

CaIMTA Orientation for MTAB Nominees

New opportunities for advancing energy
efficiency

Introductions of MTAB Nominees and RI Staff



Name and employer



Experience with market transformation



Name one “wish” for market transformation in CA

Agenda

Time	Agenda Item	Presenter
10:00	1. Welcome	
10:05	2. Introductions	All
10:15	3. Meeting Agenda	Margie Gardner
10:25	4. Ice Breaker	All
10:40	5. CaIMTA Overview	Margie Gardner
11:10	6. MTAB Orientation	Stacey Hobart
11:35	7. Market Transformation Introduction	Jeff Mitchell
11:55	8. Public Comment	
12:05	Lunch break (45 min)	
12:50	9. Creating Market Transformation Success	Margie Gardner

Time	Agenda Item	Presenter
1:35	10. Market Transformation Initiatives Exploration	Karen Horkitz
2:20	Break (20 min)	
2:40	11. Introduction to MTI Development Process	Margie Gardner
3:00	12. Phase 1: MTI Concept Development Process & Deliverables	Jeff Mitchell
3:40	13. Public comment	
3:50	14. Next Steps & Next MTAB Meeting	Margie Gardner
4:00	Adjourn	

Phone participants can raise their hand during the public comment period and will be unmuted.

Ice Breaker

"When have you done something that was new and creative (work or home)?"

CaIMTA Overview

Agenda Item #5

Margie Gardner | VP Market Transformation







CaIMTA

April 19, 2023, NRDC Offices

Meet CaIMTA

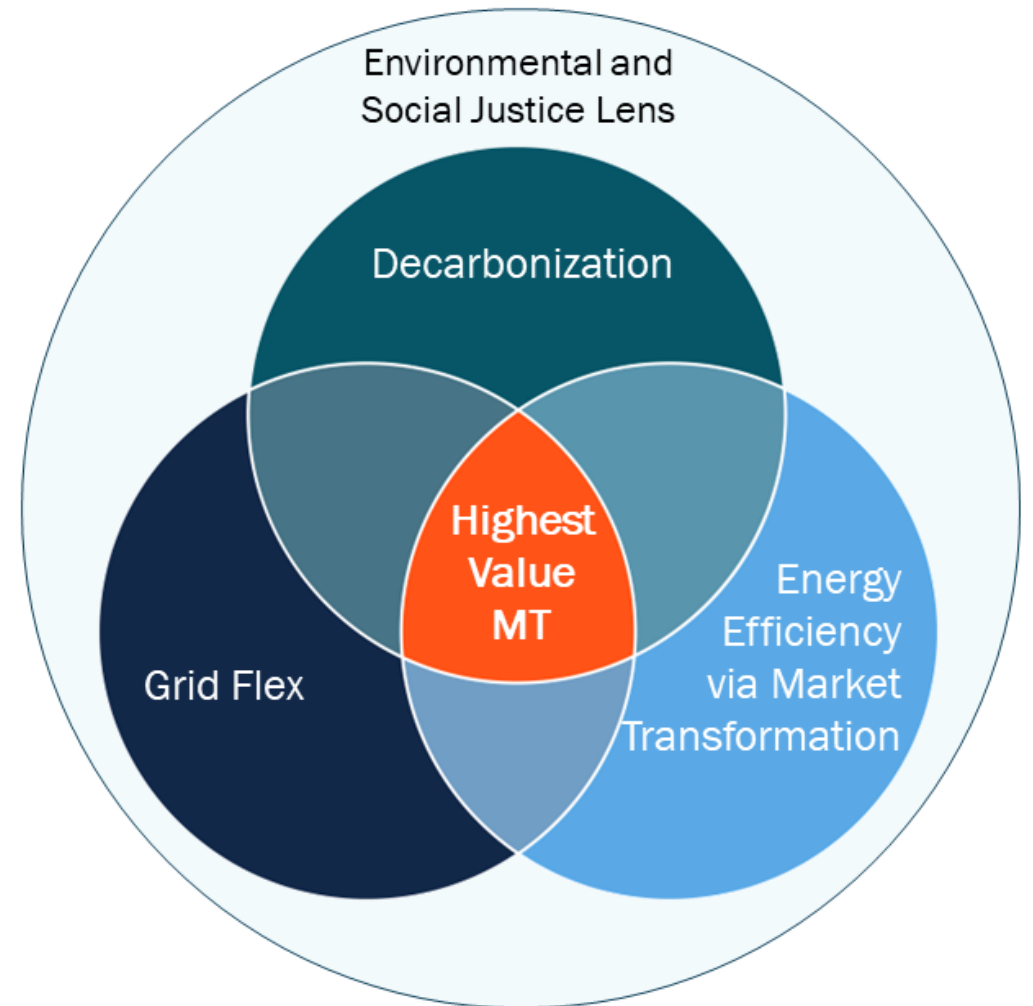
- CPUC created a Market Transformation Framework (D.19-12-021)
- Resource Innovations named Administrator
 - Supported by other expert firms
- New CaIMTA develops & manages MT initiatives (MTIs) with MT Advisory Board input
- Responsibilities eventually transition to a nonprofit

Our team of experts & roles

	<p>CalMTA Administrator & overall management</p>
	<p>Market research and MT evaluation expertise</p>
	<p>Support MTI development & assessment</p>
	<p>Support MTI strategy and deployment</p>
	<p>Ensure ESJ, WET & DEI are embedded in MTIs</p>
	<p>Support ESJ & diversity, equity & inclusion goals</p>
<p>Senior Advisors:</p>	<p>Steve Schiller, Ralph Prah, and Steve Nadel</p>

How we work

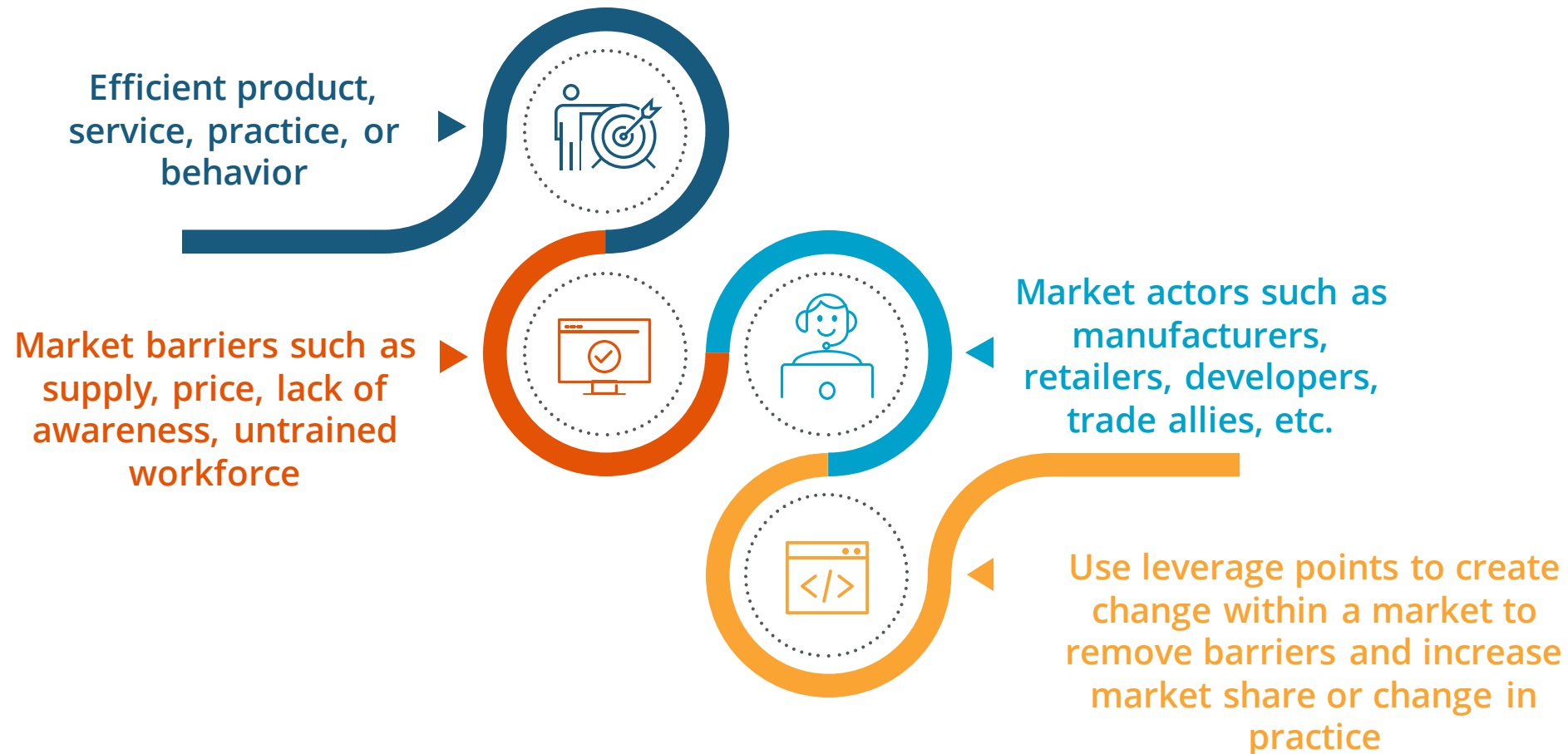
- Collaborate with existing EE efforts
 - Avoid duplication
 - Faster scale
- Advance other state goals: GHG reduction, WE&T, environmental and social justice (ESJ)
- Add value to grid health: “grid flex”
- Ensure initiatives meet MT criteria



