

Application No.: 24-12-XXX (CalMTA)

Exhibit No.: MTA-10

Witnesses: Various

Commissioner:

ALJ:

**CALIFORNIA MARKET TRANSFORMATION ADMINISTRATOR
STATEMENT OF QUALIFICATIONS**

Application 24-12-XXX
California Market Transformation Administrator (CalMTA)

December 20, 2024

1
2
3
4
5

EXHIBIT MTA-10
STATEMENT OF QUALIFICATIONS

TABLE OF CONTENTS

Attester	Page
Lynette Curthoys	1
Stacey Hobart	4
Karen Horkitz	7
Jeff Mitchell	10
Ralph Prahl	13
Nils Strindberg	17

1 **STATEMENT OF QUALIFICATIONS OF LYNETTE CURTHOYS**

2
3 Q. 1. *Please state your name and business address.*

4
5 A. 1. My name is Lynette Curthoys. My business address is: 719 Main Street, Suite A
6 Half Moon Bay, California 94019.

7
8 Q. 2. *Briefly describe your current role and responsibilities at Resource Innovations.*

9
10 A. 2. I am the Vice President of Market Transformation charged with leading the
11 CalMTA program. In this role, I have dedicated my efforts to ensuring that the
12 entire process for soliciting, receiving, and selecting Market Transformation
13 Initiatives (MTI) proposals by CalMTA and the Market Transformation Advisory
14 Board (MTAB) has been conducted fairly by appropriately qualified staff in full
15 compliance with Commission directives—both those specific to D.19-12-021 and
16 those resulting from continuous communication and collaboration with the
17 California Public Utilities Commission’s (CPUC’s) Energy Division.

18
19 Q. 3. *Please describe your relevant educational and professional background.*

20
21 A. 3. I graduated with honors from Stanford University with a Bachelor of Arts in
22 Human Biology with an emphasis on environmental communications and
23 behavior change. I have been a consultant in the energy industry for over 30
24 years, helping utilities navigate environmental laws and stakeholder engagement
25 to reinforce the electric transmission grid, interconnect renewables, develop
26 energy storage facilities, manage climate-change risks, and deploy demand-side
27 management solutions. In this capacity, I have supported over a dozen
28 applications before the CPUC for utility clients.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28

Q. 4. *Have you previously testified before the California Public Utilities Commission?*

A. 4. No, I have not.

Q. 5. *What exhibits are you sponsoring?*

A. 5. I am sponsoring CalMTA's testimony on the following:

- Exhibit MTA-01: Executive Summary
- Exhibit MTA-02: Description and Merits of the Proposed Market Transformation Initiatives
- Exhibit MTA-03: CalMTA Five-Year Implementation Budget

Q. 6. *Was your testimony prepared by you or under your supervision?*

A. 6. Yes, it was.

Q. 7. *Are the statements made in your testimony true and correct to the best of your knowledge and belief?*

A. 7. Yes, they are.

Q. 8. *To the extent that your testimony contains expressions of opinion, do they represent your best professional judgment?*

A. 8. Yes, they do.

Q. 9. *Does this conclude your statement of qualifications?*

1

2 A. 9. Yes, it does.

1 **STATEMENT OF QUALIFICATIONS OF STACEY HOBART**

2

3 Q. 1. *Please state your name and business address.*

4

5 A. 1. My name is Stacey Hobart. My business address is: 719 Main Street, Suite A
6 Half Moon Bay, California 94019.

7

8 Q. 2. *Briefly describe your current role and responsibilities at Resource Innovations.*

9

10 A. 2. As Principal of Stakeholder Engagement and Communications, I am responsible
11 for ensuring that CalMTA stakeholders and other interested parties are aware of
12 our work and the value market transformation brings to the California energy
13 efficiency landscape. My team manages our external-facing communications as
14 well as supports the MTI development team in planning and execution of
15 marketing and outreach strategies.

16

17 Q. 3. *Please describe your relevant educational and professional background.*

18

19 A. 3. I have degrees in Journalism/Public Relations and Political Science from the
20 University of Southern California and over 30 years of experience working in the
21 utility and energy-efficiency industries. My roles have been as manager and
22 director on program-level and organization-wide communications, marketing,
23 outreach, and stakeholder relations. I have been on the leadership team of my
24 employer for the last 15 years. Specifically, I have overseen the following efforts:

25 • While at the American Public Power Association, I managed an energy-
26 efficiency research and development program on behalf of roughly 400
27 public power utilities and a partnership with the Electric Power
28 Research Institute.

