



ACTIVITY REPORT

3rd Quarter 2024

CalMTA made substantial progress on several operational and market transformation initiative (MTI) development milestones in the 3rd quarter of 2024, driving us closer to MTI implementation and achieving California's goals for cost-effective energy efficiency, decarbonization, workforce development, and equity.

For previous Quarterly Reports, visit [Resources and Reports](#)

For the 2024 CalMTA Operations Plan, visit: [2024 Operations Plan](#)



SECTION 01

Introduction

Stacey Hobart
Principal of Engagement &
Communications

3rd quarter key outcomes



Forming initiatives

MTI Plans and the CPUC Application were in development for Room Heat Pumps and Induction Cooking.

Public comment

As part of its commitment to transparency, CalMTA solicited and received public comment on the Advancement Plans for Commercial Replacement & Attachment Window Solutions, Residential Heat Pump Water Heating, and Foodservice Water Heating Systems. These comments were reviewed and posted with comment response memos.

Strategy Pilots underway

Strategy pilots under way this quarter included self-installations of Room Heat Pumps, ENERGY STAR Retail Products Platform (ESRPP) zip code targeting to determine opportunities to better reach environmental and social justice (ESJ) communities, and Induction Cooking Chefluencer events.

3rd quarter key outcomes



Preparations for Commercial Rooftop Units field study

CalMTA engaged with two CalNEXT project leads to recruit sites and initiate a field study of heat pump RTUs in several California climate zones.

New Request for Ideas (RFI)

After closing the RFI portal, new ideas went through Stage 1 scoring and were presented to the Market Transformation Advisory Board (MTAB) with four prioritized for Stage 2 scoring.

3rd quarter key outcomes



Accessing expert guidance



Evaluation Advisory Group

Completed recruitment and seated CalMTA's newly formed Evaluation Advisory Group.



Equity Sounding Board

Prepared recruitment and application processes for CalMTA's Equity Sounding Board.



SECTION 02

MTI Development

Jeff Mitchell

Principal of Market Transformation

MTI Development activities summary



○	◐	●
To be started	In process	Completed

3 rd Quarter Activity	Q1	Q2	Q3	Q4
Release two draft Advancement Plans and solicit public comment for: <ul style="list-style-type: none"> • Foodservice Water Heating Systems • Efficient Streetlighting* 			●	
Finalize four Advancement Plans for approval and kick off Phase II activities*			●	
Finalize and launch new Strategy Pilots with public comments and webinar			○	
Complete Stage 1 scoring on the 2024 RFI submissions and 2023 RFI submissions that were flagged for additional research/refinement			●	

**The Efficient Streetlighting Advancement Plan was finalized but the idea did not advance to Phase II.*

CalMTA MTI Development Process



Ideas in process



Room Heat Pumps



Induction Cooking



Commercial Rooftop Units



Foodservice Water Heating Systems



Commercial Replacement & Attachment Window Solutions



Residential Heat Pump Water Heating

Efficient Streetlighting idea paused



- In July 2024, CalMTA paused the Efficient Streetlighting idea in Phase I of development.
- We will revisit this idea as part of the Batch 3 MTI scoring process before moving forward.

Forming initiatives



Room Heat Pumps



Induction Cooking

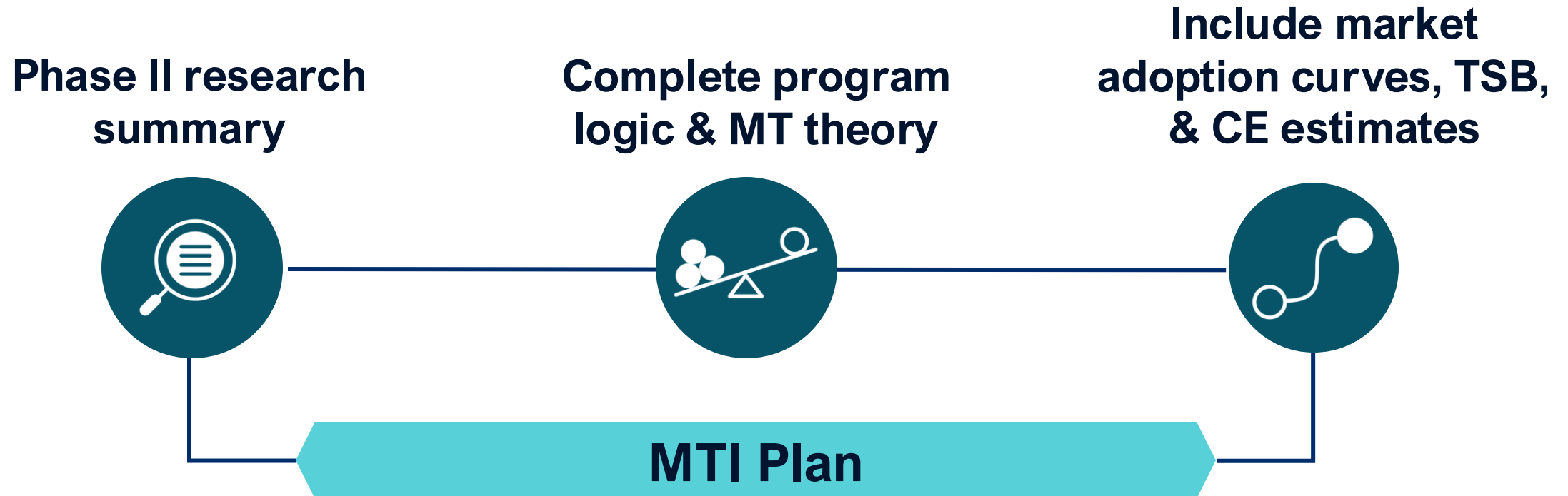


These two MTIs have progressed through Phases I and II. MTI Plans and the CPUC Application were being prepared during the 3rd quarter and will be finalized by the end of the year. Phase III will begin upon CPUC approval of the Application in 2025.

MTI Plans



The MTI Plans describe the business case supporting the MTI and the market development and evaluation activities that will be implemented during Phase III: Market Deployment.



