



October 13, 2023

Market Transformation  
Advisory Board (MTAB)  
Meeting





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# Welcome & Agenda

Margie Gardner

Vice President, Market Transformation

# Agenda



Time	Agenda Item	Presenter
9:00 a.m.	1. Welcome & Agenda	
9:05 a.m.	2. Introductions & Ice breaker	All
9:20 a.m.	3. Review Sept. 8 Meeting notes	Margie Gardner
9:25 a.m.	4. MTI Development Schedule	Margie Gardner
9:40 a.m.	5. RFI Disposition Report Outline	Jennifer Barnes
9:55 a.m.	6. Advancement Plan Template	Jeff Mitchell
10:10 a.m.	Break (20 min)	
10:30 a.m.	7. Overview of MTIs moving to Stage 2 Scoring & Proposed First Batch (Part 1)	Jeff Mitchell, Elaine Miller & Jennifer Barnes
12:00 p.m.	Lunch (45 min)	

Time	Agenda Item	Presenter
12:45 p.m.	7. Overview of MTIs moving to Stage 2 Scoring & Proposed First Batch (Part 1)	Jeff Mitchell, Elaine Miller & Jennifer Barnes
2:15 p.m.	Break (20 min)	
2:35 p.m.	8. Evaluation Framework	Karen Horkitz
3:35 p.m.	9. Public Comment	
3:50 p.m.	10. Next Meeting & Next Steps	Margie Gardner
4:00 p.m.	Adjourn	

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



# 2

## Introduction & Ice Breaker

Margie Gardner

Vice President, Market Transformation



# Ice Breaker



What's an item on your bucket list?



**September 8**

**MTAB Meeting Notes**



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



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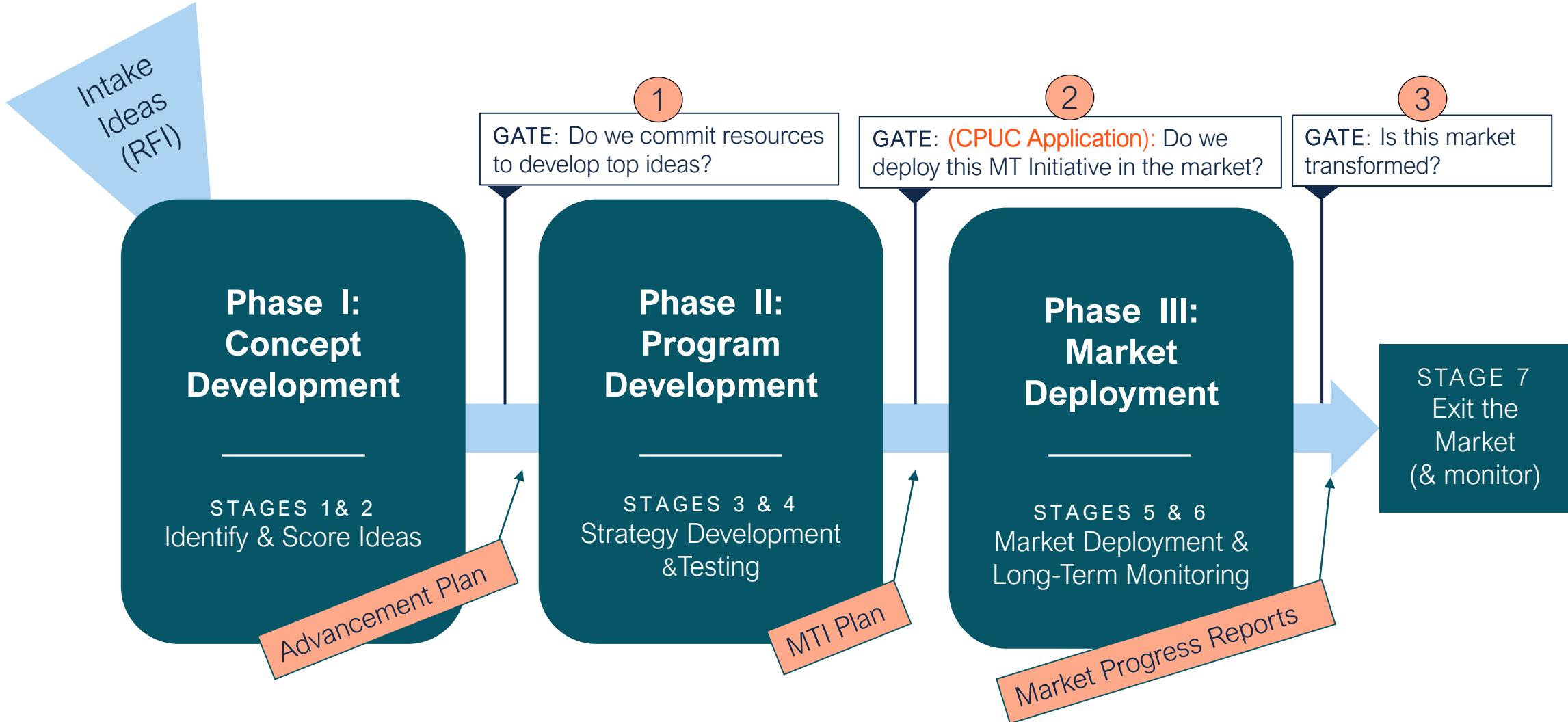
# MTI Development Schedule

Margie Gardner

Vice President, Market Transformation



# MTI Development / Deployment Process



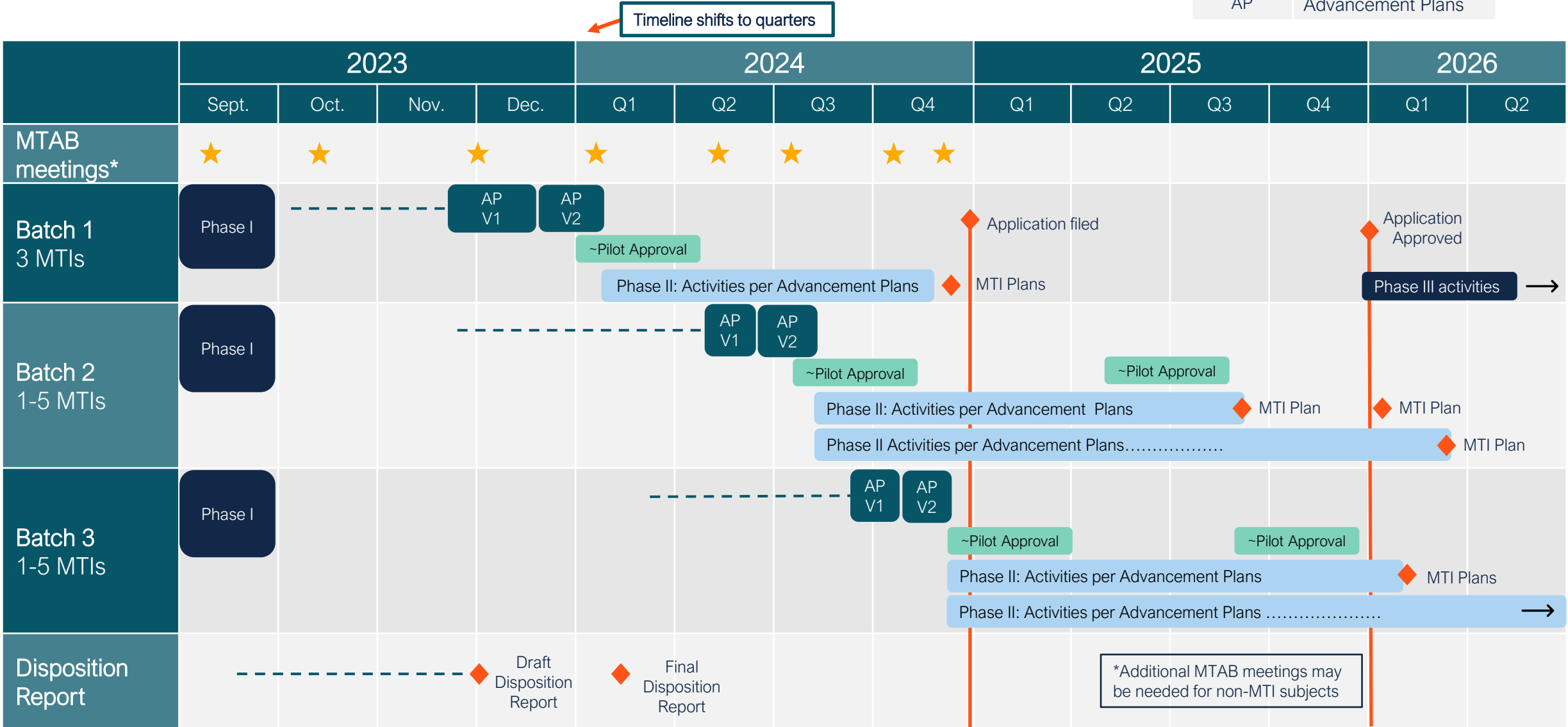




# Batch Approach to MTI Plan Development

(Illustrative)

