



REQUEST FOR PROPOSALS

CalMTA Organizational Review

Proposals due

Friday, October 3, 2025 by 6 p.m. PT

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List of RFP Documents

- 1) CalMTA Organizational Review Request for Proposal (RFP) (*this document*)
- 2) Conflict of Interest (COI) Form (Attachment 1)
- 3) Non-disclosure Agreement (NDA) (Attachment 2)
- 4) Program Services Agreement (*will be provided upon receipt of a signed NDA*)



*CalMTA is a program of the California Public Utilities Commission (CPUC)
and is administered by Resource Innovations*

1. Introduction

CalMTA is a program of the California Public Utilities Commission (CPUC) that develops and manages market transformation initiatives (MTIs) to increase cost-effective energy efficiency and support California's energy and climate goals. CalMTA was formed as a result of CPUC Decision 19-12-021, which authorized funding for and creation of a statewide Market Transformation Administrator and adopted a framework (MT Framework) for identifying and managing a portfolio of California Market Transformation Initiatives (MTIs) to accelerate progress towards California's ambitious climate goals. CalMTA also seeks to develop MTIs that help advance California's goals on demand flexibility, workforce development, and equity.

In November 2022, Resource Innovations was named administrator of the CalMTA program. Since then, the CalMTA team has developed practices and systems to support both its start-up period (first three years of operations) and ongoing organizational operations for the next five years of the program contract. CalMTA's focus during its first three years has been on soliciting, prioritizing, and developing market transformation (MT) ideas into full MTI Plans that when implemented are projected to deliver large, cost-effective, and long-term benefits to Californians. In accordance with Decision 19-12-021, PG&E submitted an application to the CPUC on behalf of CalMTA in December 2024 to release funding for the next five-year period, which will enable launching the first two proposed MTIs and continue advancement of the pipeline of developing MT ideas. The Commission's final decision on this application is expected in October 2025.

The CPUC Energy Division and CalMTA staff are committed to a high level of performance and accountability. In keeping with that commitment and the intent of D.19-12-021, the CPUC's Energy Division and Resource Innovations are soliciting a third-party firm to conduct this Organizational Review to identify opportunities to improve operational practices and systems. We anticipate the results of this study will inform ongoing operational improvement as CalMTA heads into its next five years of full-scale operations. The Energy Division will oversee the Organizational Review study, in collaboration with members of the CalMTA leadership team supporting (Study Team).

2. Study Objective

The Energy Division and Resource Innovations are seeking qualified consultants to conduct an Organizational Review of CalMTA. The overarching objective of this study is to conduct a thorough operational review of CalMTA and identify opportunities to improve its practices and systems, including those related to communication, administration, MTI management, and overall organizational effectiveness. This review will focus on practices and systems developed during CalMTA's three-year start-up period, which is expected to conclude in November 2025.



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The Study Team developed a preliminary list of some specific research questions:

1. How effective and transparent has CalMTA reporting and communication been from the perspective of key stakeholders and the Market Transformation Advisory Board (MTAB)?
2. How effectively has CalMTA managed the operations of the MTAB, including meetings, communication, opportunities for and responsiveness to input?
3. How has CalMTA performed against its annual Operations Plans in terms of meeting described objectives and quarterly milestones?
4. How has CalMTA performed in terms of financial administration, including invoicing, accruals, and forecasting?
5. How is CalMTA performing with respect to its equity approach?
6. How effective are CalMTA's processes for concept and strategy development of its MTIs?
7. For each area of review, what has worked well? What opportunities for improvement exist?

Bidders are encouraged to recommend additional topics, within the study scope and budget.

3. Scope of Work

This study will examine operational practices and systems that have not been previously reviewed as part of the application proceeding and are not slated for review as part of the MTI Evaluation Plans. Table 1 lists the operational practices and systems that should be addressed in this study. Table 2 lists the topics that fall outside the scope of this study and the mechanism by which they will be addressed.

Bidders are encouraged to suggest additional areas of scope but should note that the topics in Table 2 will not be considered for inclusion in the scope.



Table 1: Topics with the Organizational Review Study Scope

Operational Areas
<ul style="list-style-type: none">• Stakeholder engagement and reporting<ul style="list-style-type: none">◦ Quarterly and Annual reports◦ CalMTA website◦ Stakeholder calls◦ Equity Sounding Board• MTAB Formation, Recruitment, and Operations• Administrative Activities<ul style="list-style-type: none">◦ Financial administration (Invoicing, Accruals, Forecasting)◦ Operations plan execution (meeting milestones)• MTI Concept and Strategy Development<ul style="list-style-type: none">◦ Advancement Plan and MTI Plan development & management
Systems
<ul style="list-style-type: none">• Salesforce• Asana

Table 2: Out of Scope Topics

Topic	Review Mechanism
Compliance with the MT Framework adopted by D.12-19-021	To be addressed as part of the pending Application proceeding, which will be completed prior to kickoff of Organizational Review.
Forecasting and measurement of MTI impacts and cost effectiveness	Independent third-party program evaluators will conduct annual MTI evaluations after MTI Phase III Market Deployment begins

The Study Team anticipates three primary tasks for this study.

3.1 Document Review

The consultant will review a sample of CalMTA documentation and work product materials. These may include the CalMTA Operations Plan, operating budget, and CalMTA reports – examples of which bidders can find at www.CalMTA.org. CalMTA will also provide a sample of project plans (extracted from Asana) and will assign a staff liaison to ensure that the selected consultant is able to access these and other materials pertinent to the study scope.

3.2 Interviews

The consultant will conduct interviews with a sample of current and past members of CalMTA's advisory board (MTAB), CalMTA staff, and CalMTA stakeholders.