MTI Plan Appendices



A: Logic Model Packet

B: Market Forecasting & CE Modeling Approach

C: Product Assessment Report

D: Market Characterization Report

E: External Program Alignment & Coordination

F: Evaluation Plan

G: Risk Mitigation Plan

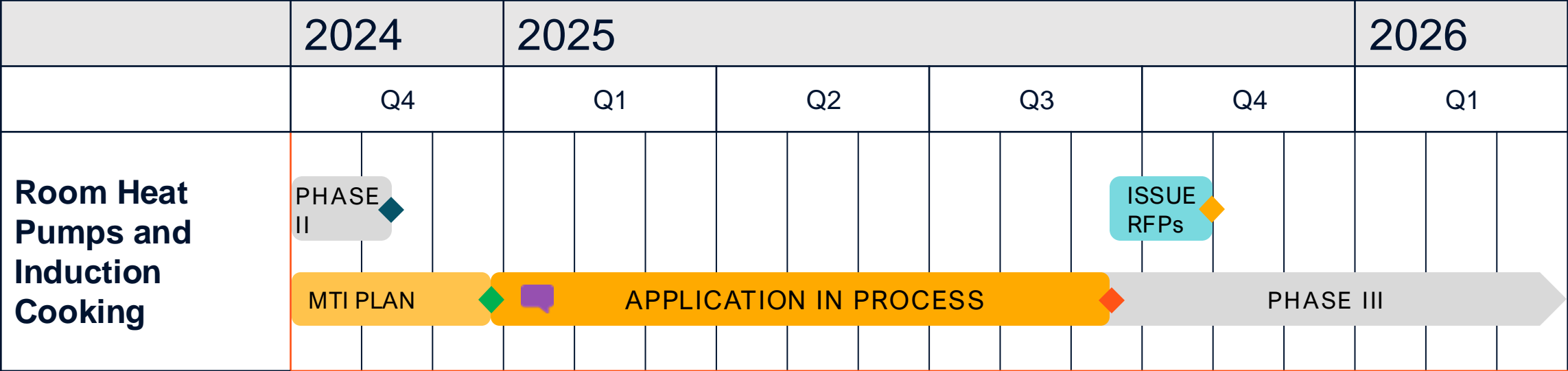
H: Phase III Cost Estimate






I: MTAB Feedback

Market
Transformation
Initiative Plan

The diagram consists of a large teal circle on the right side of the slide. Inside the circle, the text "Market Transformation Initiative Plan" is centered and written in a white, sans-serif font. The circle is positioned to the right of a stack of nine horizontal bars, each representing an appendix, which are all pointing towards the circle.

CPUC Application timeline



-  Public Comment Period
-  Application & MTI Plans Approved
-  Market Characterization Study
-  File Application & MTI Plans
-  Implementation Contracts in place

Idea to Initiative campaign



CalMTA launched *Idea to Initiative*, an educational campaign to:

- 1) Preview and discuss key portions of both the Induction Cooking and Room Heat Pump MTI plans.
- 2) Grow understanding of the critical aspects of the MTI plans before the draft release in mid-November.

Resources from the full campaign available here: <https://calmta.org/idea-to-initiative/>.

Section 2.1 Forming Initiatives

Elaine Miller, Senior Strategy
Manager



Room Heat Pumps

During the 3rd quarter CalMTA completed important work on the following Room Heat Pumps MTI appendices:

- [Appendix A: Logic Model](#)
- [Appendix C: Product Assessment Report](#)
- [Appendix D: Market Characterization Report](#)

The key findings of these reports and the outline of the logic model were included in ***Idea to Initiative*** Part 1: Market Transformation Theory and Logic Models, [presented to the MTAB on Sept. 19.](#)



Room Heat Pumps MTI



- Target market: existing multifamily and small-scale single-family residences (including tenants)
- Units can be installed without a contractor, lowering the cost of adoption
- 120V products eliminate panel capacity concerns

Why this? Why now for California?

- Fills a critical heat pump product gap to help CA reach 6M HP Challenge
 - 120V capability and electrical infrastructure challenges, especially for MF
 - Affordable HP option for MF & small residential, ESJ communities
- Leverages and builds upon new market entrants & national momentum
- Future product will provide additional benefits
 - Air filtration capability improving indoor air quality
 - Use of lower GWP refrigerants
- **Clear role, timing, and MT Theory for CalMTA**

More Room Heat Pumps resources



For more information on the insights and studies comprising the MTI appendices, find the Room Heat Pumps *Idea to Initiative* campaign resources here:

<https://calmta.org/idea-to-initiative-room-heat-pumps/>



Induction Cooking

During the 3rd quarter CalMTA completed important work on these Induction Cooking MTI Appendices:

- [Appendix A: Logic Model](#)
- [Appendix C: Product Assessment Report](#)
- [Appendix D: Market Characterization Report](#)

The key findings of these reports and the outline of the logic model were included in *Idea to Initiative* Part 1: Market Transformation Theory & Logic Models, [presented to the MTAB on Sept. 19.](#)



Induction Cooking MTI



- Target market: existing single-family and multifamily residences, residential new construction
- Induction = the quality cooking experience needed to facilitate CA's transition to full decarbonization
- Significant opportunities for consumer education and awareness-building
- 120V induction products with batteries reduce concerns about panel capacity and grid reliability

Why this? Why now for California?

- Last end-use electrification focus to disconnect from gas grid
- Leverages and builds upon new market entrants and national momentum
- Fills a product gap and builds availability so multifamily, ESJ not left behind
- Builds market for battery-equipped 120V products allowing charging & use during off peak; mitigates challenge in moving from gas to electric
- Growing momentum on health benefits which CalMTA can amplify
- Move the market beyond high-end niche, to mass adoption
- **Clear role, timing, and MT Theory for CalMTA**

More Induction Cooking resources



For more information on the insights and studies comprising the MTI appendices, find our Induction Cooking *Idea to Initiative* campaign resources here:

<https://calmta.org/idea-to-initiative-induction-cooking/>



Strategy Pilot Update: Chefluencer



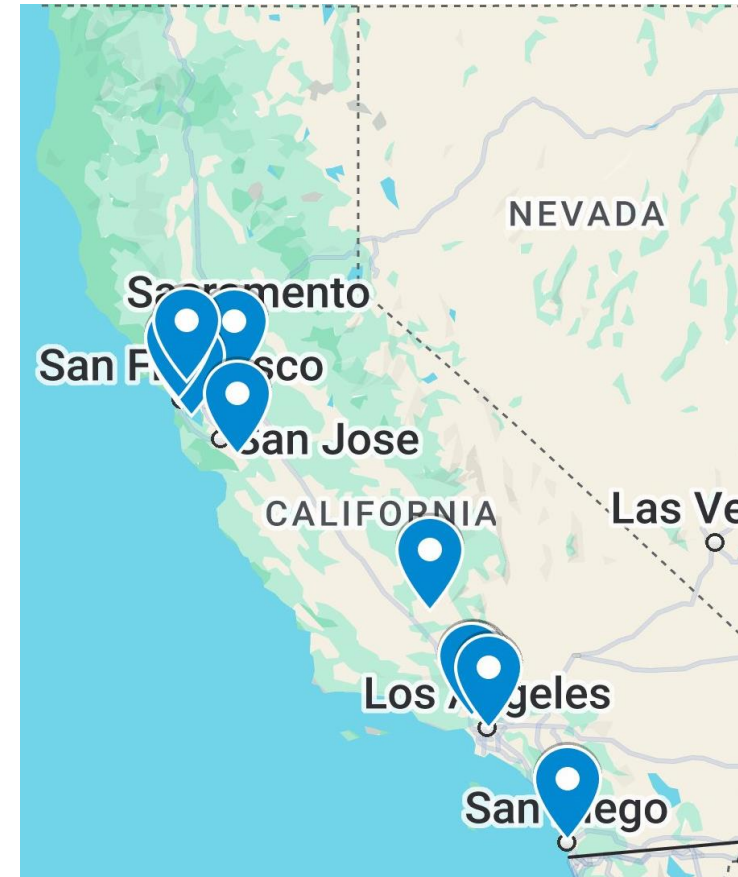
- This pilot built upon the Building Decarbonization Coalition’s successful [“Chefluencer” program](#), which uses experienced chefs to lead engaging, multilingual, culturally relevant cooking demonstrations using induction stovetops at live events.
- Tested interventions and messaging that could be used to change public opinion and build awareness on the benefits of induction cooking.
- A post-event survey gauged participant opinions on induction cooking, their likelihood of purchasing an induction appliance, and the effectiveness of messaging approaches.

Strategy Pilot Update: Chefluencer



Key 3rd quarter activities:

- Contracted with the [Building Decarbonization Coalition](#) to host a series of 12 Chefluencer events throughout California between August - October 2024.
- Distributed a post-event survey to event attendees. In total, 270 surveys were completed.



Strategy Pilot Update:

Room Heat Pump Self-Installation Practices



This pilot sought to gain insight into two assumed benefits of RHP technology:

- (1) Its purported self-installation potential
- (2) The relative portability of these products

CalMTA provided implementation partners with RHP units at no cost for distribution and installation. Partners USGBC-CA, El Concilio, and Redwood Energy recruited ESJ and affordable housing participants to self-install the units and share feedback on their experience via surveys distributed at key intervals after product installation.

Strategy Pilot Update:

Room Heat Pump Self-Installation Practices



Key 3rd quarter activities completed:

- 150+ saddlebag, portable, and traditional window HPs procured from Gradient, Whynter, and Midea.
- 131 HPs installed as of Oct. 11, 2024.
- 112 participant surveys completed directly after installation; 82 user experience surveys completed 30+ days after installation.



Strategy Pilot Update: Geographic Targeting Using ESRPP



- This pilot sought to determine whether the ENERGY STAR Retail Products Platform (ESRPP) serves as a viable intervention strategy for targeting ESJ communities once the MTIs are ready for market deployment.
- CalMTA aimed to leverage ESRPP's existing functionalities in CA to gather statewide data and test the feasibility of motivating retailers to focus on and stock lower priced products in designated ESJ-dominant zip codes through tailored incentives.

Strategy Pilot Update: Geographic Targeting Using ESRPP



Key activities completed:

- Participation agreements secured with The Home Depot, Best Buy, Lowe's, and Nationwide.
- Sales data provided by some retailers for AC products and cooktops/ranges; retailers to provide historical data by Q4.

	The Home Depot	Best Buy	Lowe's	Nationwide
Stores in ESJ community zip code	88	33	32	36
Stores in non-ESJ community zip code	132	104	75	167

Strategy Pilot Updates: Next steps



Section 2.2 Market Transformation Ideas entering Phase II

Nick Fiore, Program Manager



Commercial Rooftop Units (RTUs)



- During the 3rd quarter CalMTA made significant progress on its MTI Plan tasks for Commercial RTUs.
- The following slides detail our updated MTI Plan timeline and 3rd quarter 2024 accomplishments.
- Name change: This idea was formerly known as *Efficient Rooftop Units*.

CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations

Commercial RTUs: Market research activity



Accomplishments

- Completed a literature review to characterize RTU research objectives
- Drafted preliminary RTU Market Characterization findings
- Completed all workforce interviews and began preparing a summary of key findings

Up next

- HVAC distributor interviews, RTU decision maker surveys, and manufacturer interviews
- Finalize Market Characterization study in 2025

Updated draft product definition



Rooftop Units

- Single-zone, forced-air systems that package an evaporator, condenser coils, fans, and heating components into a single unit to serve a building's HVAC needs.

Efficient Rooftop Units

- Variable capacity heat pump and variable speed fan control provide efficient heating and cooling across outdoor and indoor conditions.
- Heat/energy recovery ventilation (HRV/ERV) reduce peak heating and cooling demand; leveraging internal sensors, advanced controls, and internet connectivity detect faults, increase grid flexibility, and optimize operation.
- Heat pump sizing methods and advanced defrost strategies reduce resistance heating reliance and allow direct replacement of mixed-fuel RTUs without electrical upgrades.

Commercial RTUs: Field study preparation



CalMTA engaged two CalNEXT project leads to recruit sites and initiate a field study of heat pump RTUs in several California climate zones.

The study will observe installation practices and system configurations, monitor RTU performance and energy use in heating & cooling seasons, and conduct occupant surveys.

CalMTA will leverage integrated sensors and Remote Monitoring Systems (RMS) to understand the performance of heat pump RTUs and will demonstrate and validate the savings potential of RMS systems as a product feature for RTUs in California.

CalMTA anticipates RTU field study launch by the end of 2024.