★	MTAB meeting
◆	Milestone
- - -	Staff activity
AP	Advancement Plans



# 5 Disposition Report Outline

Jennifer Barnes

Contractor, 2050 Partners





# Disposition Report



Purpose: Report out to MTAB on Phase I activities. Documents:

- Intake process and results
- Rationale for proposed MTI advancement
- MTAB feedback and MTA response
- Planned Phase II activities (MTI Advancement Plans)





# Disposition Report Outline

## **Executive Summary (3 pages)**

- Provides a brief summary of the report

## **Introduction (1-2 pages)**

- Summarizes CalMTA background and development in California for context

## **Scoring Framework (7 pages)**

- Scoring Categories and Criteria
- Category and Criteria Weights
- Scoring Rubric
- Describes the scoring strategy, including the score options and points available for each criteria
- Portfolio Characteristics
- Discuss portfolio priorities that will be considered by the CalMTA team and how adjustments may be made in the rankings to fill deficiencies



# Disposition Report Outline

## Scoring Framework (7 pages)

- Scoring Categories and Criteria
- Category and Criteria Weights
- Scoring Rubric
  - Describes the scoring strategy, including the score options and points available for each criteria
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  - Discuss portfolio priorities that will be considered by the CalMTA team and how adjustments may be made in the rankings to fill deficiencies





# Disposition Report Outline

## **RFI Outreach (3 pages)**

- Key RFI Outreach Milestones
- CalMTA Outreach
- Submission Support
- Stakeholder Feedback on RFI

## **Summary of MTI Ideas Received (5 pages)**

- Summarizes the submissions received across metrics of interest



# Disposition Report Outline

## Submission Scoring (8-10 pages)

- Overview of Scoring Process
  - Summarizes the scoring process from threshold review to portfolio optimization
  - Identifies the set of ideas that did not pass the threshold criteria and reasons why
- Stage 1 Scoring
  - Describes the Stage 1 scoring process, the scoring results, and the ideas advancing to Stage 2
- Stage 2 Scoring
  - Presents the Stage 2 scoring process, the results of Stage 2 scoring, and notable findings during the scoring process
- Portfolio Optimization
  - Summarizes the Stage 2 ideas in terms of portfolio characteristics



# Disposition Report Outline

## Recommendations (3-5 pages)

- Presents CalMTA recommendations on the ideas to advance to Phase II including:
  - “Batch 1” ideas and the schedule for advancing these to MTIs during 2024
  - Recommendations for additional MTI ideas to further develop into Advancement Plans and the schedule for this development
  - Appendices: Advancement Plans for each idea in Batch 1

## MTAB Feedback

- Captures the feedback received by the MTAB on the CalMTA recommendations

## Appendices

- Scoring rubric and guidance
- RFI submission list, description, and disposition, including reasons for archiving
- List of organizations and briefings held
- Advancement Plans for Batch 1



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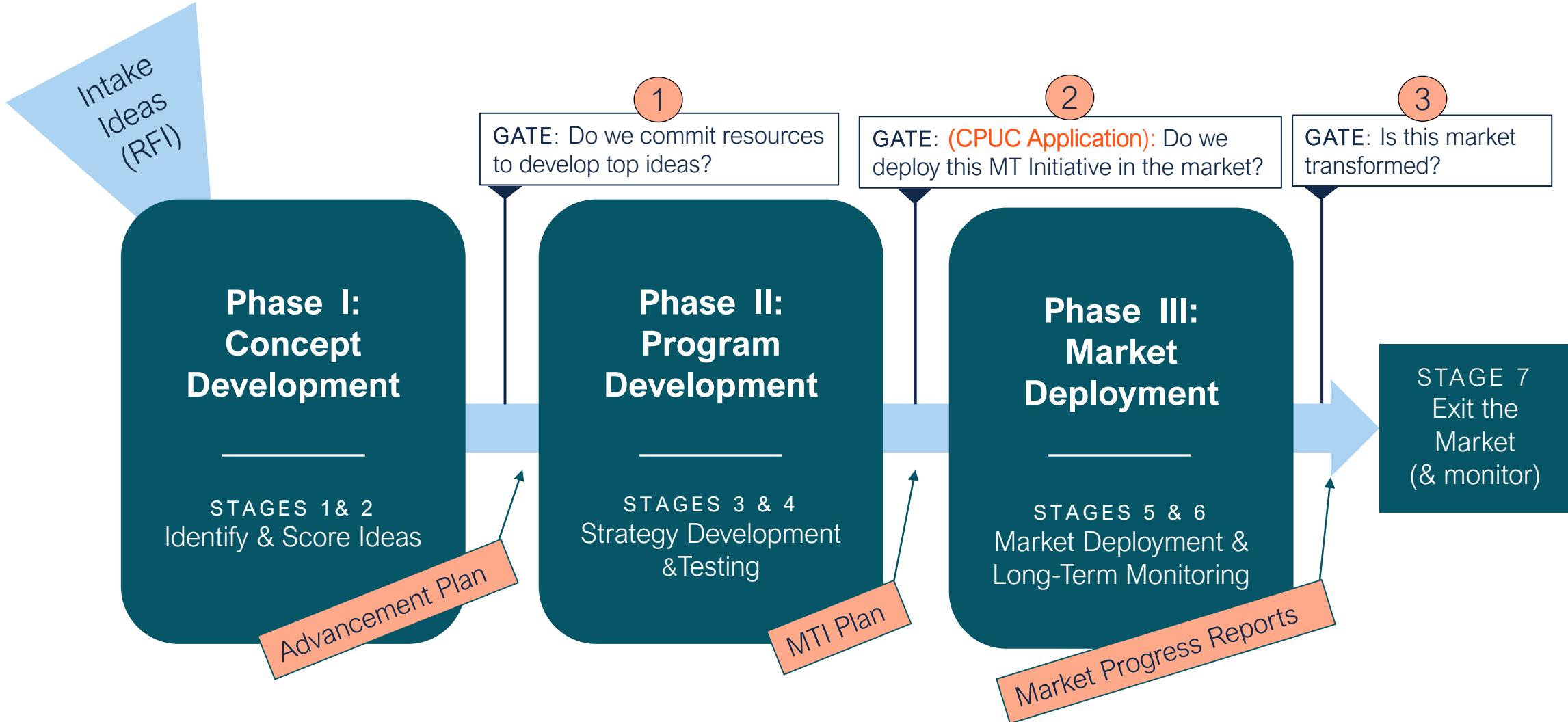
# Advancement Plan Template

Jeff Mitchell

Principal of MTI Development, Market Transformation



# MTI Development / Deployment Process



# MTI Development Process Phase II Goals



Complete market research  
and testing as needed

Finalize MT theory  
and program strategy

**Output: MTI Plans  
delivered  
to CPUC for approval**

Develop evaluation plans and data  
inputs

Consult with CA market and  
technology specific experts



# MTI Advancement Plan Components



- Refined logic model with Market Progress Indicators (MPIs)
- Updated adoption forecasts and MTI savings potential
- Draft MTI plan

# MTI Advancement Plan Template Discussion



- Any gaps in the document's content?
- Where would you like to see more detail? Less detail?
- Any overall concerns?

