



Draft RFI Disposition Report Outline

I. **Executive Summary (3 pages)**

- a. Provides a brief summary of the report including CalMTA purpose, the RFI, and CalMTA recommendations
 - i. Background on CalMTA
 - ii. Purpose and scope of this report
 - iii. Brief RFI context such as release, due dates, and number of submissions received
 - iv. MTIs moved to Phase 2

II. **Introduction (1-2 pages)**

- a. Summarizes CalMTA background and development in California for report context

III. **Scoring Framework (7 pages)**

- a. Scoring Categories and Criteria
 - i. Describes the categories used to score, rank, and select the submitted ideas
 - ii. Table: Categories and criteria
- b. Category and Criteria Weights
 - i. Describes the weighting strategy for both the scoring categories and criteria, for both Stage 1 and Stage 2
 - ii. Table: Stage 1 and Stage 2 category and criteria weights
- c. Scoring Rubric
 - i. Describes the scoring strategy, including the score options and points available for each criteria
 - ii. Table: Rubric overview
 - iii. Appendix: Detailed scoring instructions and score options
- d. Portfolio Characteristics
 - i. Discuss portfolio priorities that will be considered by the CalMTA team and how adjustments may be made in the rankings to fill deficiencies

IV. **RFI Outreach (3 pages)**

- a. Key RFI Outreach Milestones
 - i. Provides an overview of the RFI time horizon for context
- b. CalMTA Outreach
 - i. Describes the key stakeholder segments targeted by the CalMTA outreach and the types of outreach activities conducted
 - ii. Appendix: List of organizations and briefings held

- c. Submission Support
 - i. Describes the resources developed and provided to support submitters in their idea development
- d. Stakeholder Feedback on RFI
 - i. Describes the stakeholder feedback received by the CalMTA team about the process and requirements as well as the actions that will be taken to refine the RFI process in future cycles

V. Summary of MTI Ideas Received (5 pages)

- a. Summarizes the submissions received across metrics of interest, including:
 - i. Technology versus service
 - ii. Market sector
 - iii. Load type
 - iv. Other notable characteristics
 - v. Submissions by week
 - vi. Appendix: Short descriptions of each of the MTI ideas received

VI. Submission Scoring (8-10 pages)

- a. Overview of Scoring Process
 - i. Summarizes the scoring process from threshold review to portfolio optimization
 - ii. Identifies the set of ideas that did not pass the threshold criteria and the reasons why.
- b. Stage 1 Scoring
 - i. Describes the Stage 1 scoring process, the scoring results, and the ideas advancing to Stage 2.
 - ii. Includes a discussion of a subset of ideas requiring additional research before determining their status
 - iii. Table: Ideas requiring additional research
 - iv. Table: Ideas advancing to Stage 2 scoring
 - v. Table: Idea grouping for Stage 2 scoring
- c. Stage 2 Scoring
 - i. Presents the Stage 2 scoring process, the results of Stage 2 scoring, and notable findings during the scoring process
 - ii. Table: Stage 2 scores
- d. Portfolio Optimization
 - i. Summarizes the stage 2 ideas in terms of the portfolio characteristics
 - ii. Discusses and justifies the ranking changes made by the CalMTA team
 - iii. Table: CalMTA recommendation for ideas to advance to Phase 2
 - iv. Table: Ideas archived after Stage 2 scoring and portfolio optimization

VII. Recommendations (3-5 pages)

- a. Presents CalMTA recommendations on the ideas to advance to Phase 2 including:
 - i. "Batch 1" ideas and the schedule for advancing these to MTIs during 2024
 - ii. Recommendations for additional MTI ideas to further develop into Advancement Plans and the schedule for this development
 - iii. Appendices: Advancement Plans for each idea in Batch 1

VIII. MTAB Feedback (TBD after discussion at 11/30 MTAB meeting)

- a. Captures the feedback received by the MTAB on the CalMTA recommendations for MTI ideas to advance to Phase 2, the CalMTA response including the actions taken, and explanation of why no action was taken

IX. Appendices

- a. Scoring rubric and guidance
- b. RFI submission list, description, and disposition, including reasons for archiving
- c. List of organizations and briefings held
- d. Advancement Plans for first Batch