Commercial RTUs timeline



 Interim Field Study Report

 Final MTI Plan and Advice Letter

 Public Comment Period

MT Ideas entering Phase II: 3rd quarter highlights



**Foodservice
Water Heating
Systems**



**Commercial
Replacement &
Attachment Window
Solutions**



**Residential Heat
Pump Water
Heating**



**Finalized
advancement
plans**



Foodservice Water Heating Systems



California's foodservice industry needs a transformative approach for this sector to meet California's decarbonization goals.

This industry relies heavily on gas for heating water:

- 75% of establishments using it as their primary fuel source.
- Water heating can account for up to 20% of a restaurant's total energy use.

Learn more in the Advancement Plan: <https://calmta.org/resources-and-reports/draft-foodservice-water-heating-systems-advancement-plan/>



Commercial Replacement and Attachment Window Solutions



Commercial Replacement and Attachment Window Solutions (CRAWS) can improve building envelope thermal performance and downsize HVAC systems.

- Vacuum Insulated Glass and Commercial Secondary Windows technologies offer substantial improvements.
- Although windows on average comprise ~15% of a building's exterior surface, they are responsible for HVAC losses of ~40%, equaling ~12% of a typical building's overall energy use.

Learn more in the Advancement Plan: <https://calmta.org/resources-and-reports/commercial-replacement-attachment-window-solutions-advancement-plan/>

Residential Heat Pump Water Heating



Residential heat pump water heaters (HPWH) are 2-3x more efficient than conventional gas and electric resistance water heating options.

While HPWHs have been available for the past 15 years as energy-efficient alternatives that cut greenhouse gas (GHG) emissions and improve local air quality, they represent less than 1% of the water heaters sold in California.

Learn more in the Advancement Plan: <https://calmta.org/resources-and-reports/residential-heat-pump-water-heating-advancement-plan/>



Next steps for these three MTIs?



Commercial Replacement & Attachment Window Solutions (CRAWS)



Residential Heat Pump Water Heating



Foodservice Water Heating Systems

- Phase II will begin with market and technical literature reviews
- The CRAWS MTI team will also begin recruiting sites to initiate a field study of Commercial Secondary Windows (CSW) that is scheduled to launch by Q2 2025
- Interim research being conducted for Foodservice Water Heating Systems to refine approach and limit overall budget expenditures.

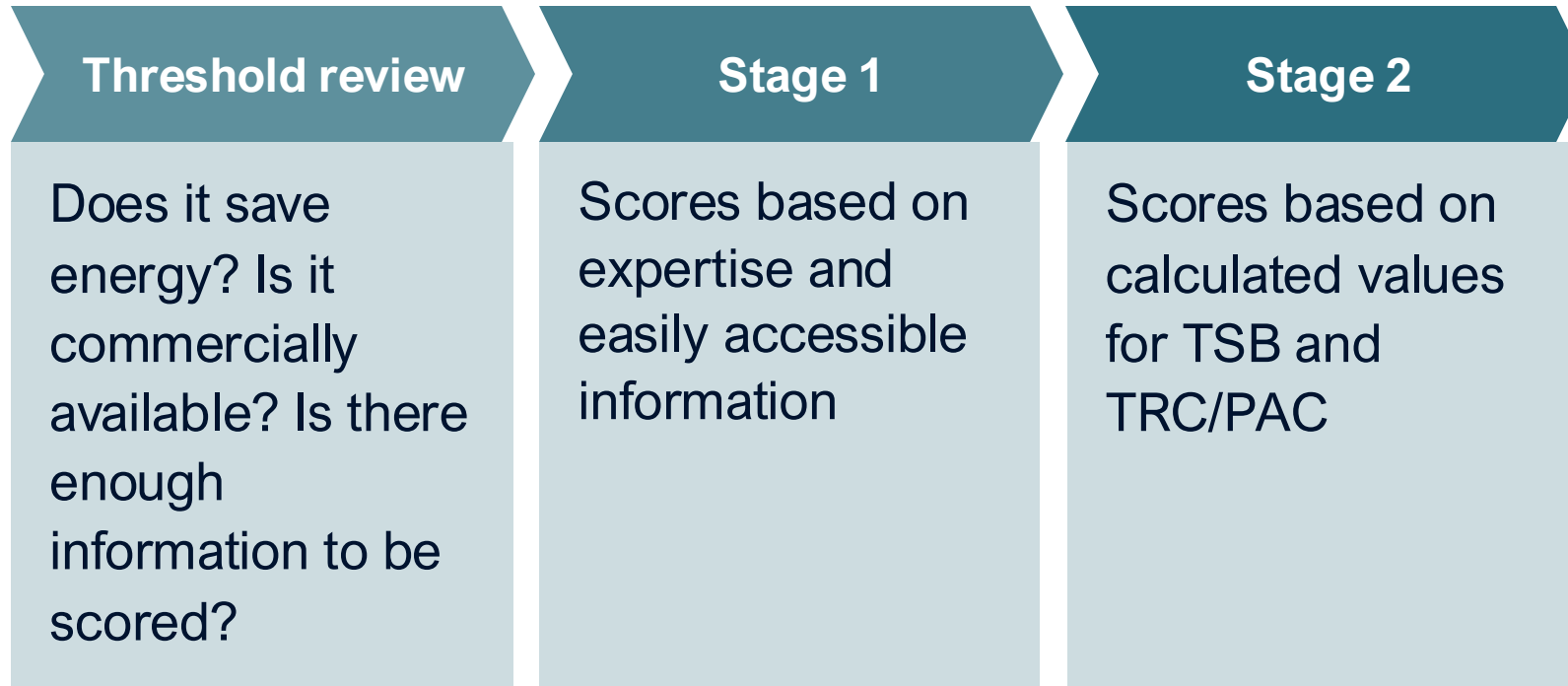
Request for Ideas



- The Request for Ideas portal was open from May 29 - July 5, 2024.
- Each idea received was scored according to this criteria.