3.3 Reporting

The selected consultant will prepare a draft report of findings, conclusions, and recommendations for review and comment by the Study Team. After revising the report to incorporate feedback, the consultant will produce a final report and summary PowerPoint presentation.

4. RFP and Study Schedule

Milestones	Date
RFP Release	September 8, 2025
Intent to Bid	<i>Must be received prior to proposal submission</i>
Q&A Period Closes	September 24, 2025
Proposal Due Date	October 3, 2025
Bidder Interviews (if required)	Week of October 20, 2025
Bidder Selection	October 31, 2025
Contract Negotiations	November 3 - 21, 2025
Project Kickoff	Week of December 1, 2025
Draft Report	March 31, 2026
Presentation	TBD
Final Report	May 22, 2026

5. Budget

The Study Team anticipates a project budget between \$75,000 and \$100,000.

6. Submitting an Intent to Bid

Each firm (team) that intends to submit a proposal must start the process by first submitting an intent to bid. Firms can submit their intent to bid on the CalMTA Solicitation Portal (which is also where bidders will submit proposal responses). To access the Solicitation Portal, visit the CalMTA Organizational Review RFP webpage at: <https://calmta.org/organizationalreview-rfp>.

The intent to bid, while required, is non-binding. After submitting the intent to bid, bidders will:

1. Receive an NDA for DocuSign via email (see the next section for details).
2. Receive any communications sent to bidders.
3. Be able to view the Q&A response document (summarized responses to bidder questions).
4. Be able to Create, Edit, and Submit proposal response documents.

7. NDA Requirement

Only bidders who sign an NDA, will have an opportunity to review the Program Services Agreement. Any proposed redlines to the Program Services Agreement terms must be submitted with your proposal documents. Bidders may also choose to submit a “Statement of No Exceptions” in lieu of redlines. (Please note that bidders who heavily redline the Program Services Agreement terms may receive a lower Risk Management score.)

While the NDA is included in the RFP documents package, it must be signed electronically via DocuSign. We will not consider exceptions to the NDA. After you submit your intent to bid, you will receive the NDA for DocuSign via email. The recipient may reassign the DocuSign to the desired signatory. Once the NDA has been signed, we will send the Program Services Agreement via email.

8. Question & Answer Period

Bidders can submit any questions or requests for clarifications through the CalMTA Solicitation Portal. The Study Team will attempt to answer questions within 48 hours and will post them for all bidders on the CalMTA Solicitation Portal. The deadline for submitting questions is September 24, 2025.

9. Proposal Submission

Interested firms are invited to submit their proposals by uploading the required attachments to the CalMTA Solicitation portal. The following documents must be uploaded to the portal:

1. Your Proposal Response Document (one PDF) including:
 - a. Proposal narrative (limited to 10 pages)
 - i. Company background and qualifications.
 - ii. Detailed approach to completing each task, along with any additional suggested tasks/approaches.
 - iii. Proposed key personnel, subcontractors, team structure, and approach to project management.
 - iv. Proposed timeline, deliverables, milestones, and budget.
 - b. Supporting materials
 - i. Previous work samples relevant to the scope of this study.
 - ii. Resume for proposed key personnel.
 - iii. Diverse supplier certificates for the prime and subcontractors (as applicable)¹

¹ CPUC Supplier Clearinghouse or equivalent.

2. Signed and completed Conflict of Interest Form (Attachment 1)
3. Exceptions to Program Services Agreement or a No Exceptions Statement. (The Program Services Agreement will be provided upon receipt of a signed NDA.)

Bidders must submit proposals via the CalMTA Solicitation Portal. To access the Solicitation Portal, visit the CalMTA Organizational Review RFP webpage at:

<https://calmta.org/organizationalreview-rfp>.

10. Proposal Evaluation Criteria and Selection

The successful bidder will demonstrate previous experience conducting organizational reviews of similar scope.

The Study Team will assess proposals based on these criteria:

1. Expertise/experience of firm and proposed team
2. Understanding of study scope and proposed approach to conducting the work
3. Proposed cost estimate
4. Adherence to project schedule/timeline
5. Risk management (bidder's substantive exceptions to the contract terms and conditions)

In addition to the criteria listed above the Study Team will consider supplier diversity in its selection of the consultant.

The Study Team may ask finalists to participate in an interview (virtually) approximately two weeks after the RFP closes.

11. Conflict of Interest

Each bidder must complete and submit the Contractor Conflict-of-Interest Certification form. The information provided in the form will be used by the Study Team to assess whether the firm has a conflict of interest deemed significant enough to disqualify them from eligibility. If a decision to disqualify is made, CalMTA will notify the bidder.

Details on what qualifies as a conflict of interest and disclosure instructions are provided in the Contractor Conflict-of-Interest Certification form.

12. Contractual Considerations

The selected firm will be required to enter into a formal subcontract with Resource Innovations, governed by the provided Program Services Agreement and negotiated scope of work. Any bidder-requested exceptions to the Program Services Agreement terms must be submitted with the bidder's proposal.



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CalMTA has the right to accept or reject any proposals received and may negotiate with the selected consulting firm to finalize the terms of the engagement. Any proposed redlines to the Program Services Agreement terms must be included with proposal documents. Bidders who heavily redline the Program Services Agreement terms may receive a lower Risk Management score.

Thank you for your interest in working with CalMTA. We look forward to receiving your proposals.

13. About CalMTA

CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations. We work to deliver cost-effective energy efficiency and decarbonization benefits to Californians through a unique approach called market transformation. Market transformation is 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. CalMTA-developed market transformation initiatives also aim to advance state goals on demand flexibility, workforce development, and equity. Learn more at www.calmta.org.



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