will inaugurate Phase 2 of the MTI development process, Program Development, for the first MTIs. Additional work will continue for ideas still in process in 2024.

The MTAB will be involved throughout, and as always, we will provide opportunities for public comment and dialogue to inform our efforts and the Californians who stand to benefit from this work.

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RESOURCES

- [MTAB Meetings](#)
- [Webinars](#)
- [2023 Annual Operations Plan](#)
- [MTI Development Process video](#)



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