Category	Criteria
Total System Benefit (TSB) A single metric that encompasses energy savings, grid benefits and reliability, and GHG impacts (Stage 2)	Energy TSB
	Grid Benefits TSB
	GHG Impacts TSB
Product Readiness An indicator of the supply chain maturity/product availability	Readiness
Participant Cost/Cost-effectiveness Assesses the overall estimated cost of the MTI against its benefits	Participant Cost (Stage 1)
	PAC & TRC (Stage 2)
ESJ Impacts (Equity) Assesses whether the MTI will provide beneficial impacts to ESJ communities or leverage existing community resources in its execution	Beneficial Impacts to ESJ Communities
	Partnership Opportunities with ESJ Communities
Non-energy Impact Captures the benefits or impacts (in addition to energy savings and greenhouse gas emissions reductions) that the MTI will deliver	Non-energy Impacts
MT Alignment Ensures MTI aligns with key aspects of MT theory; presents a strong MT opportunity	Innovation Characteristics
	Leverage Points
	Sustained Benefits

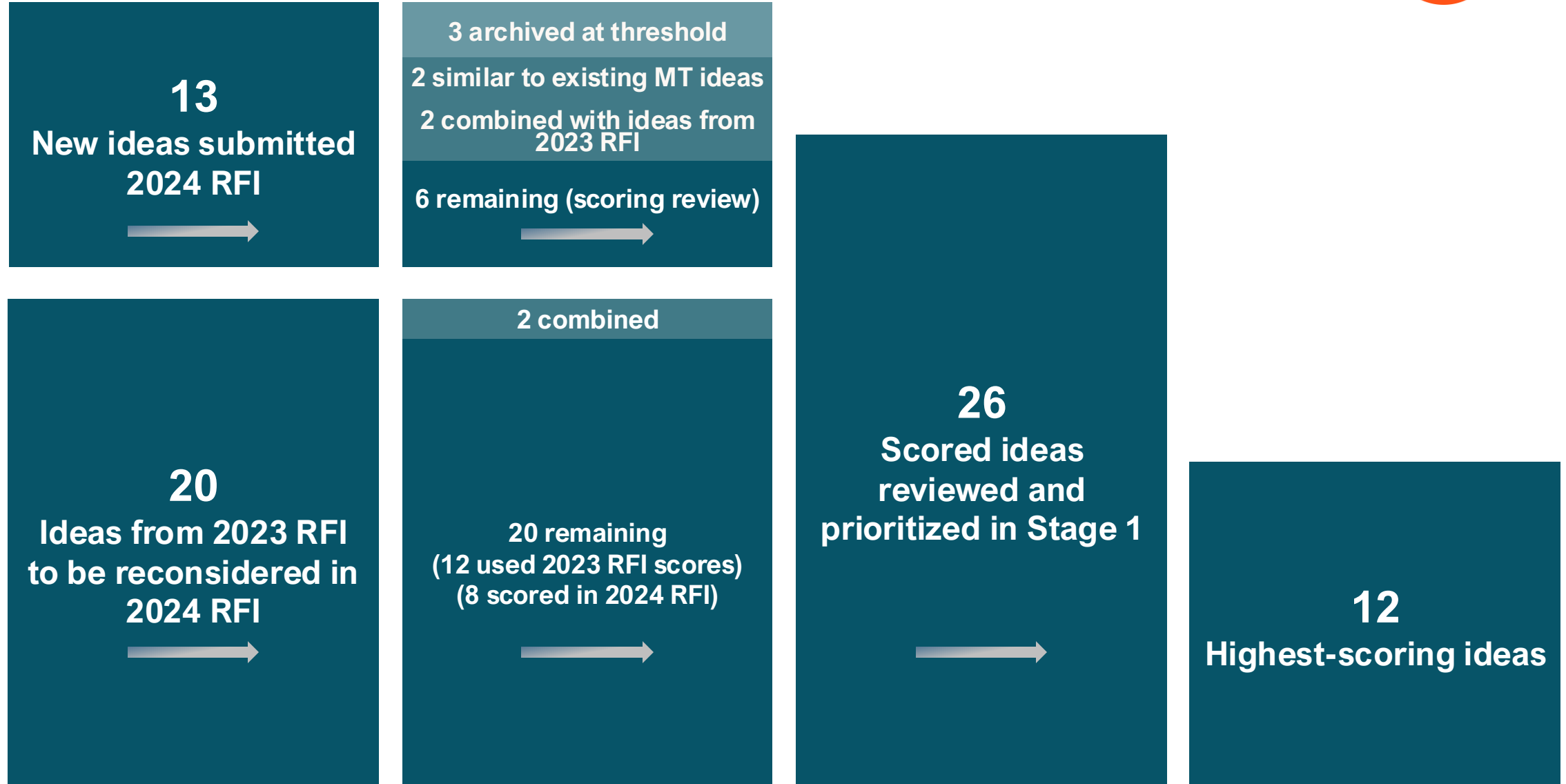
Reminder about the scoring process



The scoring process was the same as the first RFI:

- Team aligned on key parameters
- Each idea was scored individually
- The team then discussed and agreed on a single, final Stage 1 score