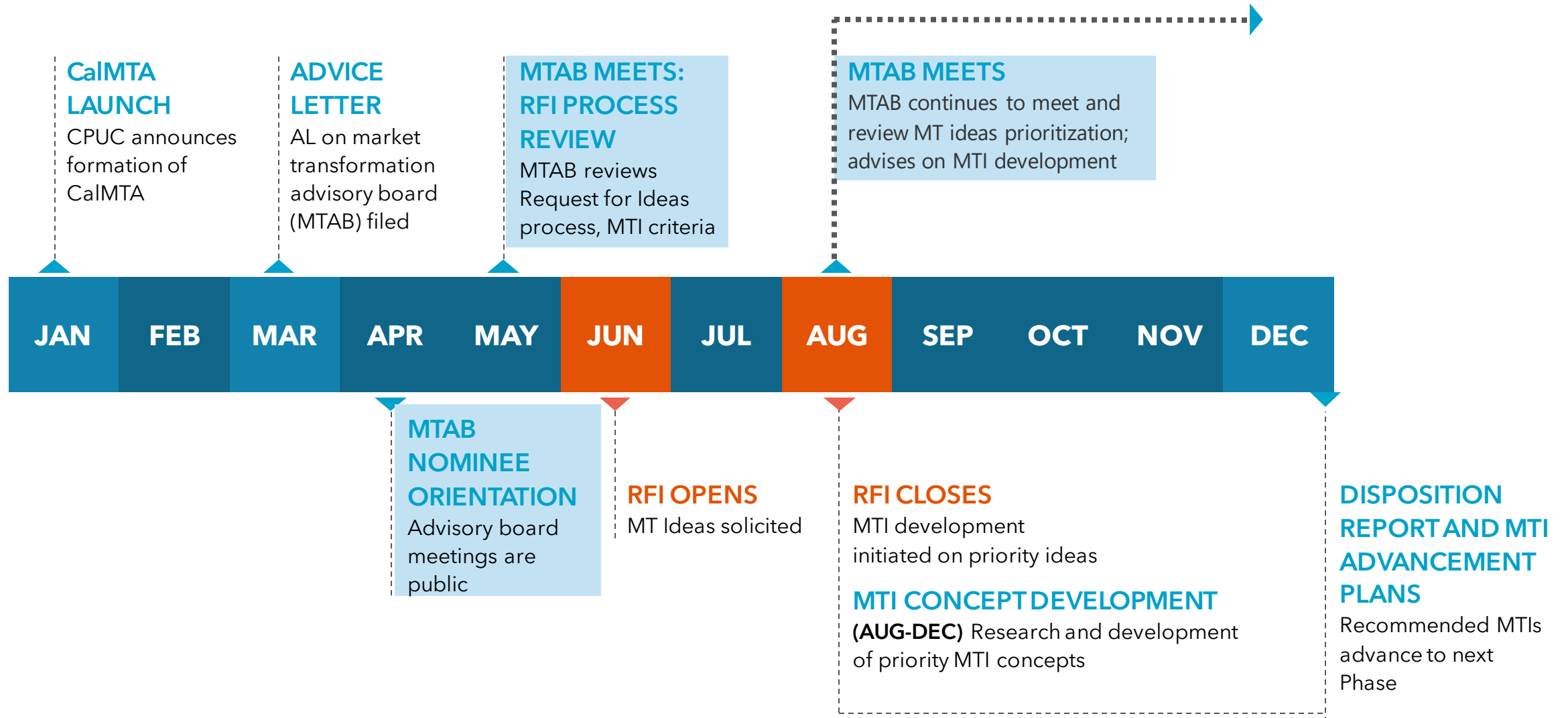
Market Transformation

“The strategic process of intervening in a market to create lasting change by removing market barriers or exploiting opportunities, accelerating the adoption of identified technologies or practices.”

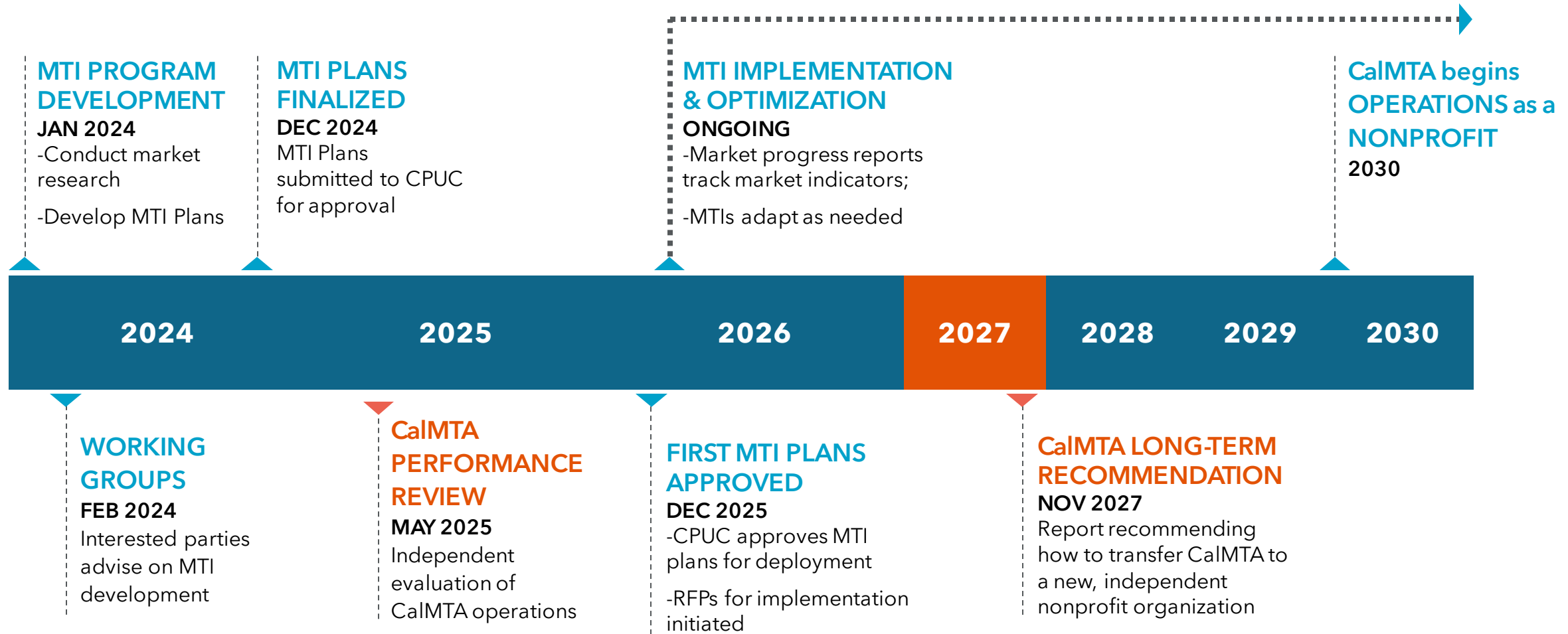
Strategic Market Intervention



Milestones 2023



Milestone Timeline 2024 - 2030



Market Transformation Advisory Board Background

Agenda Item #6

Stacey Hobart | Principal, Stakeholder Engagement & Communications

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Orientation

- **This meeting is an orientation only**
 - MTAB members and charter need to be confirmed by CPUC
 - Anticipated to occur soon