**20 minute break**  
**We will be back soon.**



# 7

## Overview of MTIs moving to Stage 2 Scoring & Proposed First Batch (Part 1)

Jeff Mitchell | Principal of MTI Development, Market Transformation

Elaine Miller | Senior Manager, Market Transformation Strategy

Jennifer Barnes | Contractor, 2050 Partners







## Stage 2: Score, Develop, Assess

- Estimate Unit Impacts (energy savings, grid impacts, GHG reductions)
- Develop preliminary baseline market adoption and total market adoption estimates
- Conduct an external program review
- Draft a preliminary product definition and MT theory

### Phase I: Concept Development

#### STAGE 1

Scan & Identify Ideas

#### STAGE 2

Develop & Assess Ideas

# MTI Submissions in the Envelope Category



Program Name	Idea #
Commercial Windows	
Single Pane Retrofit	0157
Vacuum Insulated Glass (VIG)	0079
Residential Windows	
High Performance Windows	0010

# MTI Submissions in the HVAC Category (1)



Program Name	Idea #
Portable/Window Heat Pumps	
Portable Heat Pumps	0097
Micro Heat Pumps	0086
Cold Climate Window and Portable Heat Pumps	0125
Combination HVAC and Water Heating	
Multifunction Heat Pumps	0085
Combination Heating, Cooling, Water Heat	0126
Residential Heating Cooling and Air Conditioning (HVAC)	
Residential Variable Speed Heat Pump	0171
Heating Cooling and Air Conditioning (HVAC) Integrated Ventilation	
Heat Pump Integrated Continuous Mechanical Ventilation	0081

# MTI Submissions in the HVAC Category (2)



Program Name	Idea #
Heating Cooling and Air Conditioning (HVAC) Policy	
Policy Requiring all Air Conditioning be sold as Heat Pumps	0068
Commercial Efficient Rooftop Units (ERTUs)	
Efficient Commercial Rooftop HVAC (ERTUs)	0116
Unitary Packaged Heat Pump Systems for Light Commercial	0166
Advanced Rooftop Controls (ARC)	0124
Advancing Smarter HVAC Controls in Small to Medium Commercial	0184
Medium to Large Commercial Control Systems	
Modernizing Building Automation System Hardware	0149



# MTI Submissions in the Lighting Category



Program Name	Idea #
Streetlighting	
Efficient Streetlighting	0105
Networked Lighting Controls	
Luminaire Level Lighting Controls	0120
Procure Networked Lighting Controls for Multivendor Teams	0128

# MTI Submissions in the PLA Category



Program Name	Idea #
Smart Home	
Smart Electric Panel	0080
Residential Electric Vehicle Charging	
Bi-directional Electric Vehicle Charging - Residential	0021
Electric Vehicle Supply Equipment (EVSE) Standards Roadmap	0175
Commercial Electric Vehicle Charging	
Bi-directional Electric Vehicle Charging - Fleet	0077
Residential Appliances	
Induction Ranges and Cooktops	0107
Leveraging ENERGY STAR Retail Product Platform (ESRPP) for Equity	0115

# MTI Submissions in the Practices Category



Program Name	Idea #
Building Performance Standards	
Building Performance Standards Accelerator	0193
Workforce Development	
Work-based Learning to Achieve Equitable Climate Cool Schools	0146

# MTI Submissions in the Process Category



Program Name	Idea #
Foodservice	
Foodservice Decarbonization	0165
Induction Cooking Training Partnership	0174
Elevating Food Service Technology Transformation	0183



# MTI Submissions in the WH Category (1)



Program Name	Idea #
Residential Water Heating	
Heat Pump Water Heater Exterior Enclosure	0145
Heat Pump Water Heater Installer Certification	0136
Heat Pump Water Heater Rapid Installer Expansion	0177
Deployment of 120V Heat Pump Water Heaters	0180
Market Connections for Plug-in Heat Pump Water Heaters	0148
Gas Water Heater Buyback Program + Solar	0132
Eco-Tech Apprenticeship Program	0153

# MTI Submissions in the WH Category (2)



Program Name	Idea #
Commercial Water Heating	
Heat Pump Water Heaters for Multifamily	0078
Central Heat Pump Water Heater for Multi-Family-Complete Kit Solutions	0113
Load Flexibility Controls for Heat Pump Water Heater Systems	0179
Ultra-low Global Warming Potential (GWP) Packaged Systems w/Thermal Energy Storage (TEC)	0108

# Held for further development (1)



Program Name	Idea #
Commercial Hydronic Systems Conversion to On-Demand Domestic Hot Water	0154
Efficient Fans Leveraging Fan Energy Index (FEI)	0111
Smart Homes	0022
Reflective Insulation for Windows	0188
High Efficiency Factory Homes	0106
Smart Pumps	0110
Scaling Passive House	0173
Adjustable Speed Drives Leveraging the Power Index	0112
Remote Pump Monitor	0121

# Held for further development (2)



Program Name	Idea #
Thermal Energy Storage as a Distributed Energy Resource	0133
Very High Efficiency Dedicated Outdoor Air Systems (DOAS)	0118
Sustainable Refrigeration Transition	0137
Condenser Coil Cleaning of Commercial Refrigeration Units	0101



