



Room Heat Pumps Market Transformation Implementation Pre-Bid Webinar Q&A

The following are responses to the questions received during the pre-bid webinar that took place on December 11, 2025. In most cases, questions received and answers provided live during the webinar are presented verbatim.

	Question	Answer
1	Can you say again what the RFP is requesting proposals for? R&D? Rebates? Marketing? Market research? Something else?	We'll be covering the key activities in a couple of slides. They include manufacturer engagement, market engagement, awareness building, and supply chain engagement.
2	Where is the link to the RFP portal?	The link to the RFP portal can be found here: https://calmta.org/room-heat-pumps-rfp/
3	Would a proposal for possible modification of existing heat pump products be entertained? --- we would need to team with interested manufacturers.	We would certainly be open to modifications or additions to existing heat pump products or ways to address market barriers to heat pump adoption in the California market, but we have also spent the last 18 months conducting research and talking with manufacturers and other energy efficiency partners. What we have to date is based on what we have learned through extensive research during the program development phase, but we recognize markets change and we can adapt.
4	I'm not sure I've ever been required to sign an NDA to then submit an RFP response - please clarify what sort of confidential information will be shared, and why the NDA is required?	The NDA is needed in order for us to share the contract terms and conditions (Program Services Agreement), which includes some confidential contract terms from Resource Innovations' contract with PG&E that we are required to apply (flow down) to this work. The Program Services Agreement is the only additional information you will receive after submitting the NDA.

5	Will questions be answered publicly?	Yes, we'll answer some questions live in this presentation. We will also share responses publicly with all firms that submit questions and/or intents-to-bid.
6	Is it a priority for CalMTA to award teams of firms over individual firms?	We do not have a preferred approach. However, we would look to minimize administrative costs and having a team could reduce overall program costs.
7	Will there be ongoing technical support for organizations that are applying to this type of RFP for the first time?	Yes, there will be technical support for the website and submission process during the RFP. CalMTA will also provide room heat pump technical product support from CalMTA during implementation, but it is expected that the awarded team will have their own expertise in this area as well, especially for Implementation Area 1: Manufacturer Engagement.
8	Why are the contract terms and conditions under NDA? In all other RFPs we've seen, the contract terms and conditions are part of the solicitation packet, and are available for review by any interested party, whether or not they respond to the RFP.	The contract terms and conditions contained in the Program Services Agreement are under NDA because the Program Services Agreement includes some confidential contract terms (flow downs) from Resource Innovations' contract with PG&E.
9	Is it an expectation for the RFP responder to provide/coordinate the demos or enable CalMTA?	Yes. While CalMTA will likely provide input and some support, it is expected that the contractor will coordinate the demos.
10	Can you please explain more about the Conflict of Interest Certification. Can you please review what conflict would make an organization ineligible?	Broadly, any financial or contractual relationship that would impair the ability of the organization to conduct the CalMTA work in an impartial and unbiased manner could be deemed a disqualifying conflict. Examples are 1) if the organization or any of its contractors, subcontractors, or consultants bidding with the firm, are performing energy efficiency program impact-related studies for the CPUC, including embedded measurement and verification work, that produce impact findings on program or portfolio accomplishments for programs that target the room

		heat pump market, or 2) if the organization is an owner of, or has a significant financial interest in, a company that manufactures or sells room heat pumps. It is important that bidders fill out the COI Certification Form completely so that any potential conflicts can be reviewed. Regarding the first example (performing evaluation work on programs that promote room heat pump technology), a bidder may be permitted to bid with submission of a mitigation plan, including but not limited to an appropriate internal firewall, subject to written approval of the CPUC Contract Manager. If uncertain whether a specific situation would qualify as a conflict, err on the side of disclosing it on the COI Certification Form.
11	Will you be answering questions about the RFP itself and/or providing guidance on how to correctly submit documents.	You can ask questions through the RFP Portal before 5pm on Dec. 22. Your questions can be about the RFP itself and/or how to correctly submit documents - any questions you have are welcome.
12	Who is doing the outreach and scheduling of these projects? The contractor? Or Resource Innovations?	We would prefer the selected implementer to conduct outreach and scheduling. The implementer will have access to the CalMTA team and the network of stakeholders developed over CalMTA's three-year launch period to support identification and outreach as needed.
13	<p>The different Implementation Areas seem to have potentially vastly different budget requirements - e.g. doing product development could cost many hundreds of thousands of dollars, while a single product demo event might cost only a couple thousand.</p> <p>How are you thinking about allocating the total budget between awards for the different Implementation Areas?</p>	<p>CalMTA has provided a proposed budget estimate per Implementation Area. This budget is based on assumptions related to key activities and scale of those activities. Funds can be shifted between activities as needed.</p> <p>In addition, please see the "Overall program cost estimates" section of the RFP which mentions the additional budget classified as "incentives" that can be utilized to pay market actors for product development or purchasing equipment for product demos. The amounts estimated in each implementation area are primarily for expertise to implement the interventions.</p>