9 Nominees by Category Found in CPUC Decision

Lujana Medina, SoCal REN
CCA/RENs

Hayley Goodson, TURN
Ratepayer advocacy/protection

Ky-An Tran, Cal Advocates
Ratepayer advocacy/protection

Peter Miller, NRDC
Environmental advocacy

Fred Gordon, Energy Trust
Evaluation professional

Cyane Dandridge, Strategic Energy
Initiatives
Workforce and/or labor

Jeff Harris, NEEA
National/Regional EE policy
professional

Randall Higa, Southern California
Edison Investor-Owned Utility (IOU)

Christie Torok, CPUC staff
CPUC representative

MTAB Primary Role & Purpose



Advise on Ideation, Design & Implementation

- Provide expertise and unbiased, non-binding recommendations
- Responsible for reviewing selection criteria, advising on market transformation ideas, and initiative design and implementation



Diversity of Thought

- No more than 9 members to represent diverse viewpoints

Proposed Meeting Norms

- MTAB meetings are public
- Packet materials are sent a week in advance and should be reviewed before the meeting
- Member should attend at least 80% of the time
 - If can't make a meeting, notify CalMTA in advance and someone else from the organization can attend as proxy
 - Recommendations should be constructive
 - Silence means agreement

Proposed Meeting Norms

- MTAB meeting minutes will summarize the discussion and any recommendations
 - Minutes serve as the record of MTAB recommendations
 - Each MTAB meeting will ask for acceptance or edits of the prior meeting minutes
 - Any member may choose to write a summary of their own view, which will be appended to the minutes.

MTAB Charter & Conflict of Interest

Pending CPUC approval

Charter: Roles & Responsibilities



The MTAB is a non-authoritative body, making non-binding recommendations. Members:

- Understand/are dedicated to supporting CaIMTA goals
- Attend all meetings and come fully prepared
- Participate constructively in meetings, helping to create reasonable solutions
- Serve as educators of market transformation efforts

Charter: Other Aspects



Terms

- Two-year terms ($\frac{1}{2}$ of first terms are 1-year)



Removal

- Members can be removed by agreement of CPUC/CalMTA for not meeting obligations



Vacancy

- Notification of openings will be posted, distributed to interested parties for 2 weeks



Stipend

- MTAB members are volunteers and not employees
- Stipend from meetings will be provided and travel expenses covered



Meetings & Records

- Public meetings announced at least 4 business days prior
- Members of the public can comment at meetings
- Written minutes will be prepared

COI Policy – Pending CPUC Approval

- Eligibility
 - Can't receive funding from CalMTA or be in pursuit of funding
- Recusal Requirements
 - Can't bid on RFP/RFQ if give input on MT idea after Concept Development Phase I
 - Can recuse from that MT idea discussion, but must leave MTAB if respond to RFP
 - If have competitive interest to an MTI or strategic prioritization, recuse from that discussion
 - Agree to not influence remaining MTAB
 - Interpretation if needed done by CPUC staff
- Disclosure
 - Complete publicly posted Disclosure Form with information about relationships
- Transparency
 - Public meetings & process where COI concerns can be raised by the public

Market Transformation Introduction

Agenda Item #7

Jeff Mitchell | Principal of MTI Development & Deployment
CalMTA

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Purpose

- Cover some basics of Market Transformation
- Get everyone excited about this opportunity to make a meaningful impact!



What is Market Transformation?

“The strategic process of intervening in a market to create lasting change by removing market barriers or exploiting opportunities, accelerating the adoption of identified technologies or practices.”

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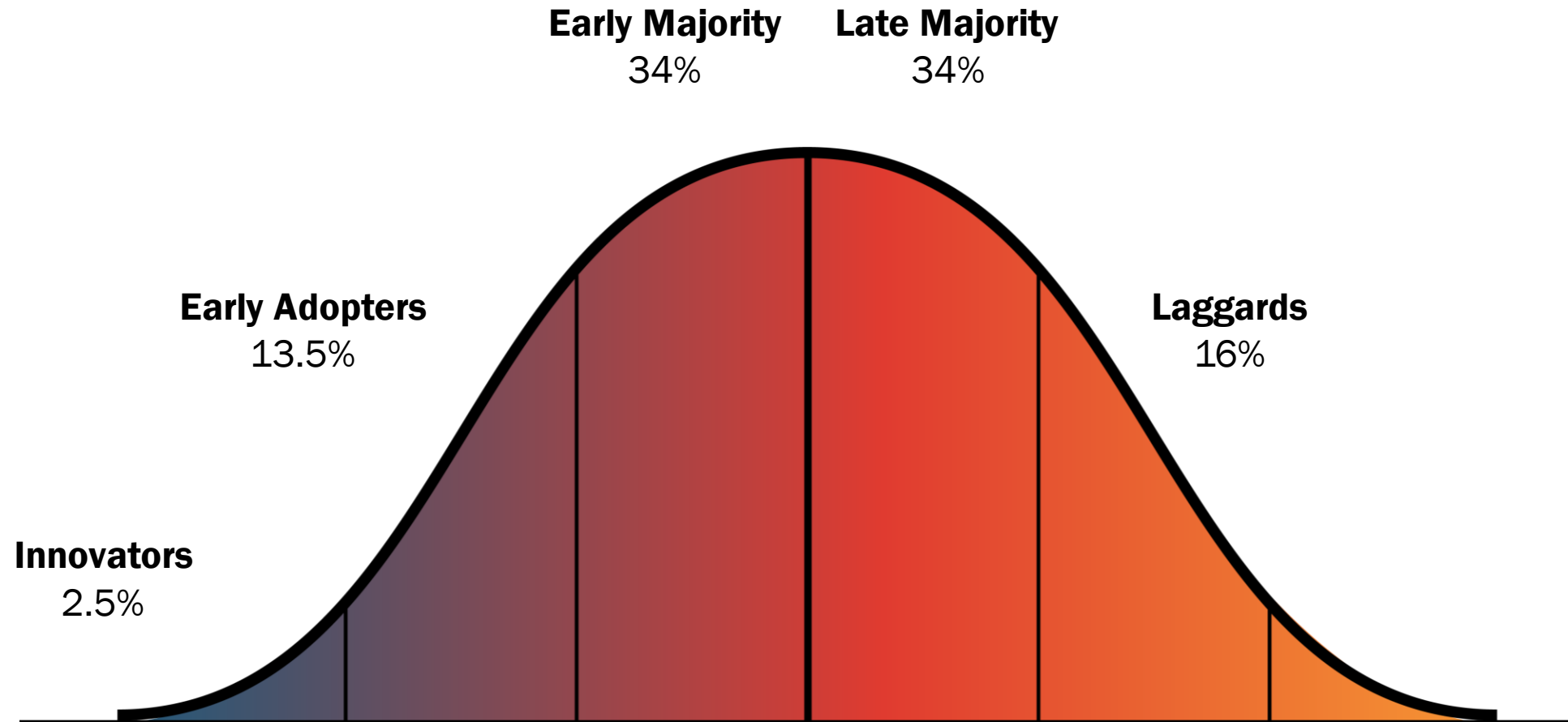