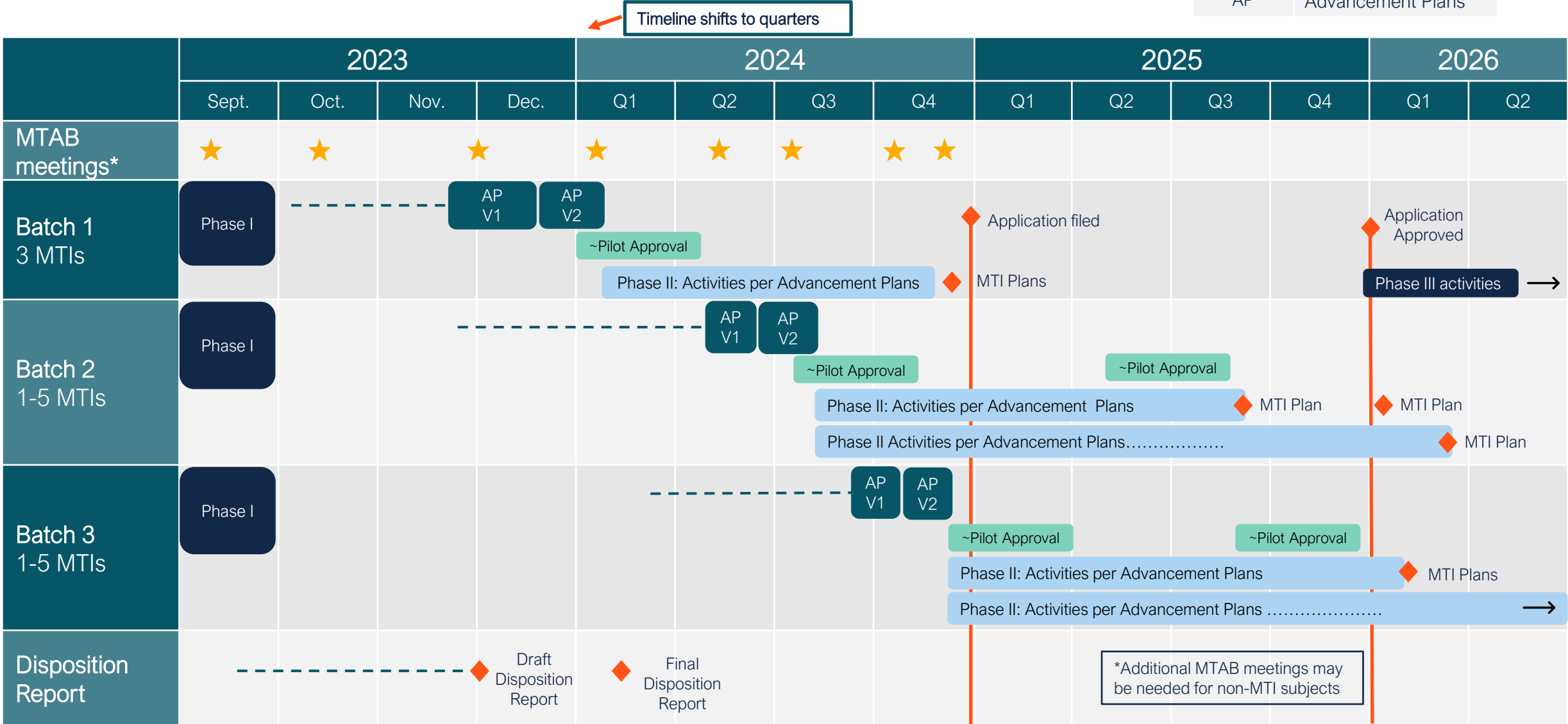
# Front Runner Criteria for Batch 1

- Have a well-defined product definition, MT theory, program logic and leverage points
- Required research and pilots can be completed in a short timeframe
- Clear role for CalMTA
- High likelihood of an MTI Plan being finalized by 12/24
  - MTI Plans needed by 12/2024 based on Decision timeline
    - Need CPUC approved Application before 12/2025 to access budget 1/2026 (approval may take up to 1 year)
    - Start up money stops 12/2025



# Batch Approach to MTI Plan Development (Illustrative)

★	MTAB meeting
◆	Milestone
- - -	Staff activity
AP	Advancement Plans





## Portable / Window Heat Pumps

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

# Portable / Window Heat Pumps



## *Preliminary product definition*

Portable and window heat pumps (aka micro heat pumps) are affordable, self-contained consumer products that provide efficient heating and cooling for small spaces ranging from a single room to a whole apartment. They are similar in shape and size to typical window and portable AC products.

- Installed 110 Volt
- Cooling capacity < 18,000 BTU
- Provide efficient heat @ 40F
- Utilize inverter technology

### Future functionality

- Air filtration
- Grid connection
- Cold climate capable

Portfolio Priorities	
<input checked="" type="checkbox"/>	Equity
<input type="checkbox"/>	WE&T
<input checked="" type="checkbox"/>	Energy Savings
<input type="checkbox"/>	Grid Benefits
<input checked="" type="checkbox"/>	GHG Reductions



# Portable / Window Heat Pumps Preliminary MT Theory



## Problem

- Target market suffers higher energy burdens and greater exposure to poor air quality
- Need an affordable electric alternative to resistance and gas space heat while also providing air conditioning and air filtration
- Market actors purchase inefficient space heaters and window A/C units to supplement HVAC needs and buy separate air filtration products during poor outdoor air quality events

## Opportunity

- Portable and window heat pumps products are available
- Can be self installed
- Some include air filtration and grid-interactive capability

# Portable / Window Heat Pumps Preliminary MT Theory



## Barriers

- Product category availability
- Higher cost
- Lack of awareness
- No efficient product differentiation
- Insufficient models that include air filtration or are grid enabled



## Priority Activity

- Influence product development through manufacturer engagement
- Specification development with aligned regions
- ENERGY STAR and DOE engagement
- Partner with retail platforms to stock and market
- Partner with existing programs (weatherization & air quality)



## Outcomes

- National scale will influence retail stocking practices, build product awareness and efficient product differentiation with the ultimate impact of influencing voluntary and federal standards

# Discussion Questions



- What excites you about this MTI?
- Any concerns?
- Any existing research/programs we should investigate?
- What do you know about this market that would change/enhance our recommendation?

**Lunch break (45 min)**  
**We will be back soon.**



# 7

## Overview of MTIs moving to Stage 2 Scoring & Proposed First Batch (Part 2)

Jeff Mitchell | Principal of MTI Development, Market Transformation

Elaine Miller | Senior Manager, Market Transformation Strategy

Jennifer Barnes | Contractor, 2050 Partners







# Induction Ranges and Cooktops

# Induction Cooking



## *Preliminary Product Definition*

- Induction ranges and cooktops use electromagnetic induction to heat cookware directly.
- When power is turned on, an electric current flows through copper heating coils positioned under a flat glass or ceramic surface.
- This creates a magnetic field that activates the iron particles in the cast iron or stainless-steel cookware that sits on the surface directly above the coil.
- Saving energy through instant, direct, and efficient heat transfer, and precise temperature control.

Portfolio Priorities	
<input checked="" type="checkbox"/>	Equity
<input type="checkbox"/>	WE&T
<input checked="" type="checkbox"/>	Energy Savings
<input type="checkbox"/>	Grid Benefits
<input checked="" type="checkbox"/>	GHG Reductions

# Induction Cooktop Preliminary MT Theory



## Problem

- In California, gas ranges have over 70% market share in single and multifamily households
- When consumers choose electric, there needs to be efficient induction options at all price points



## Opportunity

- Induction cooking is available from all major manufacturers
- IRA program funding
- Current programs targeting limited income multifamily and small residential
- Limited adoption of < 2% of households
- ENERGY STAR has released the Residential Cooking Products V1.0 specification

# Induction Cooktop Preliminary MT Theory



## Barriers

- Induction products are priced at a 'premium' product
- Availability at retail is limited
- Perceived as inferior to natural gas appliances
- Potential limitations with panel capacity



## Priority Activity

- Engage manufacturers to develop lower priced models
- Drive product availability and awareness through retail partnerships
- Build awareness and market share for ENERGY STAR v1.0



## Outcomes

- Awareness and acceptance increases among consumers triggering broader electrification
- ENERGY STAR labeled products are available and have strong market share
- More affordable models are available
- Induction becomes the first choice for electric ranges and cooktops

# Discussion Questions



- What excites you about this MTI?
- Any concerns?
- Any existing research/programs we should investigate?
- What do you know about this market that would change/enhance our recommendation?







## Efficient Rooftop Units (ERTU)

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

# Efficient Commercial Rooftop HVAC (ERTUs)



## *Preliminary Product Definition*

Roof Top Units (RTU) are forced-air systems that package the evaporator, condenser coils, fans, and heating components into a single unit to serve a building's heating, cooling, and ventilation needs.

The energy savings components that enable this system to save energy may include:

- Insulated RTU box (to R-12)
- Low leakage dampers
- Increase heat pump efficiency
- Use of energy or heat recovery (E/HRV)

Portfolio Priorities	
<input checked="" type="checkbox"/>	Equity
<input checked="" type="checkbox"/>	WE&T
<input checked="" type="checkbox"/>	Energy Savings
<input checked="" type="checkbox"/>	Grid Benefits
<input checked="" type="checkbox"/>	GHG Reductions

# ERTU Preliminary MT Theory



## Problem

- ~25% of commercial buildings in California use RTUs for HVAC
- Manufacturers currently lack business case to optimize efficiency
- Uptake of efficient ERTUs very slow

## Opportunity

- Efficiencies addressing features such as shell improvements can be captured using the new CSA P.8:22 rating
- Leverage a market collaborative that includes NEEA, MNCEE, and Nicor for increased scale
- The Consortium for Energy Efficiency (CEE) is developing a specification to include heat pump RTUs

# ERTU Preliminary MT Theory



## Barriers

- Efficient features only available in 'premium' products
- Supply chain currently lacks business case for improved efficiency
- No mechanism to differentiate efficient products
- Costs



## Priority Activity

- Engage manufactures on product development
- Partner with CEE to ensure HP specification is appropriate for CA climates
- Partner closely with Codes & Standards and CA programs
- Leverage voluntary federal standards to achieve product differentiation



## Outcomes

- Code requires most efficient ERTUs + advanced controls for new construction
- Owners of existing buildings value most efficient ERTUs and their installation becomes best practice as retrofit



# Discussion Questions



- What excites you about this MTI?
- Any concerns?
- Any existing research/programs we should investigate?
- What do you know about this market that would change/enhance our recommendation?