- 1
- At the Northwest Energy Efficiency Alliance (NEEA), I worked on the corporate communications and engagement team including building awareness for the organization at startup and establishing relationships with the region's investor-owned and public utilities. I supported marketing and communications management of the NEEA initiatives including ENERGY STAR clothes washers and lighting, LED holiday lighting, etc. I also led marketing for the primary commercial buildings program called BetterBricks.
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- At New Buildings Institute (NBI), I was responsible for development and outreach of the program focused on getting to zero energy and carbon emissions including education and training. I led communications and outreach for policy applications developed at NBI including the total replacement of Chapter 7 of the International Energy Conservation Code (IECC). I led a team that developed a Carbon Neutral Buildings Roadmap for the state of New York including research and modeling of electrification and decarbonization scenarios for state policy and programs.
- 9
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18

19 Q. 4. *Have you previously testified before the California Public Utilities Commission?*

20

21 A. 4. No.

22

23 Q. 5. *What exhibits are you sponsoring?*

24

25 A. 5. I am sponsoring CalMTA's testimony on the following:

- Exhibit MTA-04: MTAB Recruitment, Conflict of Interest Protocols, and Compensation
 - Exhibit MTA-06: Market Transformation Framework Compliance
- 26
- 27
- 28

- 1 ▪ Chapter 3: MTAB Feedback and Energy Efficiency Program
- 2 Administrator Collaboration and Coordination
- 3 • Exhibit MTA-08: Benefits to Environmental and Social Justice (ESJ)
- 4 Communities

5

6 Q. 6. *Was your testimony prepared by you or under your supervision?*

7

8 A. 6. Yes.

9

10 Q. 7. *Are the statements made in your testimony true and correct to the best of your*
11 *knowledge and belief?*

12

13 A. 7. Yes.

14

15 Q. 8. *To the extent that your testimony contains expressions of opinion, do they*
16 *represent your best professional judgment?*

17

18 A. 8. Yes.

19

20 Q. 9. *Does this conclude your statement of qualifications?*

21

22 A. 9. Yes.

1 **STATEMENT OF QUALIFICATIONS OF KAREN HORKITZ**

2
3 Q. 1. *Please state your name and business address.*

4
5 A. 1. My name is Karen Horkitz. My business address is: 5401 SW Alta Mira Circle,
6 Portland, OR 97239

7
8 Q. 2. *Briefly describe your current role with regard to CalMTA.*

9
10 A. 2. I am the Market Research and Evaluation Lead for the CalMTA program and a
11 member of the CalMTA leadership team. In this role, I am responsible for
12 oversight of CalMTA's evaluation and related activities and ensuring these
13 activities are conducted in an independent manner. This includes forecasting
14 incremental benefits and cost-effectiveness of the proposed MTIs and ensuring
15 that they are evaluable in accordance with best practices.

16
17 I am an independent contractor currently subcontracting to the Cadmus Group,
18 which is a subcontractor to Resource Innovations for the CalMTA program.
19 Beginning in 2025, I expect to subcontract directly to Resource Innovations on
20 this project.

21
22 Q. 3. *Please describe your relevant educational and professional background.*

23
24 A. 3. I have a Bachelor of Arts in Economics from Emory University and a Master's in
25 Management from the Massachusetts Institute of Technology Sloan School of
26 Management. I have over twenty years of experience in energy efficiency
27 program evaluation, working as an executive and as a consultant for a variety of
28 energy efficiency and market transformation program administrators. My

1 experience includes nine years leading market research and evaluation activities
2 for the Northwest Energy Efficiency Alliance (NEEA) and ten years as a senior
3 advisor to market transformation program administrators – for eight years as a
4 vice president with the Cadmus Group and for the past two years as the principal
5 consultant for my own firm.

6
7 Q. 4. *Have you previously testified before the California Public Utilities Commission?*

8
9 A. 4. No.

10
11 Q. 5. *What exhibits are you sponsoring?*

12
13 A. 5. I am sponsoring CalMTA's testimony on the following:

- 14 • Exhibit MTA-05: Expected Costs and Benefits of Proposed Market
15 Transformation Initiatives
- 16 • Exhibit MTA-06: Market Transformation Framework Compliance
 - 17 ▪ Chapter 2: Evaluation Plans for Validating Savings

18
19 Q. 6. *Was your testimony prepared by you or under your supervision?*

20
21 A. 6. It was prepared by me, based on analysis from staff under my supervision.