Disposition of new & carried forward ideas



Highest scoring ideas weighted by TSB

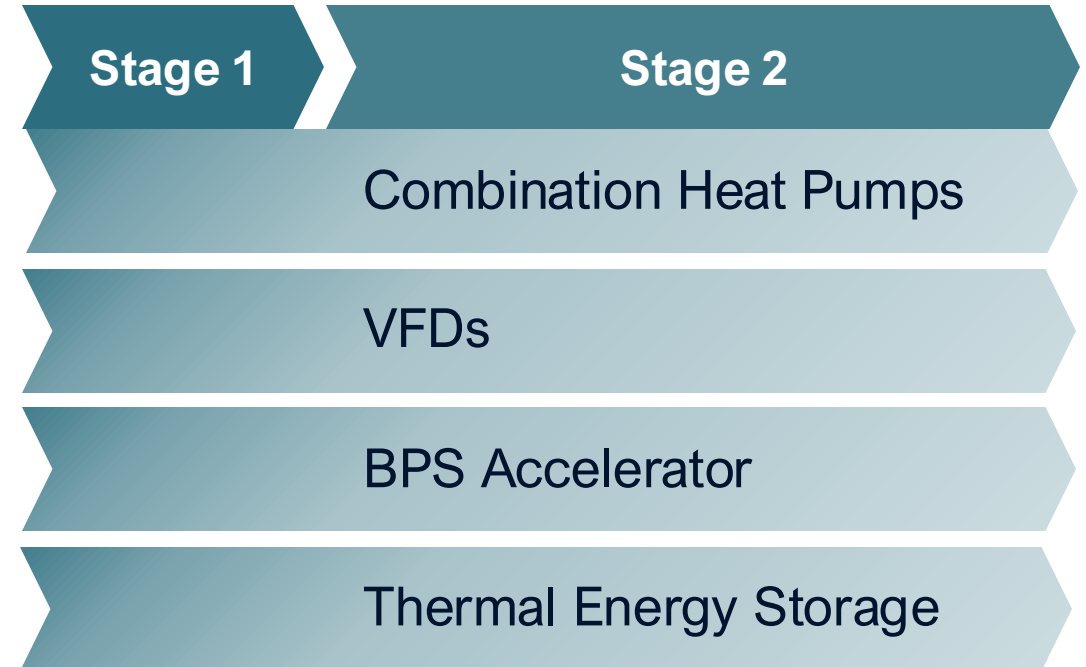


Idea Name	Weighted Score	"TSB" High	"TSB" High & MT Alignment
0085 Combination Heat Pumps	8.11	9.51	8.50
0218 Sustainable Outdoor Lighting	6.78	8.86	8.38
0118 Very High Efficiency Dedicated Outdoor Air System (DOAS)	6.51	8.56	7.00
0133 Thermal Energy Storage as a Distributed Energy Resource	6.60	8.17	6.87
0188 Reflective Insulation for Windows	7.09	7.48	6.21
0024 Variable Frequency Drives (VFDs) on all Pumps and Fans > 10 HP	7.32	7.45	7.21
0142 Agricultural Irrigation as a Flexible Demand Load	6.81	7.41	5.96
0193 Building Performance Standards (BPS) Accelerator	7.30	7.37	7.62
0080 Smart Electric Panels	6.44	7.28	6.08
0022 Smart Home	7.14	7.02	6.21
0010 High Performance Windows	7.51	6.14	6.96
0222 Residential Smart-Splitting	5.49	6.08	4.83

Top four ideas moving to Stage 2 scoring



- Used guidance from MTAB and decision priorities to recommend four ideas to advance to Stage 2 scoring
- Ideas ranked and reviewed both by final weighted score and TSB-weighted score
- Team assessment of ramp rate and other key drivers also considered



Next steps for Batch 3 Ideas

- Top four ideas being assessed and prioritized
- CalMTA will bring one – two ideas to MTAB with a recommendation memo in 1st quarter 2025
- If accepted, the idea(s) will progress to Advancement Plan development
- Advancement Plan(s) are expected to be completed in 3rd quarter 2025



Questions?

Comments?

SECTION 03

Operations

Stacey Hobart

Principal of Engagement and
Communications

CalMTA is a program of the California Public Utilities
Commission and is administered by Resource Innovations



Operations activities summary



○	◐	●
To be started	In process	Completed

3 rd quarter activity	Q1	Q2	Q3	Q4
Hold an in-person MTAB meeting (July)			●	
Hold a virtual MTAB meeting (September)			●	
Finalize and file 2025 ABAL			●	
Finalize Solicitation Protocols			◐	
Release a Q2 2024 Update			●	
Finalize CalMTA program-level Key Performance Indicators & Scorecard			●	
Recruit and form an evaluation advisory group with charter			●	
Release second ESJ Listening Session summary			●	
Recruit and form an equity sounding board				●

Engagement highlights: Reports & education



- Kicked off *Idea to Initiative* campaign in August to educate audiences about the MTI Plans for Room Heat Pumps and Induction Cooking.
- Released reports: 2024 2nd Quarter Report, CRAWs, RHPWH and Foodservice Water Heating System Advancement Plans; public comment periods were opened for Advancement Plans and comment response memos published.



Engagement highlights: Equity Sounding Board



Completed Equity Sounding Board Recruitment

- This group will support our efforts to apply an equity lens in the development of a market transformation portfolio for California.
- The Equity Sounding Board will meet virtually three times in 2025 and conduct review and feedback activities as needed. Recruitment efforts resulted in 25 applications for the 6-8 member Sounding Board.
- Learn more about the Equity Sounding Board here: <https://calmta.org/equity-sounding-board/>.

Engagement highlights: Equity Sounding Board Members



Current Members

Adriana Ayala, Ph.D. | Executive Director, Chicana Latina Foundation

Alicia Bohigian | Assistant Program Director, Self-Help Enterprises

Dr. Federico Castillo | Project Scientist and Lecturer, University of California, Berkeley

Maria Dahlin | Tribe Council Member, N'de Apache Tribe

Michelle Engel-Silva | CEO, Proteus, Inc.

Elisa Gallegos Jackson | Nurse, Retired Public Health Nurse, Community Health Educator and Independent Consultant

Joaquin Narvaez | Owner, West Coast Green Builders LLC

Engagement highlights: Evaluation Advisory Group



Recruited and seated the Evaluation Advisory Group



- This five-member team of experts provide guidance and unbiased recommendations on the MTI Evaluation Plans and planning, selection, and review of third-party MTI evaluation activities.
- The Evaluation Advisory Group helps to ensure high quality, credible, and appropriately independent evaluations.
- More information about the Evaluation Advisory Group can be found here: <https://calmta.org/evaluation-advisory-group/>.

Stakeholder engagement highlights: Evaluation Advisory Group Members



Current Members

Christie Torok | CPUC Energy Division Evaluation Lead

Karen Horkitz | CalMTA Market Research and Evaluation Lead,
Senior Market Transformation Advisor to the Cadmus Group

Alexandra Dunn | Director at ILLUME Advising

Rafael Friedmann | Friedmann Clean Energy Consulting

Fred Gordon | Independent (formerly Energy Trust of Oregon)

Engagement highlights:

Engagement & outreach



- Ongoing coordination with program administrators, codes & standards working group, and other efficiency stakeholders.
- CalMTA staff attended or presented at three industry conferences and meetings.
- Rachel Good presented a white paper, *An equity lens for market transformation: Delivering ESJ benefits at scale through an integrated program design approach*, at the ACEEE Summer Study on Energy Efficiency in Buildings 2024.
 - Explains a more integrated approach that maximizes benefits to communities that have faced a disproportionate energy burden and limited efficiency investment.