**20 min break**  
**We will be back soon.**





# 8

## MTI Evaluation Framework

Karen Horkitz

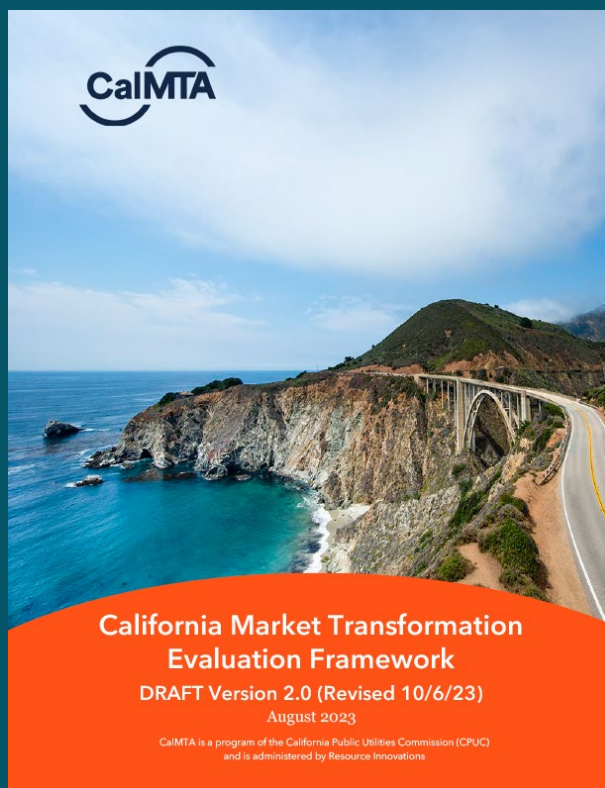
Senior Advisor, Market Transformation





# Agenda Topics

- Stakeholder outreach and feedback
- MTI Attribution/Incremental Impact
  - MTIs and resource programs
  - MTIs and Codes & Standards program
- Guidelines for revising baseline market adoption
- Outreach and finalization timeline



# Outreach activities to date



## Presentations/Discussions

- CPUC staff
- MTAB (September 8 meeting)
- EE Directors work group
- Codes and Standards work group

## Takeaways

- Need clear guidelines for BMA revision
- Recommended approach attribution/incremental impact needs clarification
- Concerns about “Co-created” impacts and cost-effectiveness

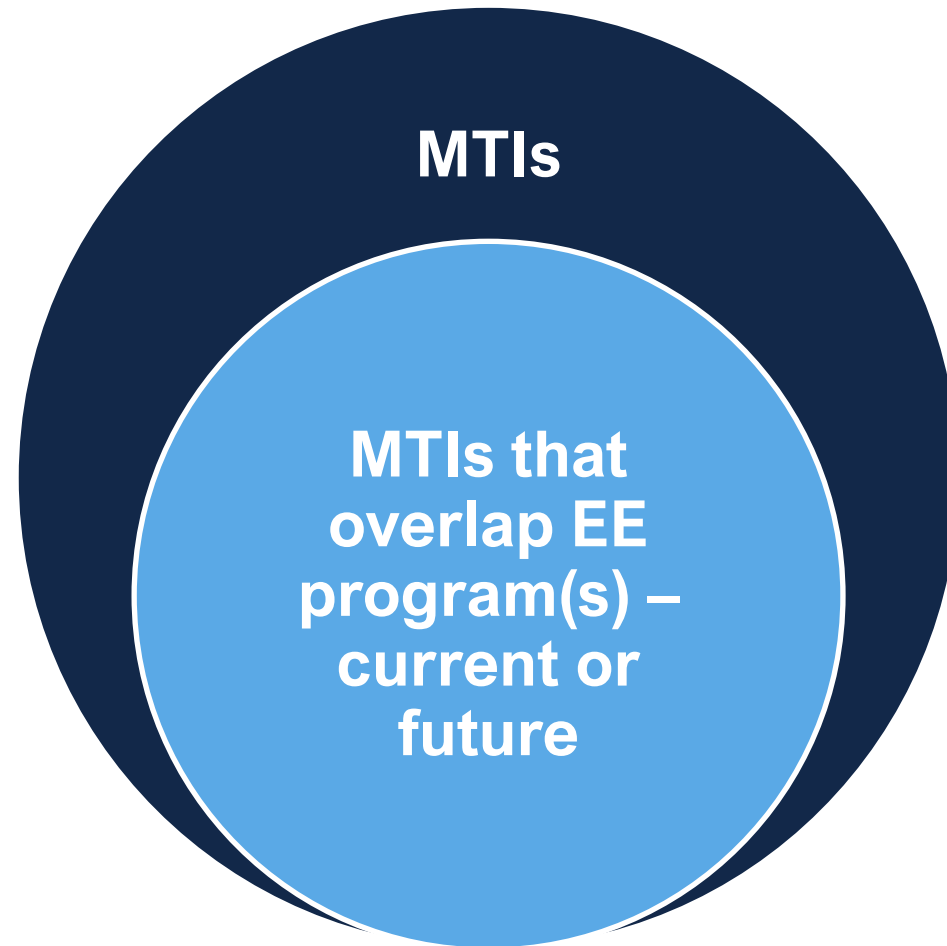
# MTI Attribution/Incremental Impact



**MTIs and Resource Programs**

**MTIs and Codes & Standards Program**

# A subset of MTIs may target the same market and measures as resource programs



# CAEECC MTWG Phase 2 Report considered two options



Considered two options to avoid double-counting of savings from MTIs and resource acquisition programs

- **Option A.** Subtract Verified Resource Acquisition Savings from Net MTI Savings
- **Option B.** An independent review committee (IRC) should conduct a technical review of the proposed methodology for distinguishing market effects included in the MTI plan; it is premature to make a blanket decision on how to remove other program savings without knowing the nature of the MTI, the purpose of the calculation, and other information

**Working group members were unable to reach consensus**

CAEECC-Hosted Market Transformation Working Group – Phase II

Report and Recommendations to the California Public Utilities Commission

**FINAL REPORT**  
February 1, 2021



# Recommended MTI and Resource Program Attribution Approach

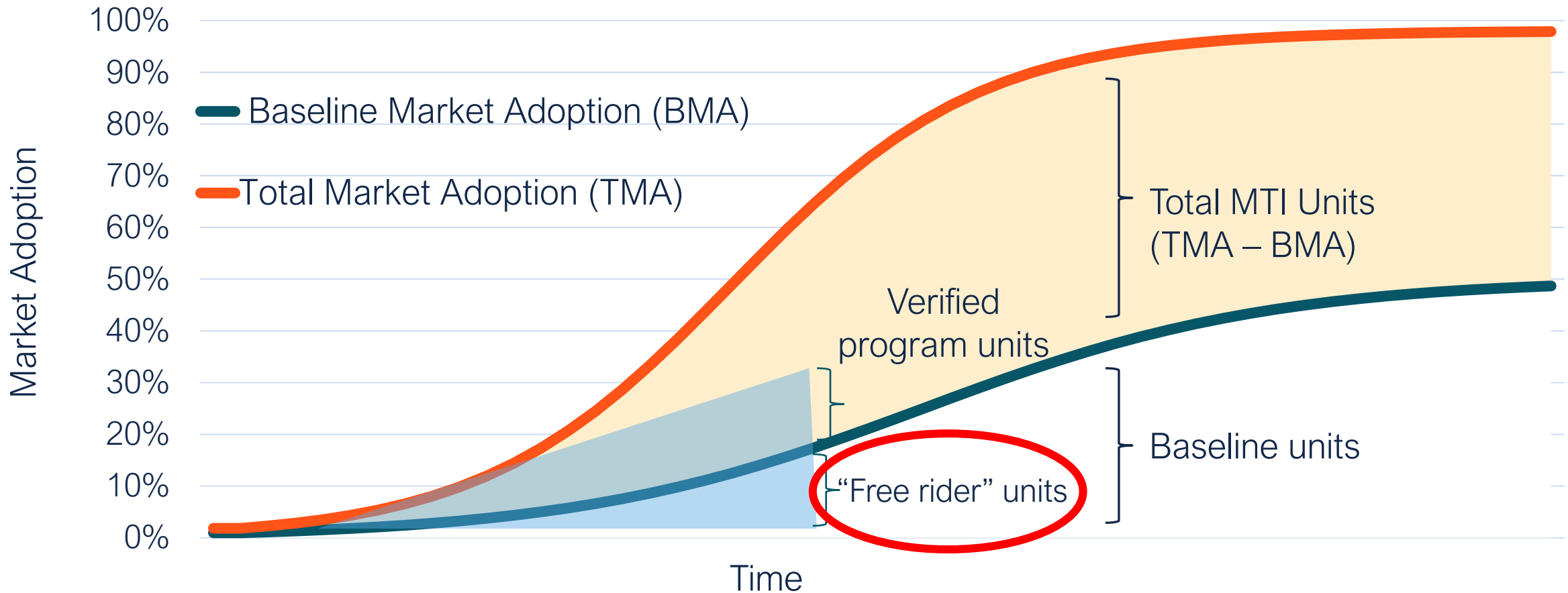


**When MTIs and resource programs target the same markets**

- **Subtract verified resource program impacts from Total MTI Impacts to avoid double counting**
  - This is MTWG Option A
  - There is no change to evaluated or reported savings for resource programs
  - Net MTI Impacts = **[(TMA – BMA) \* EUI] – verified resource program savings**
  - Use these long-term “MTI net impacts” to assess MTI cost-effectiveness
  