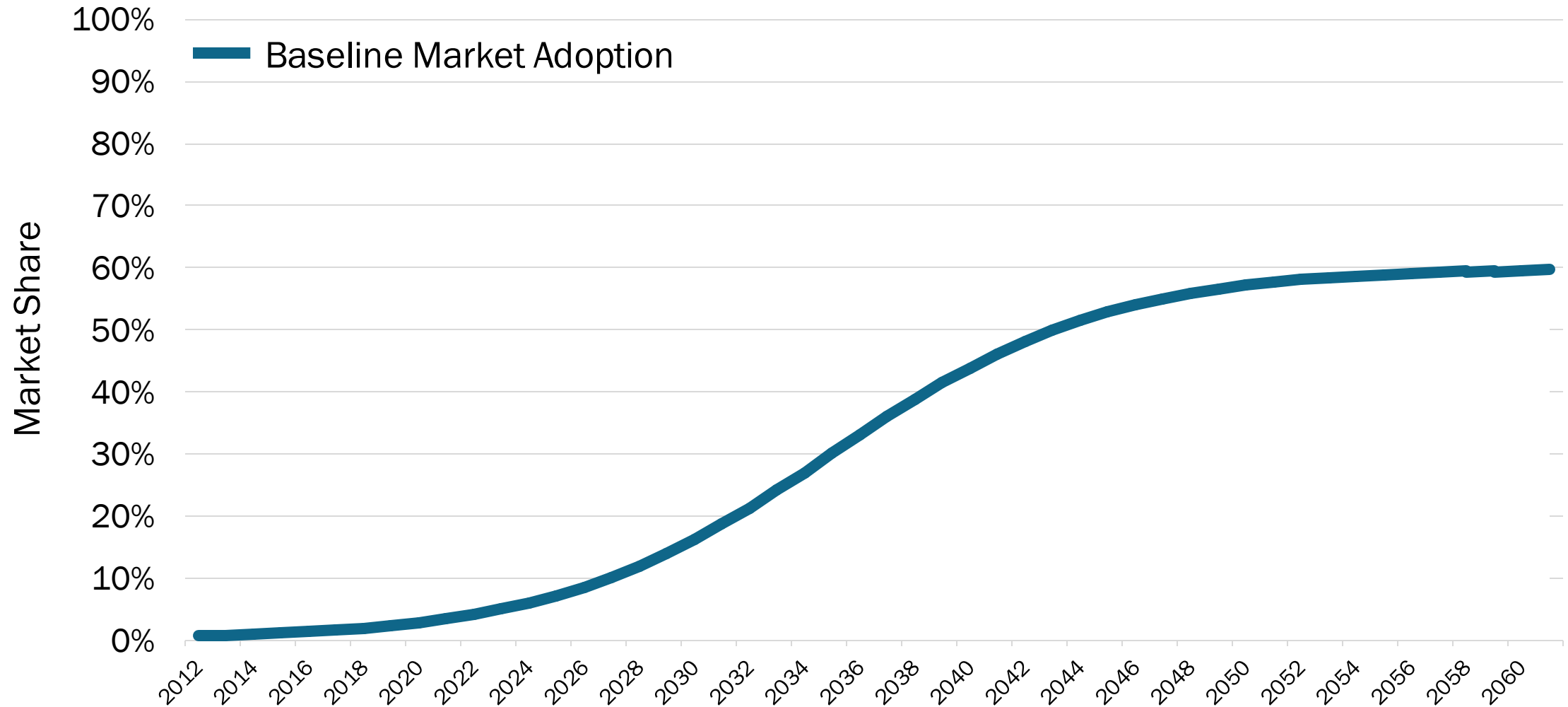




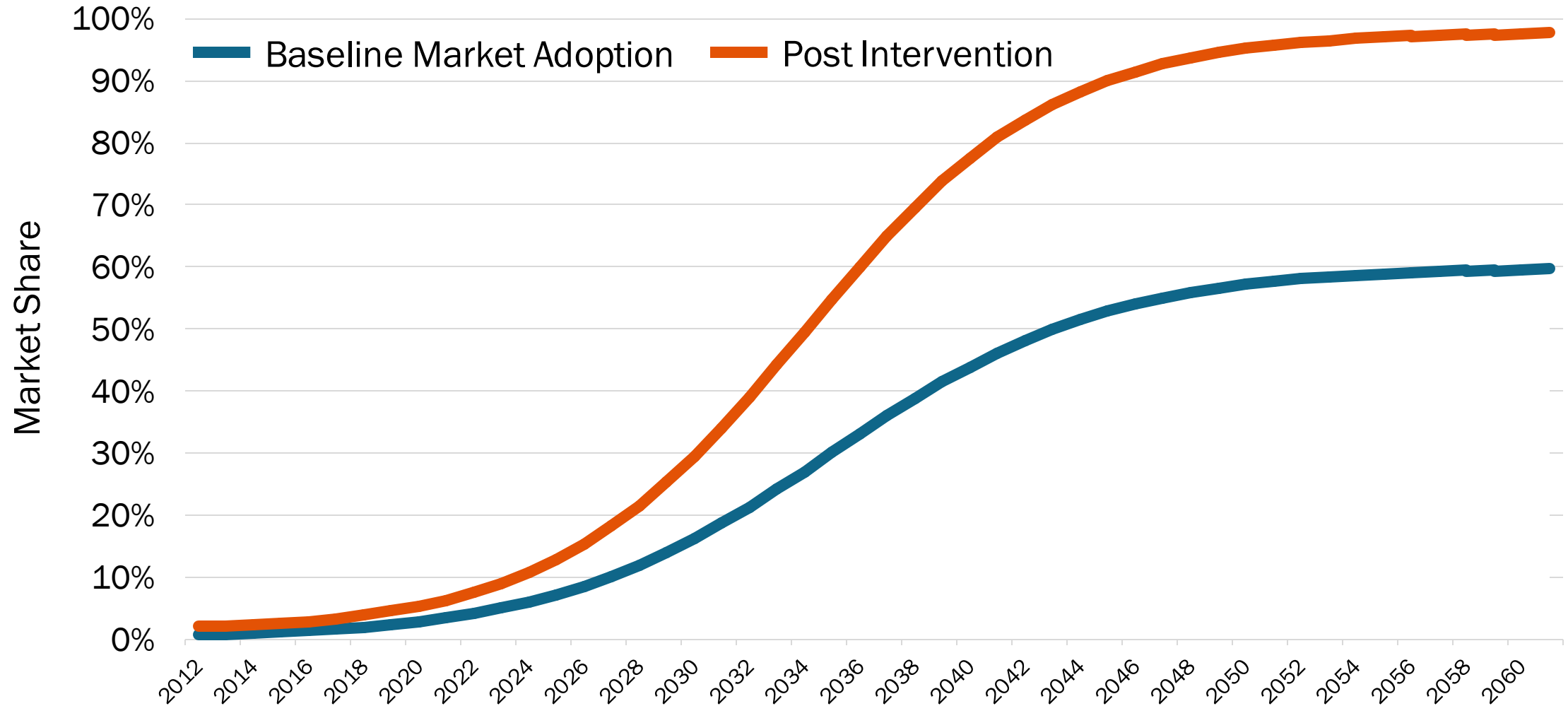
Market share of newly introduced technologies or practices