22
23 Q. 7. *Are the statements made in your testimony true and correct to the best of your
24 knowledge and belief?*

25
26 A. 7. Yes.

1 Q. 8. *To the extent that your testimony contains expressions of opinion, do they*
2 *represent your best professional judgment?*

3

4 A. 8. Yes.

5

6 Q. 9. *Does this conclude your statement of qualifications?*

7

8 A. 9. Yes.

1 **STATEMENT OF QUALIFICATIONS OF JEFF MITCHELL**

2

3 Q. 1. *Please state your name and business address.*

4

5 A. 1. My name is Jeff Mitchell. My business address is: 719 Main Street, Suite A
6 Half Moon Bay, California 94019.

7

8 Q.2. *Briefly describe your current role and responsibilities at Resource Innovations.*

9

10 A. 2. I am a Principal of Market Transformation at Resource Innovations. My primary
11 responsibilities include leading the identification and development of the CalMTA
12 portfolio of Market Transformation Initiatives (MTIs). This involves scanning for
13 market opportunities, intake and scoring, program development, and ultimately
14 leading market deployment activities.

15

16 Q. 3. *Please describe your relevant educational and professional background.*

17

18 A. 3. I hold a Bachelor of Science in Mechanical Engineering from Oregon State
19 University and a Master of Business Administration with a focus on business
20 analytics. I am a licensed Professional Engineer in the State of Washington
21 (License #45343). Additionally, I am a Certified Energy Manager through the
22 Association of Energy Engineers and a GRI Certified Sustainability Professional
23 from the Global Sustainability Standards Board.

24

25 Since 2001, I have worked in the energy industry, gaining extensive experience in
26 residential, commercial, and industrial energy efficiency and demand response,
27 measure development, program and process evaluation, and market
28 transformation.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27

Before joining Resource Innovations and CalMTA, I served as a Practice Lead at the Northwest Energy Efficiency Alliance, where I was responsible for mass-market products. This included residential water heating, consumer products, commercial fans and pumps, and residential HVAC systems.

Q. 4. *Have you previously testified before the California Public Utilities Commission?*

A. 4. No.

Q. 5. *What exhibits are you sponsoring?*

A. 5. I am sponsoring CalMTA's testimony on the following:

- Exhibit MTA-02: Description and Merits of the Proposed Market Transformation Initiatives
- Exhibit MTA-06: Market Transformation Framework Compliance
 - Chapter 1: MTI Development
 - Chapter 2: Evaluation Plans for Validating Savings
 - Chapter 3: MTAB Feedback and Energy Efficiency Program Administrator Collaboration and Coordination

Q. 6. *Was your testimony prepared by you or under your supervision?*

A. 6. Yes.

Q. 7. *Are the statements made in your testimony true and correct to the best of your knowledge and belief?*

1

2 A. 7. Yes.

3

4 Q. 8. *To the extent that your testimony contains expressions of opinion, do they*
5 *represent your best professional judgment?*

6

7 A. 8. Yes.

8

9 Q. 9. *Does this conclude your statement of qualifications?*

10

11 A. 9. Yes.

1 Over the span of five decades, I have regularly authored or coauthored
2 publications on energy efficiency evaluation issues, including conference papers,
3 journal articles, and book chapters. I have a total of roughly 75 refereed
4 publications, along with numerous reports written for clients.

5
6 In 2015, I received a lifetime achievement award from the International Energy
7 Program Evaluation Conference in recognition of my work in the EM&V field.

8
9 Q. 3. *Please describe your experience more specifically in the evaluation of market*
10 *transformation and market effects.*

11
12 A. 3. Since the early 1990s, my oversight work in the EM&V industry has required me
13 to regularly oversee evaluations of market transformation and market effects. In
14 the mid-1990s I developed a particular interest in this area and began frequently
15 publishing refereed publications on it, with the result that a majority of my
16 publications to date have focused on evaluation and policy issues relating to
17 market transformation and market effects. Two of the more influential of my
18 publications on market transformation were produced on behalf of the CPUC. A
19 Scoping Study on Market Transformation by California Utility DSM Programs (Eto,
20 Prael, and Schlegel, 1996) helped to systematize the concept of market
21 transformation nation-wide. More recently, the white paper Building a Policy
22 Framework to Support Energy Efficiency Market Transformation in California
23 (Prael and Keating, 2014) helped to lay the groundwork for the carving out of a
24 role for market transformation initiatives in California's policy framework and
25 program portfolio.