14	Can you please reprint these questions and your "live" responses into the printable and posted Q&A documents for everyone?	Yes, we will send out the questions and answers, including the "live" answers from this webinar afterward to everyone who registered for this webinar. It will also be visible in the RFP portal for those who have submitted an intent to bid.
15	For Implementation Area 3 - Does CalMTA already have metrics that they would like the success of this program to be measured against?	Yes, please review Appendix F: Evaluation Plan, especially the attached Evaluability Map. This details the market outcomes that stem from interventions contained in the logic model, market progress indicators (MPIs) that we will need to track, and the expected market milestones.
16	I see budget allocated for "Incentives" - are you asking RFP respondents to propose incentive program design, implementation, incentive amounts, eligibility criteria, etc.? Or will CalMTA be offering an incentive program using the incentive budget?	The development of incentive approaches for the MTI have been tested somewhat in the program development phase. To date, this has largely targeted retailers and are considered "stocking incentives" as opposed to consumer incentives. We have learned a great deal but we will need to develop a broader set of market transformation (MT) mid- and upstream incentive approaches in partnership with the implementers. Expertise with MT incentive design that motivates market actors to change behaviors and could be layered with downstream consumer rebates offered elsewhere is welcome. As explained in the "Overall program cost estimates" section of the RFP, any incentive budgets the MTI does deploy (to retailers or HVAC distributors or other market actors) are separate from the implementation budgets included in this RFP and will be processed through current CalMTA systems.
17	You just mentioned "the implementation firm we hire" - that implies a single firm - will this RFP result in just one award?	No, this RFP could result in an award to a single firm, team, or multiple awards.
18	Does an organization have to apply to do all 5 implementation areas or can we just apply to one area?	You may bid on one or more Implementation Areas individually or as part of a larger team. Please note that <i>Implementation Area 5: Coordinating with other California programs</i> is a required component of all

		proposals and cannot be submitted for standalone implementation as it is integrated into all other areas.
19	Is the hope to select 1 implementer to cover all implementation areas (IA) or multiple implementers to work on different IA's, while also working together as needed?	We are open to either scenario based on the best proposals submitted. Ideally, because of the inherent coordination required between each Implementation Area and the overall CalMTA Room Heat Pump MTI team, any proposal will need to demonstrate a clear and streamlined coordination process between each area.
20	Are you accepting proposals for each individual implementation area or are only team proposals covering all areas accepted?	You can propose either individually or as part of a team.
21	Is there a vision for the specifics around deliverables per implementation or are the specifics at the discretion of the awarded firm?	CalMTA has provided a list of suggested activities at the end of each Implementation Area in the RFP. If the bidder has new or innovative approaches to transforming this market they are encouraged to propose these ideas in their response and add new deliverables.
22	Is Resource Innovations eligible to bid on the implementation?	No. As the administrator for CalMTA, Resource Innovations is ineligible to bid on CalMTA implementation work.
23	Do all RFPs have to submit to Implementation Area 5?	Yes, Implementation Area 5 (<i>Coordinating with external California programs</i>) is a required component of all proposals and cannot be submitted for standalone implementation, as it is integrated into all other areas.
24	As a product distributor, should we connect with bidding teams prior to submission, or will this be handled separately?	Distributors are welcome to connect with bidding teams prior to submission if they feel their expertise will be helpful in the requested Implementation Areas. CalMTA intends to conduct outreach, with the help of the implementation team, to distribution partners as part of Implementation Area 4.