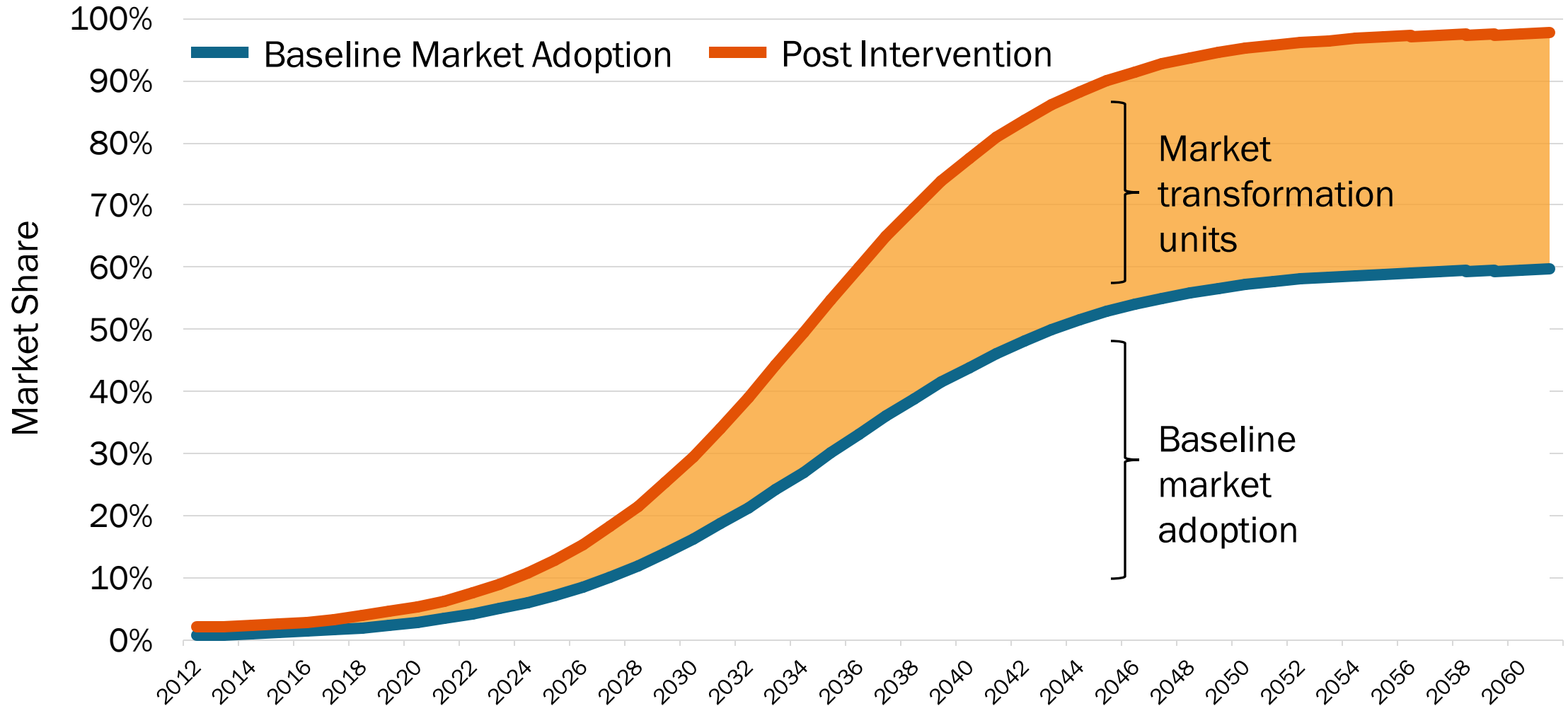
How innovations are adopted: the diffusion curve



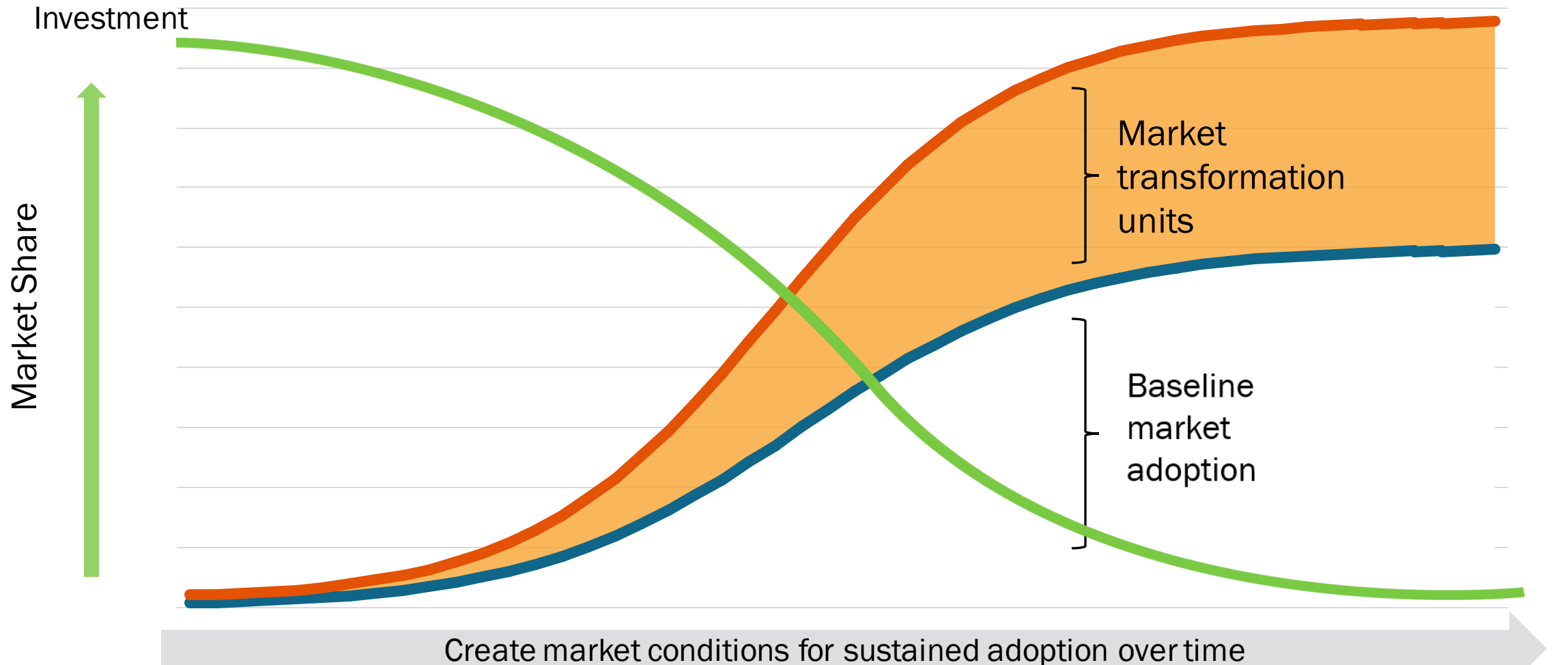
How innovations are adopted



How innovations are adopted



How innovations are adopted



Upcoming Event

Webinar: The Theory of Market Transformation

Friday, April 28, 2023 from 10:00 AM to 11 AM PDT

Market transformation is now launching in California under CalMTA. Join us for a session on the theory of market transformation and why it's an important part of the state's energy efficiency and decarbonization portfolio. CalMTA initiatives will work to strategically intervene in a market to create lasting change by removing market barriers or exploiting opportunities, accelerating the adoption of identified technologies or practices. This session will cover the basics of market transformation and the process from logic model development to exit strategy.

Register: https://us06web.zoom.us/webinar/register/WN_3Zw1BIRUTYOFgp5M2YnGvg

Public Comment

Please use the "raise hand" icon.
We will call your name and allow you to
unmute yourself

Lunch Break (45 min)



We will be back shortly

CaIMTA Orientation
for MTAB Nominees

Agenda Item #9: What does success look like?

“...assuring all communities have an opportunity to benefit, especially disadvantaged communities.

- Commissioner Shiroma

“...achieving deeper energy efficiency savings.

- SB350

“...delivering on the promise of new energy efficiency technologies.

- Commissioner Houck

“...Explain your proposed approach to GHG reduction objectives.

- RFP for MTA

Market Transformation Initiatives – an Exploration

Agenda Item #10

Karen Horkitz | Contractor

KSH Advising

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Break (20 min)