- **Also report Total MTI Impacts for collaborative MTIs, to understand collective impact**
  - Total MTI Impacts = **(TMA – BMA) \* UEI**
  - “Collaborative” MTIs are those for which resource programs and MTIs are coordinating and market influence is intertwined (per evaluation)
  - These “co-created impacts” can be used with combined program costs to assess MTI cost-effectiveness<sup>a</sup>

<sup>a</sup>This is the approach the northwest region uses to assess NEEA MTIs

# Market transformation savings opportunity



# Illustrative MTI Example



## Ductless Heat Pump MTI Highlights

- Barriers: availability; trained installers; contractor business model; consumer awareness/demand; price
- No deemed savings or workpaper; no utility programs when MTI began
- MTI interventions included:
  - working with manufacturers to get NW distribution
  - Master Installer program to train and develop installer capacity
  - Market coordination with utilities/programs
  - Development of utility marketing toolkit

## Example Performance Reporting (Illustration)

Metric	Energy Savings (MWh)	Notes
Total MTI Savings (“co-created” impacts)	10,000	(TMA – BMA) * Unit Energy Impacts (UEI)
Verified Resource Program Savings	6,000	Total units * UEI * NTG ratio  Utility program performance unaffected by MTI
MTI Savings net of resource programs	4,000	(TMA – BMA) * UEI – Verified resource program savings

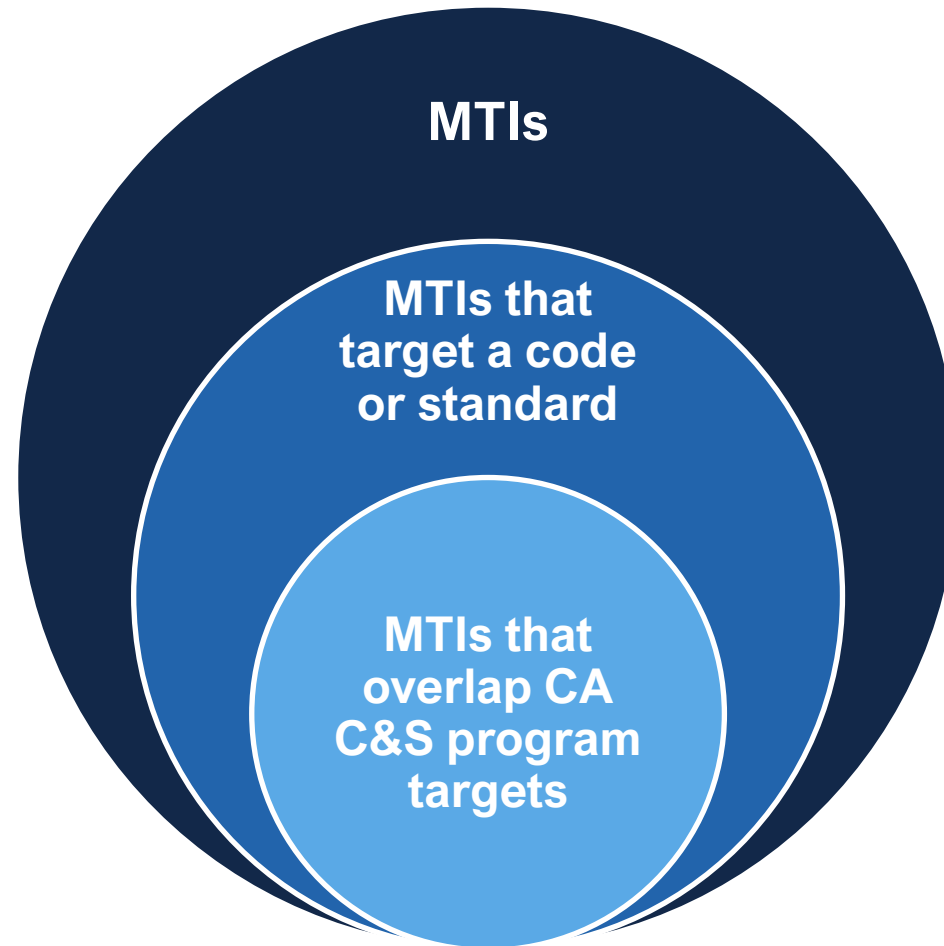
# Evaluation Framework Attribution Topics



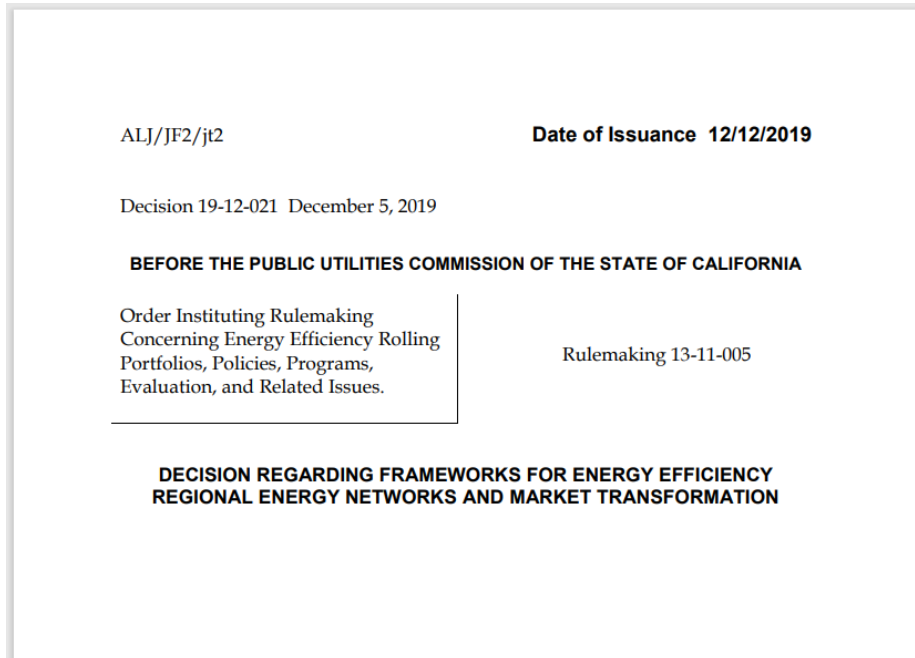
**MTIs and Resource Programs**

**MTIs and Codes & Standards Program**

# A subset of MTIs may target codes or standards that overlap with the C&S program



# Decision Guidance on Savings from Codes and Standards



- CalMTA investments must deliver incremental benefits; MTIs must demonstrably increase and/or accelerate market adoption beyond what it would have been absent the market transformation initiative (MTI)
- CalMTA to create forecast of MTI savings
- Savings included for MTIs that are proposed to lead to a code or standard
- CAEECC Market Transformation Working Group (MTWG) should reconvene to address coordination and attribution issues for overlapping programs
- ***MTI shall count annual savings 3X the level in the year prior to C/S adoption***