26
27 Q. 4. *Have you previously testified before the California Public Utilities Commission?*

28
29 A. 4. Yes, although not since the 1990s.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29

Q. 5. *Please discuss the nature of your business relationship with CalMTA, and of your role in helping to develop the current filings.*

A. 5. I serve as a strategic advisor to CalMTA under a subcontract with Resource Innovations, with a role that emphasizes, but is not limited to, evaluation issues. As part of that role, I have reviewed and commented on drafts of many of the materials included in the current filings, as well as on the CalMTA MTI Evaluation Framework and the MTIs themselves. In the course of my reviews, I have suggested some changes to draft analyses, and CalMTA has generally been open to those suggestions.

Q. 6. *What is the purpose of your testimony?*

A. 6. The purpose of my testimony is to support CalMTA's approach to the forecasting of cost-effectiveness and benefits of its proposed market transformation initiatives, as reflected in its current filing.

Q. 7. What exhibits are you sponsoring?

A. 7. I am sponsoring Exhibit MTA-10.

Q. 8. *Was your testimony prepared by you or under your supervision?*

A. 8. Yes.

Q. 9. *Are the statements made in your testimony true and correct to the best of your knowledge and belief?*

1 A. 9. Yes.

2

3 Q. 10. *To the extent that your testimony contains expressions of opinion, do they*
4 *represent your best professional judgment?*

5

6 A. 10. Yes.

7

8 Q. 11. *Does this conclude your statement of qualifications?*

9

10 A. 11. Yes, it does.

1 **STATEMENT OF QUALIFICATIONS OF NILS STRINDBERG**

2
3 Q. 1. *Please state your name and business address.*

4
5 A. 1. My name is Nils Strindberg. My business address is: 719 Main Street, Suite A
6 Half Moon Bay, California 94019.

7
8 Q. 2. *Briefly describe your current role and responsibilities at Resource Innovations.*

9
10 A. 2. My current role at Resource Innovations is Principal for Policy on the CalMTA
11 team. My primary responsibilities include acting as CalMTA's subject matter
12 expert on the energy efficiency proceeding and Commission rules, processes,
13 and procedures, and tracking proceeding/rulemakings of state and federal
14 agencies and legislative efforts of relevance to CalMTA.

15
16 Q. 3. *Please describe your relevant educational and professional background.*

17
18 A. 3. I received a Bachelor of Arts in Political Science from the University of California,
19 Davis and a Master of Public Policy with a focus on Energy Policy and the Federal
20 Budget Process from The George Washington University. In early 2012, I joined
21 the CPUC's EE Branch and held Regulatory Analyst and Senior Regulatory
22 Analyst roles of increasing responsibilities until leaving the CPUC to join
23 Resource Innovations in March of 2023.

24
25 I would add that in my former role, I was involved in a couple of assignments and
26 projects that are of particular relevance to my testimony:

- 27 • I was assigned as the staff lead at the CPUC's Energy Division to review
28 and make recommendations on the approval of more than a dozen
29 annual budget advice letters (ABALs).

- 1 • As noted in my testimony, I was an Ex-Officio and non-voting member
2 of the CAEECC EE Filing Process Working Group, which eventually
3 resulted in D.21-05-031, which eliminated the requirements of EE PAs
4 to file ABALs.

5
6 I also worked at the California Energy Commission between about May 2014 to
7 June of 2015 working as Senior Efficiency Specialist on the Existing Buildings
8 Energy Efficiency Action Plan before rejoining the CPUC in August of 2015.

9
10 Q. 4. *Have you previously testified before the California Public Utilities Commission?*

11
12 A. 4. No, I have not.

13
14 Q. 5. *What exhibits are you sponsoring?*

15
16 A. 5. I am sponsoring Exhibit MTA-09, on why our procedural requests should be
17 approved by the Commission.

18
19 Q. 6. *Was your testimony prepared by you or under your supervision?*

20
21 A. 6. Yes, it was.

22
23 Q. 7. *Are the statements made in your testimony true and correct to the best of your*
24 *knowledge and belief?*

25
26 A. 7. Yes, they are.

27
28 Q. 8. *To the extent that your testimony contains expressions of opinion, do they*
29 *represent your best professional judgment?*

1

2 A. 8. Yes, they do.

3

4 Q. 9. *Does this conclude your statement of qualifications?*

5

6 A. 9. Yes, it does.