We will be back shortly

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for MTAB Nominees

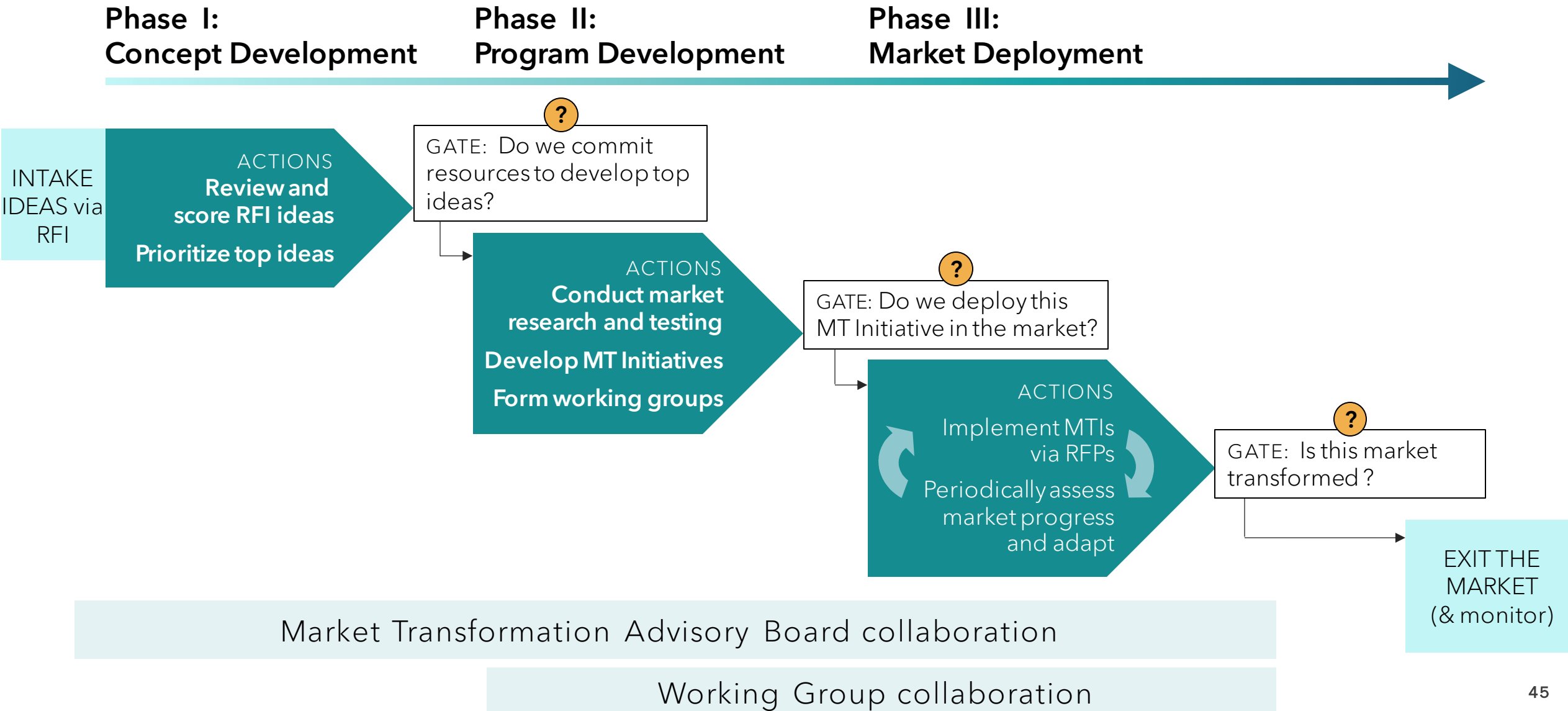
Introduction to CaIMTA MTI Development Process

Agenda Item # 11

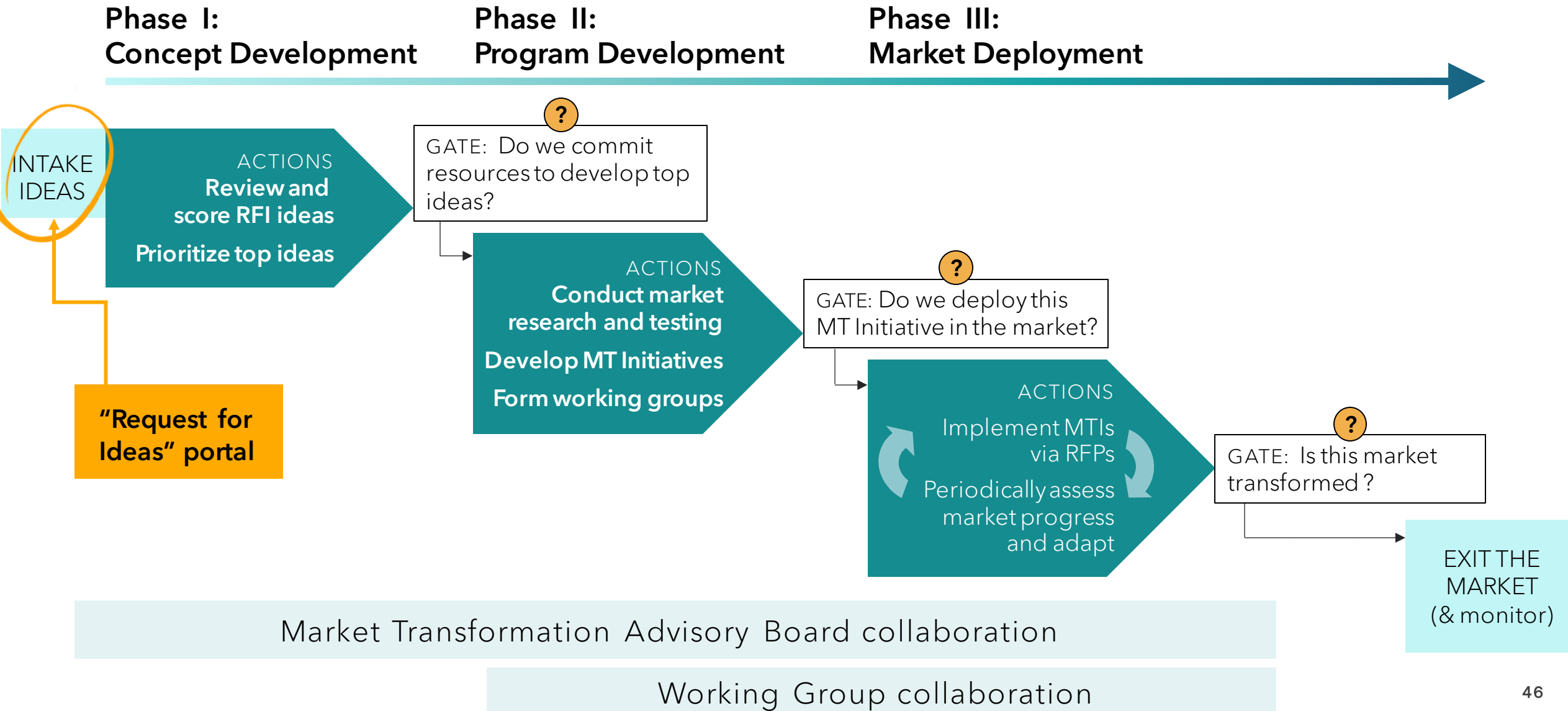
Margie Gardner | VP Market Transformation
CaIMTA

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CalMTA MTI Development Process