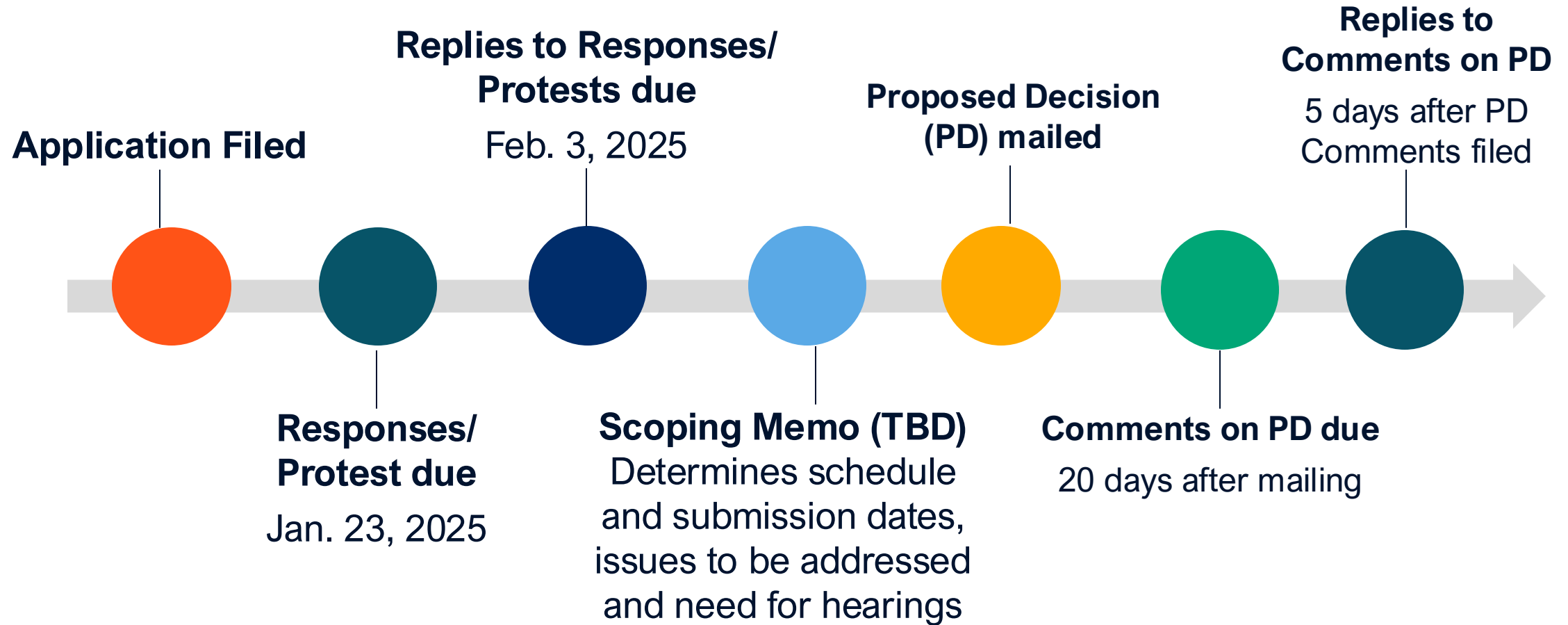
Administration & operations highlights



High-level 3rd quarter administration & operation activities included:

- Worked with internal teams to develop high-level program deliverable timelines to include in the 2025 Operations Plan.
- Coordinated with CPUC Energy Division to plan for the year-end application filing with the first batch of MTI Plans.
 - Forecasted high-level timelines and deliverables to 2030.
 - Began development of a cost estimate for the five-year implementation phase of CalMTA.

Key Milestones of Application Proceeding



<https://pgera.azurewebsites.net/Regulation/search> (search on Statewide Energy Efficiency MT Initiative)

Administration & operations highlights cont.



- Continued refinement of Solicitation Protocols which are currently in CPUC review.
- Prepared for and facilitated four virtual MTAB meetings.
 - Tracked communication and feedback from MTAB members on the Room Heat Pumps and Induction Cooking initiatives that will be filed in the 4th quarter.
- Surveyed MTAB members to provide feedback on the Conflict of Interest Rules attached to the MTAB Charter.



Questions?

Comments?