# CAEECC MTWG Phase 2 Report (1)



## Consensus Recommendations

- There should be close cooperation and collaboration between the MTA and C&S teams
- In addition to the initial planning forecast of total MTI/C&S savings, the MTA should also forecast, in collaboration with the Codes and Standards program administrator, savings for individual MTIs separate from savings achieved by the Codes and Standards program administrator, which will *de facto* result in relative forecasted shares
- Do **not** pre-allocate savings to MTIs and the Codes and Standards program for the C&S to which they both contributed

CAEECC-Hosted Market  
Transformation Working Group –  
Phase II

Report and Recommendations to the  
California Public Utilities Commission

**FINAL REPORT**  
February 1, 2021

# CAEECC MTWG Phase 2 Report (2)



CAEECC-Hosted Market  
Transformation Working Group –  
Phase II

Report and Recommendations to the  
California Public Utilities Commission

**FINAL REPORT**  
February 1, 2021

## No Consensus

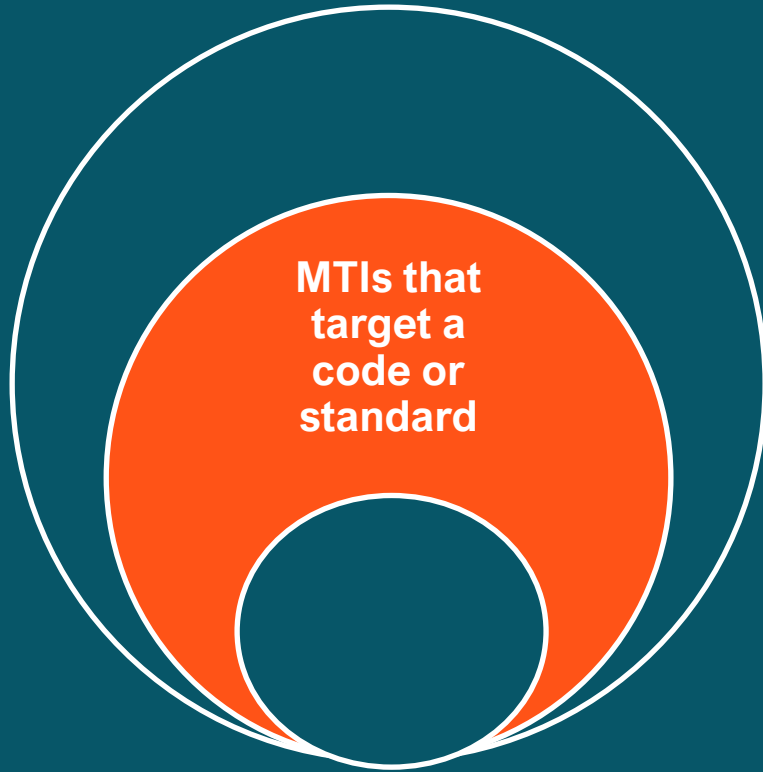
- Addition of MTI-related attribution factors to the existing C&S program evaluation protocol
- Adjustment to the weighting of attribution factors in the existing C&S program evaluation protocol

# Evaluation Framework Recommendation

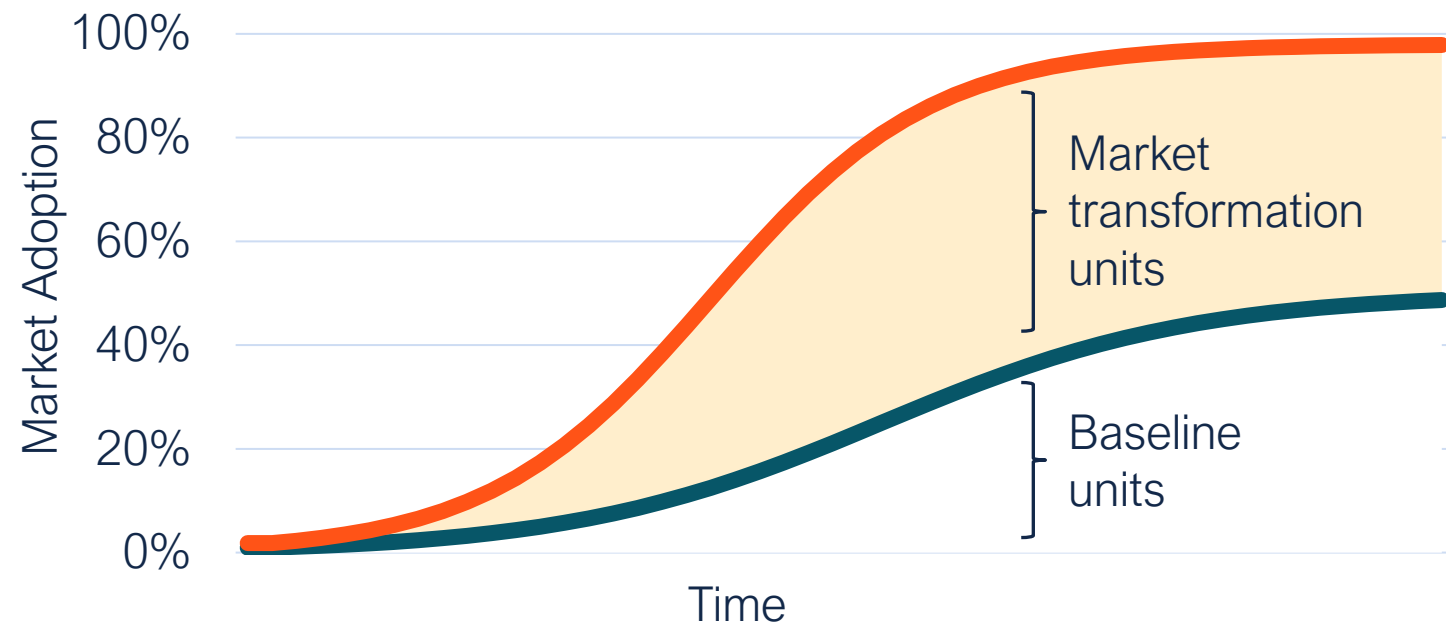


- Collaborative forecasting per MTWG Phase II Report recommendation:
  - C&S program forecast – without the MTI
  - Forecast with the MTI – how does it compare?
    - Accelerated timing → incremental impact
    - More stringent code or standard possible → incremental impact
    - No differences → no incremental impact → MTI may be unnecessary
- Collaborative forecasting developed during Phase II of MTI Lifecycle
- Forecasts trued up based on C&S program evaluation