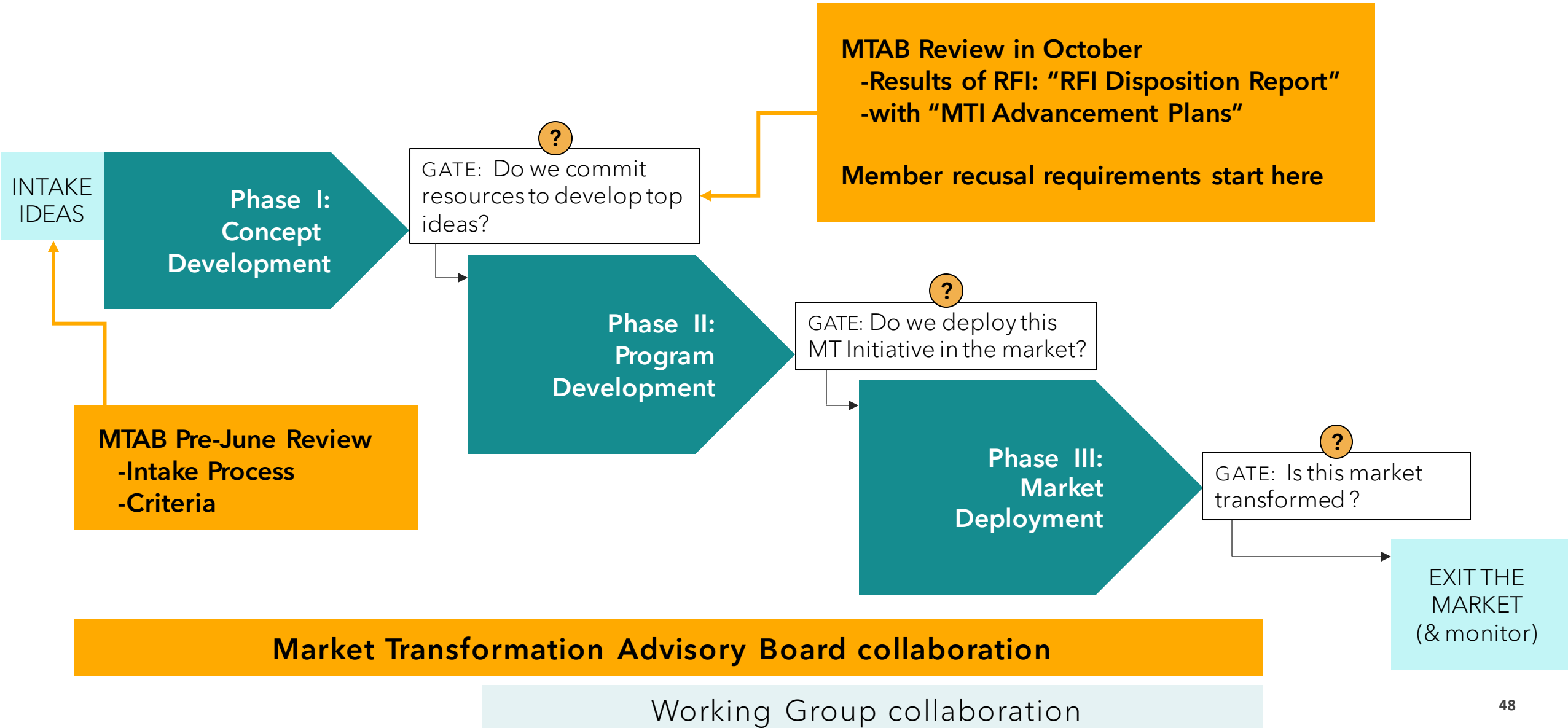
CaIMTA MTI Development Process



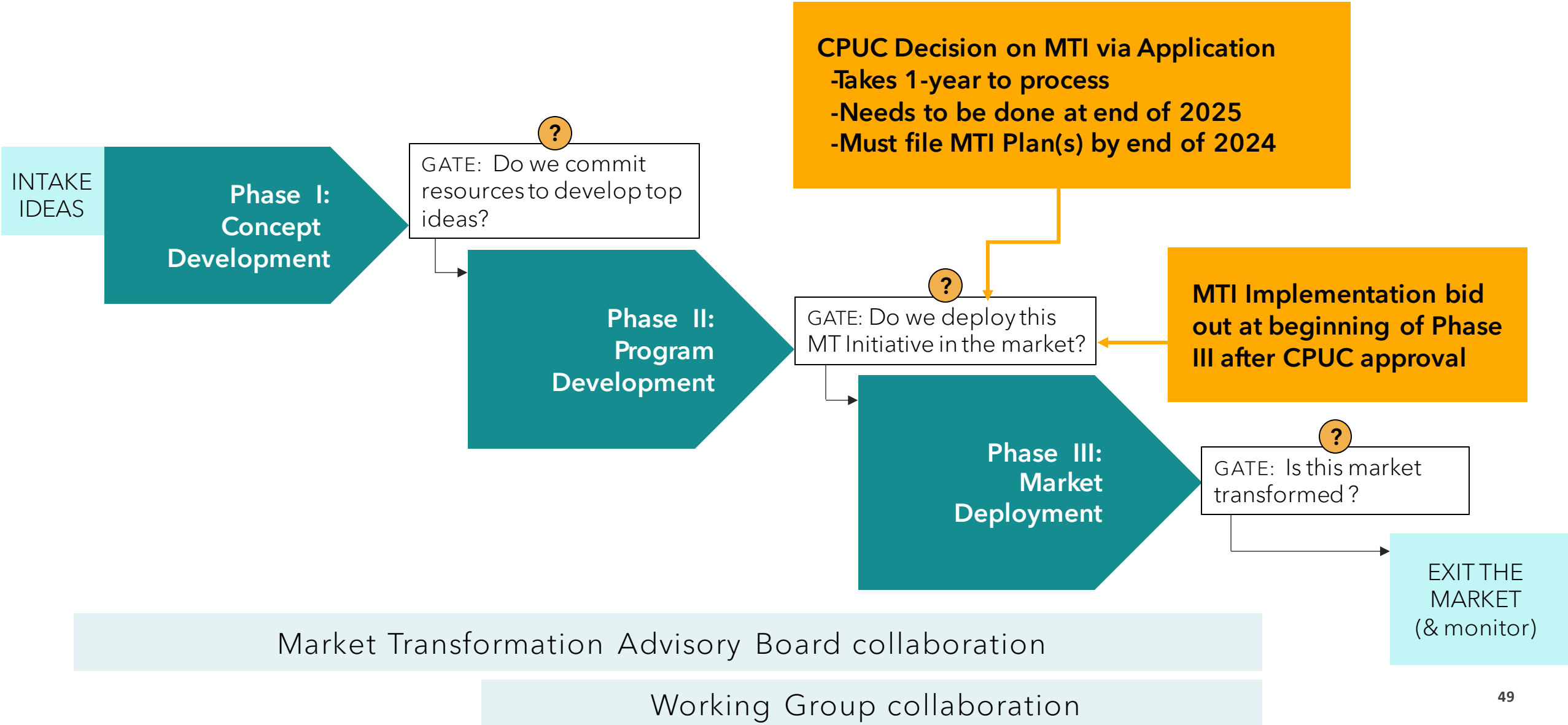
RFI Outreach Plan

- Goal is to increase RFI submissions
- Introduces CaIMTA, our purpose and how we will collaborate
- Starts in June and runs through RFI close (Aug) with:
 - Unique campaign look and call to action
 - Individual and public briefings
 - Sharing by efficiency industry allies (mailings, newsletters)
 - RFI spotlights at conferences and events
 - Articles and PSAs in industry trade media

CalMTA MTI Development Process - **MTAB**



MTI Development Process – CPUC & Implementers



CaIMTA MTI Development Process- Dive into Phase I



Phase 1: MTI Concept Development Process

Agenda Item #12

Jeff Mitchell | Principal of MTI Development & Deployment
CalMTA

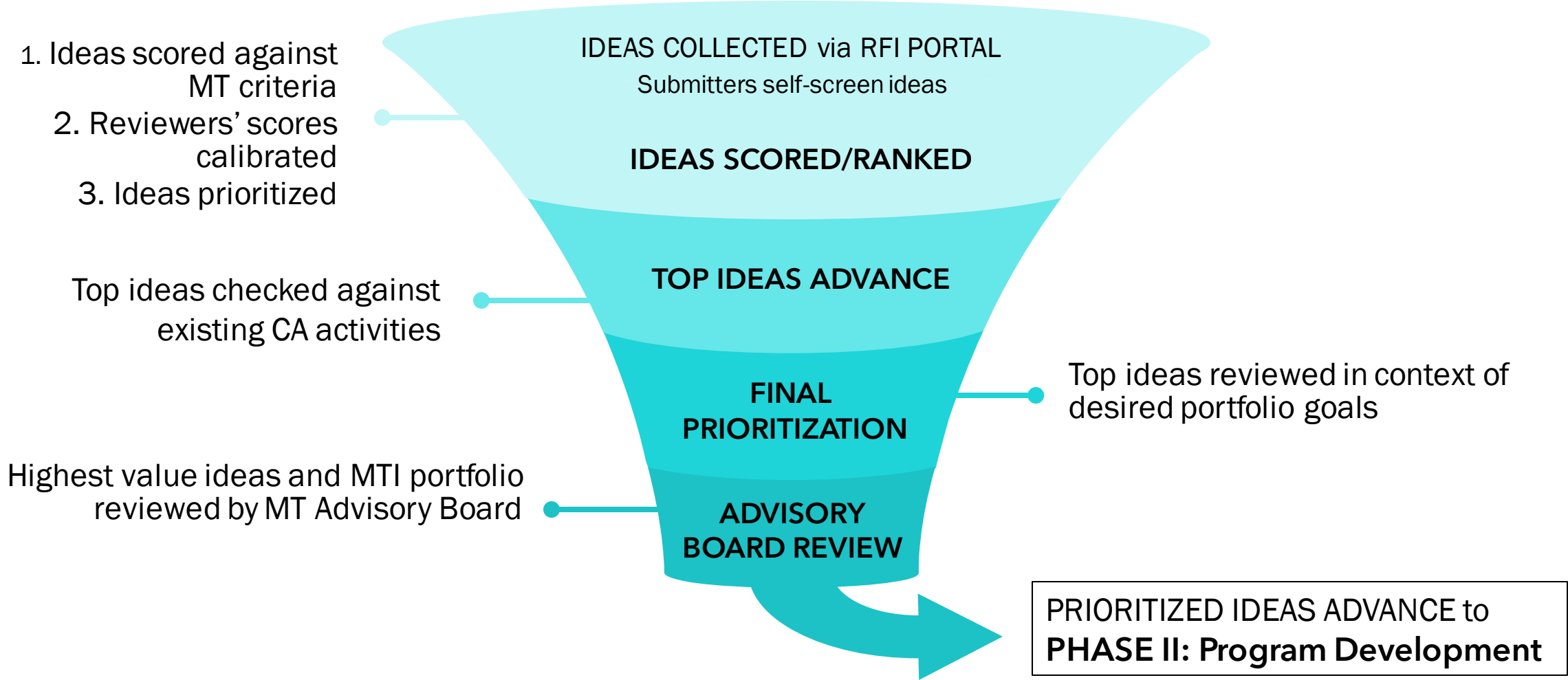
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TOPICS

1. MTI Development Process
2. Scoring Criteria
3. Portfolio Optimization
4. 2023 Outputs

MTI Development Process Phase I Concept Development

Which ideas merit program development?