SECTION 04

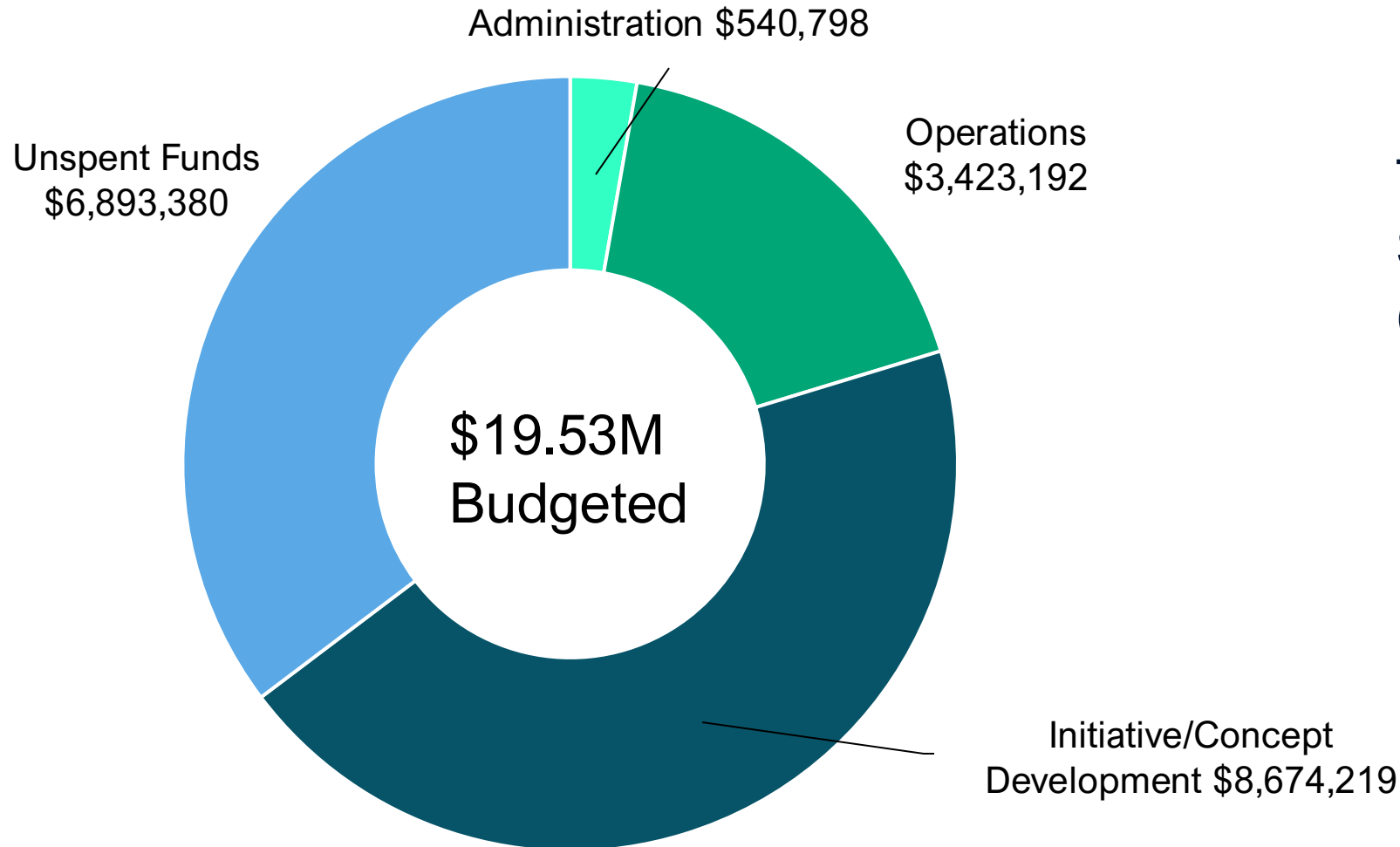
Financial Reporting

Jim Giordano
Principal of Operations

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Expenditures through the 3rd quarter



Total spent through Sept. = **\$12,638,210**
(64% of Budget)

Budget detail: Admin and operations



Cost Category	Major Activity	\$ Spent (Through 3Q)	Funding Allocation	Balance Remaining	% Spent
Administration	1. Routine Financial & Administrative Tasks	\$ 540,798.21	\$ 1,011,287.00	\$ 470,488.80	53.5%
	Administration Subtotals	\$ 540,798.21	\$ 1,011,287.00	\$ 470,488.80	53.5%
Operations	2. Project Management	\$ 708,854.58	\$ 868,390.00	\$ 159,535.42	81.6%
	3. MTAB Operations	\$ 268,646.25	\$ 510,259.00	\$ 241,612.75	52.6%
	4. Policy	\$ 427,287.61	\$ 482,810.00	\$ 55,522.39	88.5%
	5. Stakeholder Engagement and Communications	\$ 1,517,987.55	\$ 1,759,515.00	\$ 241,527.46	86.3%
	6. Data Systems Development and Management	\$ 500,416.99	\$ 823,217.00	\$ 322,800.02	60.8%
	Operations Subtotals	\$ 3,423,192.97	\$ 4,444,191.00	\$ 1,020,998.03	77.0%

Budget detail: Initiative/concept dev.



Cost Category	Major Activity	\$ Spent (Through 3Q)	Funding Allocation	Balance Remaining	% Spent
Initiative/Concept Development	Concept Development (Phase I Activities)	\$ 3,681,303.81	\$ 4,140,975.00	\$ 459,671.19	88.9%
	7. Technology Scanning and RFI Support	\$ 234,508.22	\$ 455,500.00	\$ 220,991.78	51.5%
	8. Outreach, Reporting, Research	\$ 560,432.85	\$ 582,278.00	\$ 21,845.15	96.2%
	9. Preliminary Benefit Analysis & Forecasting Models	\$ 379,862.80	\$ 561,751.00	\$ 181,888.20	67.6%
	10. Advancement Plan Development & Reporting	\$ 2,506,499.94	\$ 2,541,446.00	\$ 34,946.06	98.6%
	Program Development (Phase II Activities)	\$ 4,992,915.89	\$ 9,935,138.00	\$ 4,942,222.11	50.3%
	11. Program Strategy Development	\$ 3,995,305.78	\$ 6,318,638.00	\$ 2,323,332.22	63.2%
	Policy Development & Evaluation	\$ 256,437.82			
	Portable/Window HPs	\$ 1,416,316.90			
	Induction Ranges & Cooktops	\$ 1,415,501.30			
	ERTUs	\$ 865,538.70			
	Food Service HPWH	\$ -			
	Res HPWH	\$ 28,109.73			
	CRAWS	\$ 13,401.33			
	12. Program Strategy Testing/Pilots	\$ 997,610.12	\$ 3,616,500.00	\$ 2,618,889.89	27.6%
	Portable HP Self-Installation Pilot	\$ 480,211.65	\$ 725,000.00	\$ 244,788.35	66.2%
	ESRPP for Equity Pilot (Non-Incentive Charges)	\$ 156,778.01	\$ 1,525,000.00	\$ 1,368,221.99	10.3%
	ESRPP for Equity Pilot Incentives	\$ 217,100.00			
	Chefluencer Pilot	\$ 143,520.46	\$ 866,000.00	\$ 722,479.55	16.6%
	Available Funding for Future Strategy Pilots		\$ 500,500.00		
Initiative/Concept Development Subtotals		\$ 8,674,219.70	\$ 14,076,113.00	\$ 5,401,893.30	61.6%

Summary of 3rd quarter funding shifts



Major activities	Budget increase or (decrease)
Concept Development (Phase I)	
<i>Preliminary Benefit Analysis & Forecasting Models</i>	(\$100,000)
<i>Outreach, Reporting, Research</i>	\$100,000
<i>Technology Scanning and RFI Support</i>	(\$600,000)
<i>Advancement Plan Development</i>	\$740,000
Program Development (Phase II)	
<i>Program Strategy Development</i>	(\$140,000)



Note: \$500,000 was shifted on 7/15 as documented in Appendix A of CalMTA's 2025 ABAL. The balance of funds were shifted on 9/16/24.



Questions?

Comments?



Transformative Energy Solutions for the public good

Market transformation is a proven approach that works to remove market barriers so that energy efficient, equitable, and climate-friendly approaches become the new standard practice for all Californians.

Sign up for updates at: calmta.org/contact/

Questions? Email info@calmta.org

Follow us at [linkedin.com/showcase/calmta/](https://www.linkedin.com/showcase/calmta/)