25	<p>Will CALMTA be able to essentially "marry" teams that propose on a variety of 2 Implementation Areas? Or just give them individual contracts but require them to all coordinate together and through IA5? Please clarify participation for small firms or CBO's.</p>	<p>If the contract award goes to multiple implementation firms, contracts would most likely be entered individually between each awarded firm and CalMTA. Each firm would be required to closely coordinate activities and provide full support to the other team members. If your firm is looking for partners, please add your information to the "teaming" form.</p> <p>The RFP Portal includes two links: 1) a "teaming" form where you can submit your information and indicate the Implementation Area you will be bidding on and 2) the contact information and Implementation Areas of other firms who wish to team. You can use this information to contact the other firms for the purpose of teaming.</p>
26	<p>Is there a way to see organizations who are interested in the RFPs, so we can potentially team together?</p>	<p>Yes, once you create an account in the RFP Portal you can submit a form for teaming with other firms and view other firms' information who have completed the teaming form.</p>
27	<p>Can you provide a sense of how many firms you expect to participate in the RFP?</p>	<p>We are unable to estimate at this early stage.</p>
28	<p>How will individuals or CBOs outreach to or find other partners (firms) to team with?</p>	<p>The RFP Portal includes two links: 1) a "teaming" form where you can submit your information and indicate the Implementation Area you will be bidding on and 2) the contact information and Implementation Areas of other firms who wish to team. You can use this information to contact the other firms for the purpose of teaming.</p>
29	<p>Can an installer contractor partner with an outreach firm?</p>	<p>Yes, an installer can certainly partner with an outreach firm on certain areas, like <i>Implementation Area 2: Building owner engagement</i>. Bidders should be aware that as a statewide market-based approach, the Room Heat Pump MTI and chosen implementer(s) will be looking to overcome holistic market barriers and will seek to reach a broader group of installation</p>

		contractors over time who will make these products a regular part of their offering to customers.
30	If a firm applies for multiple areas of work but CalMTA only wants to award one, can CalMTA split the proposal and just award one area?	It's possible that a firm could propose in multiple areas but only be awarded one. Any reduction in proposed scope would need to be negotiated and agreed to by both parties.
31	Can you clarify how you intend to award contracts for Implementation Area 5? Will one firm be selected for this area, or will all firms awarded contracts for Implementation Areas 1-4 be awarded a contract that includes Area 5? If yes, is the \$100K budget total or per contract?	In the event that multiple bidders are selected, both will be expected to include scope related to Implementation Area 5 given its interconnected nature across all Implementation Areas. If that happens, more budget may be allocated to Implementation Area 5 to accommodate multiple contractors.
32	Will selected firms be hired to do the Program Design including equitable attributes?	Firms will be asked to deliver the services outlined in each Implementation Area they are selected for and will be responsible for developing an Implementation Plan inclusive of those activities, including any new or innovative ideas they propose as part of their RFP response. The Room Heat Pump MTI Plan and RFP Implementation Areas include strategies to prioritize equity considerations and ensure that MTI benefits are accessible to ESJ communities, but we welcome suggestions from bidders on additional ways to maximize the equity impacts of this MTI. We also encourage participation of diverse firms in the RFP process, as reflected in our scoring criteria. Throughout MTI implementation, the selected implementation team will have the opportunity to work with equity consultants on CalMTA's team, including a representative of The Ortiz Group, and to connect with CalMTA's dedicated Equity Sounding Board as desired.
33	Could you clarify whether the intent is to award the full scope of work to a single firm or to multiple firms? Deferring this decision until later may result in applicants investing significant effort in	It is possible that a single implementation team or multiple firms will be awarded. We will be evaluating each Implementation Area separately. If your firm is looking for partners, please add your information to

	<p>proposals that are ultimately not aligned with the award structure. Other RFPs provide this information upfront, and greater clarity here would help ensure that applicants can prepare their responses appropriately.</p>	<p>the "teaming" form on the RFP Portal.</p>
34	<p>What do I do if I have technical issues creating an account or signing into the portal?</p>	<p>Send an email to info@calmta.org with your specific details if you are having an issue signing into the RFP portal.</p>
35	<p>I'm not sure I've ever been required to sign an NDA to then submit an RFP response - please clarify what sort of confidential information will be shared, and why the NDA is required?</p>	<p>The NDA is needed for us to share the contract terms and conditions (Program Services Agreement), which includes some confidential contract terms from Resource Innovations' contract with PG&E that we are required to apply (flow down) to this work. The Program Services Agreement is the only additional information you will receive after submitting the NDA.</p>