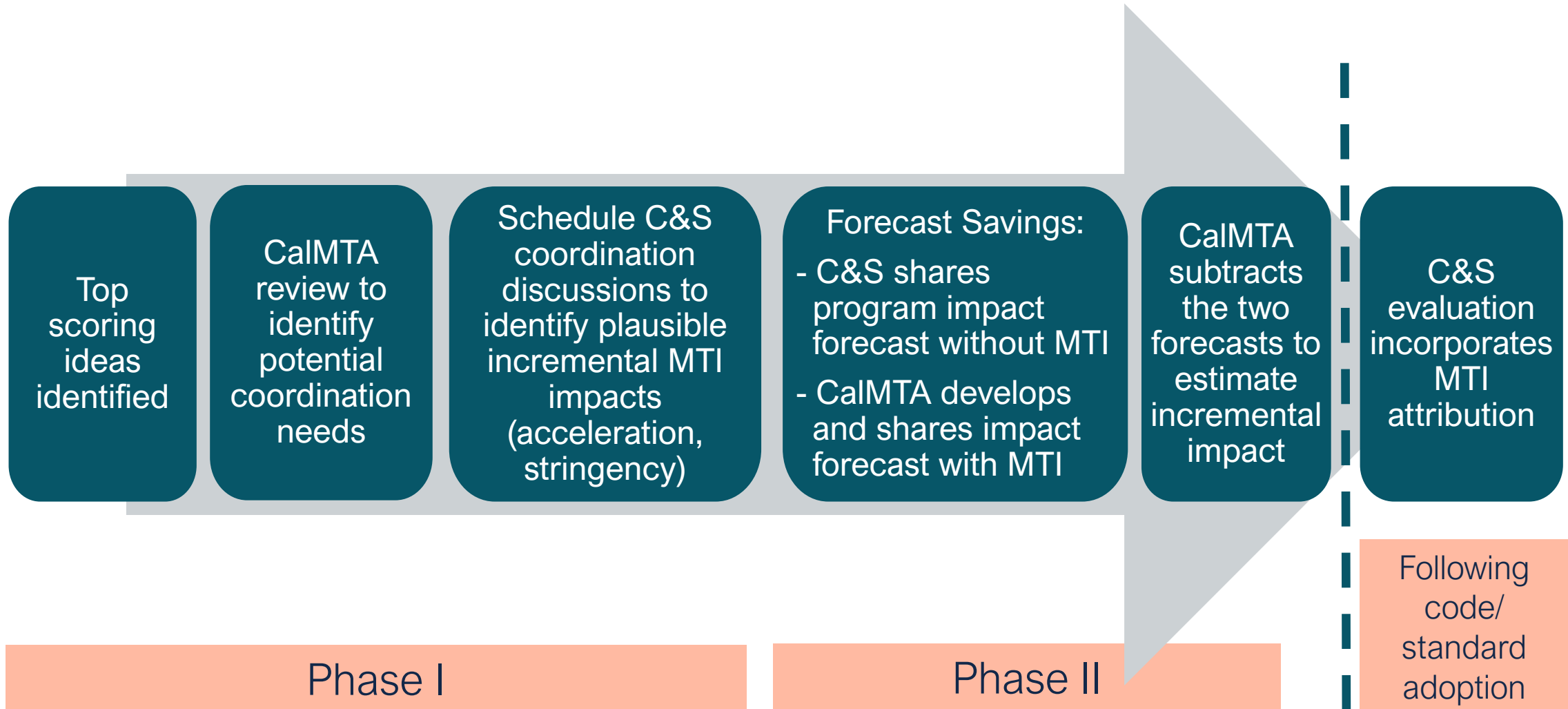
# Evaluation Framework Recommendation



- Use standard MTI impact forecasting approach:  
(Total Market Adoption – Baseline Market Adoption) \* UEI
- Include anticipated codes and standards in baseline



# How it might work - process



# BMA Revision Guidelines



## Scenarios

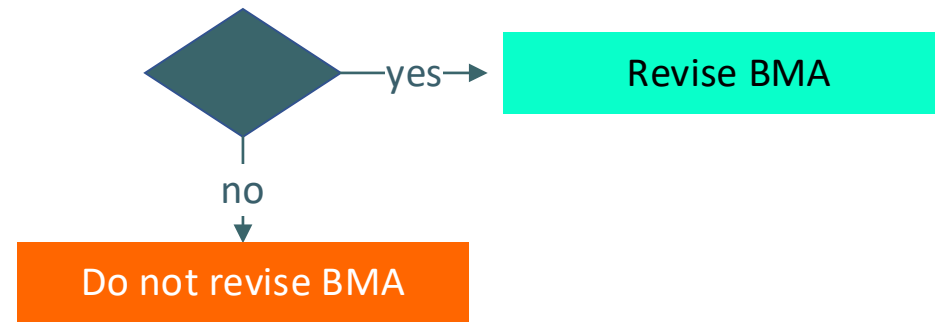
Incorrect BMA Assumption Discovered

Unanticipated Exogenous Event Occurs

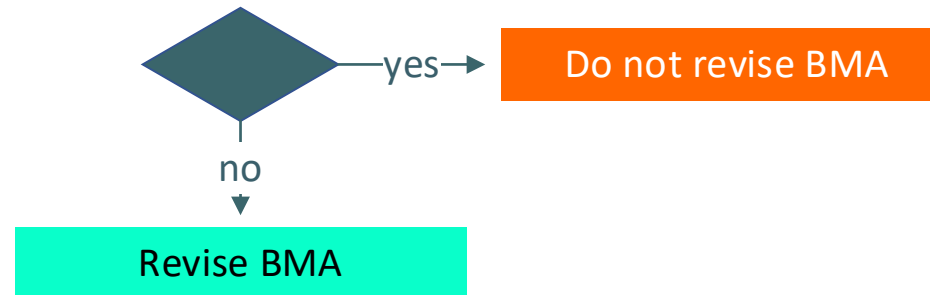
Unanticipated Product/Technology Advancement

## Guidelines

1. **Materiality:** *Would the revision have a material impact?*



2. **Causality:** *Possible the MTI significantly contributed to the observed change?*





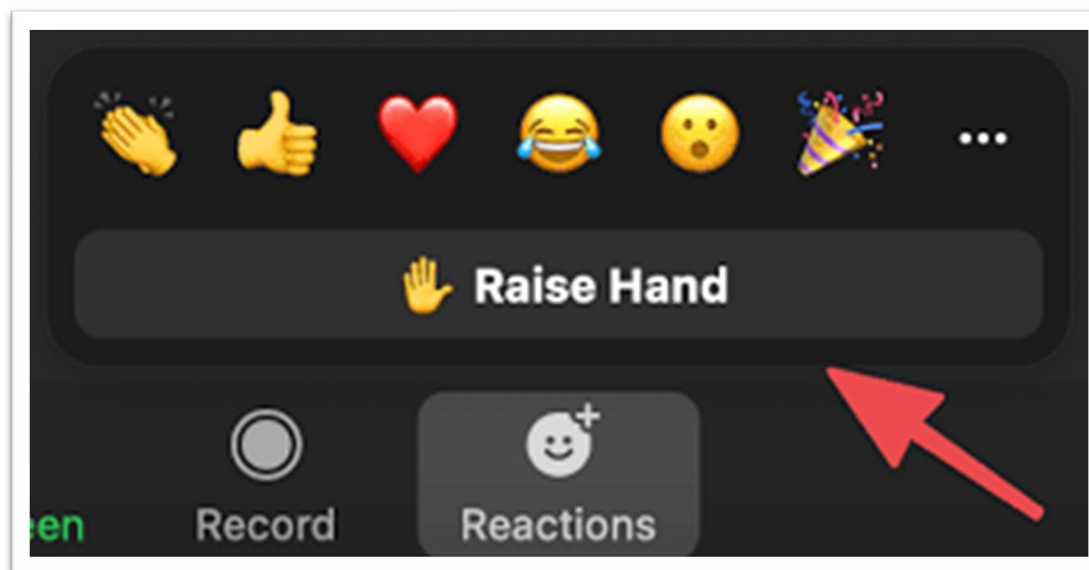
# Evaluation Framework Finalization Timeline

★	MTAB Meeting
◆	Milestone

	2023			
	Sept.	Oct.	Nov.	Dec.
MTAB meetings	★	★		★
Evaluation Framework	◆ Draft Evaluation Framework: MTAB Discussion	◆ MTAB Framework Update and Discussion ◆ Stakeholder Q&A Webinar	◆ Stakeholder Outreach	◆ Final Draft Evaluation Framework: MTAB Discussion ◆ Final Evaluation Framework
		◆ Public Comment		

# Public Comment

Raise your hand using the “Reactions” feature and we will allow you to unmute yourself.



# 10

## Next Meeting & Next Steps

Margie Gardner

Vice President, Market Transformation



# Upcoming MTAB Meetings



Meeting Date	Format	Key Topics
Thursday, Nov. 30 Noon-5 pm & Friday, Dec. 1 9 am - 3 pm	In-person Irwindale, CA	<ul style="list-style-type: none"><li>• Draft RFI Disposition Report</li><li>• Draft Advancement Plans for 3 MTIs (Batch 1)</li><li>• Final Draft Evaluation Framework</li></ul>
Thursday, January 25 9 am – 5 pm	In-person SF or LA area	<ul style="list-style-type: none"><li>• Final RFI Disposition Report</li><li>• 3 Final Draft Advancement Plans (Batch 1)</li><li>• 2024 Operations Plan</li><li>• MTAB term renewals and selection process</li></ul>



**Thank you for attending!**  
**See upcoming meetings & events at**  
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