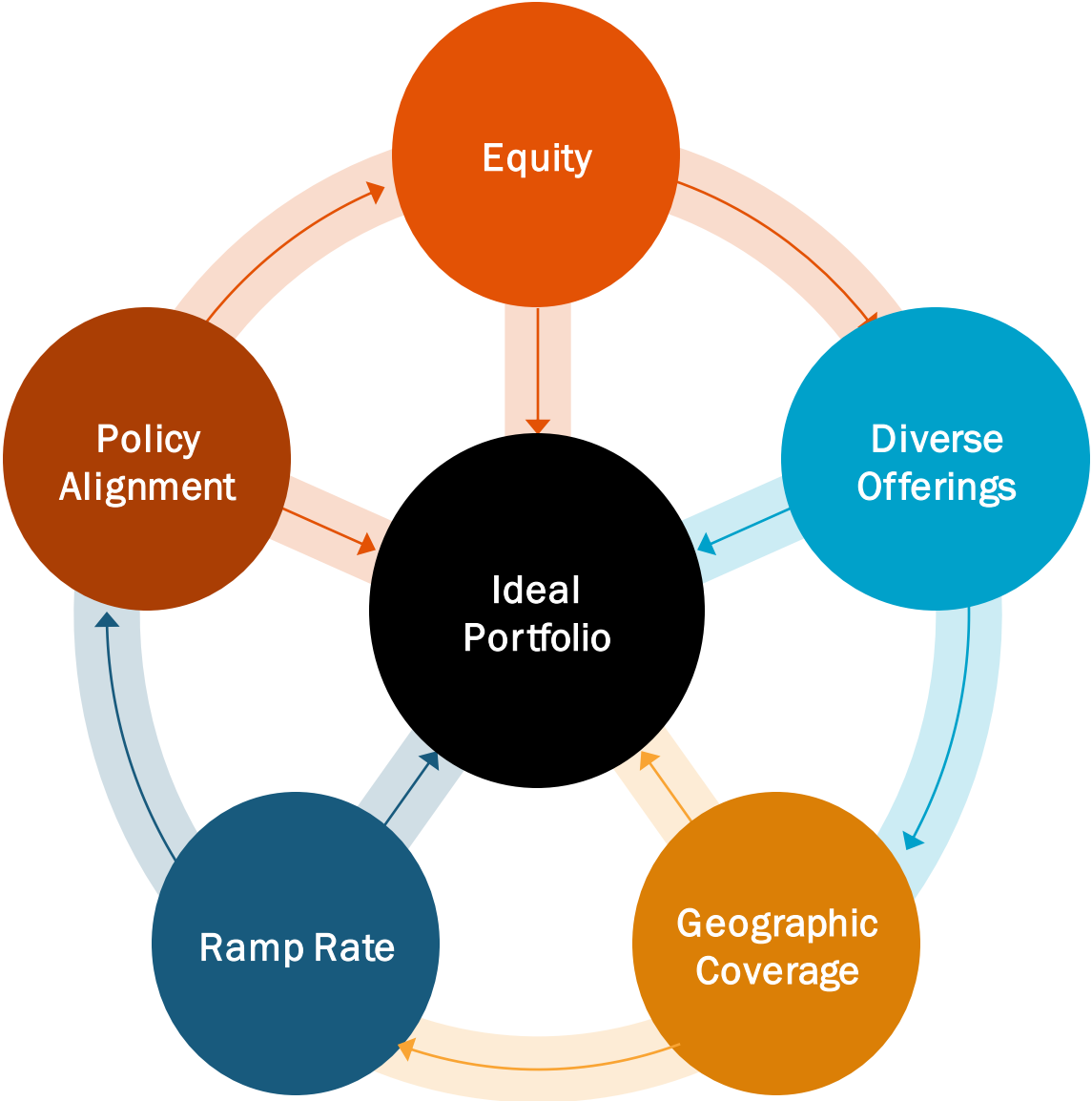
Scoring Criteria

Category	Criteria
Total System Benefit	<ul style="list-style-type: none"> • Energy savings • Grid benefits • GHG impacts
Readiness	<ul style="list-style-type: none"> • Product readiness
MTI Cost and Cost Effectiveness	<ul style="list-style-type: none"> • Initiative cost • Cost effectiveness
ESJ Impacts (Equity)	<ul style="list-style-type: none"> • Beneficial impacts to ESJ communities • Partnership opportunities with ESJ communities
Non-Energy Impacts	<ul style="list-style-type: none"> • NEBs that may impact MTI success
MT Alignment	<ul style="list-style-type: none"> • Innovation Characteristics • Market Leverage Points • Sustained Benefits

Criteria Weighting

Category	Weight	Criteria
Total System Benefit	25%	<ul style="list-style-type: none"> • Energy savings • Grid benefits • GHG impacts
Readiness	10%	<ul style="list-style-type: none"> • Product readiness
MTI Cost and Cost Effectiveness	5%	<ul style="list-style-type: none"> • Initiative cost • Cost effectiveness
ESJ Impacts (Equity)	15%	<ul style="list-style-type: none"> • Beneficial impacts to ESJ communities • Partnership opportunities with ESJ communities
Non-Energy Impacts	15%	<ul style="list-style-type: none"> • NEBs that may impact MTI success
MT Alignment	30%	<ul style="list-style-type: none"> • Innovation Characteristics • Market Leverage Points • Sustained Benefits

Proposed Portfolio Characteristics



Disposition Report & MTI Advancement Plans-Content

Disposition Report

- Process Overview
- Response Data
- MTI Submission Summary
 - Submission metrics (sector, number, etc.)
- Advancement Recommendations

MTI Advancement Plan(s)

- Product narrative
- MT Opportunity
 - Preliminary MT Theory
 - Target Market
 - Draft Logic Model
 - Gap Analysis
- Phase 2 Research Plan
 - Objectives
 - Methods
 - Deliverables/Milestones
 - Estimated Budget

Public Comment

Please use the "raise hand" icon

We will call your name and allow you to unmute
yourself






Next Steps & Next Meeting

Agenda Item #14

Margie Gardner | VP Market Transformation

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Approximate Meeting Date	Format	Anticipated Topics
April 19	In-person	Overall orientation; Criteria; Intake process
May 26	In-person	MTI process, especially Phase I Criteria Portfolio characteristics
~June 7	2-hour virtual 	(If needed) Continued criteria discussion
		<i>RFI Opens – mid-June</i>
Early August	2-hour virtual 	Mid RFI updates
		<i>RFI Closes – mid-August</i>
~Sept 7	2-hour virtual 	Initial summary of RFI ideas Portfolio considerations
~Sept 27	In-person	Prioritization of RFI ideas
~Nov 8	In-person	Draft Disposition Report Early drafts of Advancement Plans
~Dec 11	2-hour virtual 	Follow up on Disposition Report or Advancement Plans
~Jan 17	2-hour virtual 	Review Final Disposition Report & Advancement Plans

Thank you
for attending the
CalMTA Orientation for
MTAB Nominees!
Please visit our website: Calmta.org