



REQUEST FOR PROPOSALS

Room Heat Pump Market Transformation Initiative Evaluation

--and--

Induction Cooking Market Transformation Initiative Evaluation

Proposals due

Monday, August 31, 2026, by noon (12 p.m.) PT

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

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1 Introduction

The California Market Transformation Administrator (CalMTA) is the statewide administrator that develops and manages market transformation initiatives (MTIs) to increase energy efficiency and support California's energy and climate goals. CalMTA was formed as a result of California Public Utilities Commission (CPUC) Decision 19-12-021, which authorized funding for and creation of a statewide Market Transformation Administrator and adopted a framework ([CalMTA Market Transformation Initiative Evaluation Framework](#)) for identifying and managing a portfolio of market-level initiatives. CalMTA's MTIs aim to deliver cost-effective energy efficiency and reduce greenhouse gas (GHG) emissions for California ratepayers. CalMTA's role includes assessing the performance and market progress of each MTI based on well-established market transformation (MT) program evaluation approaches. CalMTA-developed MTIs also aim to advance state goals on demand flexibility, workforce development, and equity.

Timely evaluation is essential to the successful implementation, management, and ongoing refinement of MT programs. Evaluation informs effective evolution of initiatives and ongoing investment decisions and supports strong management accountability, which in turn can enhance stakeholder trust and collaboration. CalMTA and the CPUC's Energy Division are responsible for overseeing the implementation of rigorous and strategically focused evaluation, measurement, and verification (EM&V) practices that will enable CalMTA management and stakeholders to continually gauge the performance of the MTIs and of CalMTA, verify incremental MTI impacts, and improve the design and success of current and future MTIs.

In accordance with the evaluation framework, the foundational principles guiding CalMTA MTI evaluations are:

- Theory-based evaluation (TBE), which relies on clear program theory, logic models, and associated MPis as the foundation upon which to establish the market influence, progress, and causal impact of MTI interventions
- Unambiguous MTI progress and impact goals and metrics
- Data-driven, transparent analysis methods
- Agreed-upon methodology to determine incremental impact of each MTI

2 Study objectives

CalMTA seeks qualified bidders, or teams of bidders, to conduct evaluations of its Room Heat Pumps (RHP) and Induction Cooking MTIs. CalMTA kicked off the RHP MTI in July 2026 and anticipates the Induction Cooking MTI will begin implementation during Q4 2026. Bidders may submit proposals to evaluate one or both MTIs. **Bidders interested in evaluating both the RHP and Induction Cooking MTIs must submit a separate proposal (a separate PDF file) for the evaluation of each initiative.** Proposals will be reviewed and scored individually by the scoring team.



The objectives of the evaluations for the RHP and Induction Cooking MTIs are to (separately, for each MTI):

- Monitor market dynamics and characteristics; assess market developments
- Review and assess the MTI program theory and logic model (PTLM)
- Measure market progress and equity, per the market progress indicators (MPIs)
- Assess MTI causality per the logic model, following established MT evaluation best practices
- Identify gaps in implementation and opportunities to adjust MTI strategy and tactics to improve MTI effectiveness and equity
- Review CalMTA's market adoption and cost-effectiveness forecasts

Links to the RHP and Induction Cooking MTI Plans and appendices, including preliminary evaluation plans, are provided in the Supporting Documentation section below. Bidders should refer to the CalMTA-developed RHP and Induction Cooking MTI Evaluation Plans when developing proposals; however, bidders should consider the CalMTA-developed RHP and Induction Cooking MTI Evaluation plans as preliminary. Bidders are encouraged to suggest additional or alternative tasks, approaches, data sources, or deliverables to enhance the timeliness, rigor, or transparency of the MTI evaluations and, ultimately, to improve delivery of the RHP and Induction Cooking MTIs.

Evaluations of CalMTA's MTIs will require effective coordination and collaboration with other research efforts occurring within California, as other program administrators (PAs) are running similar programs in the same markets as the RHP and Induction Cooking MTIs.

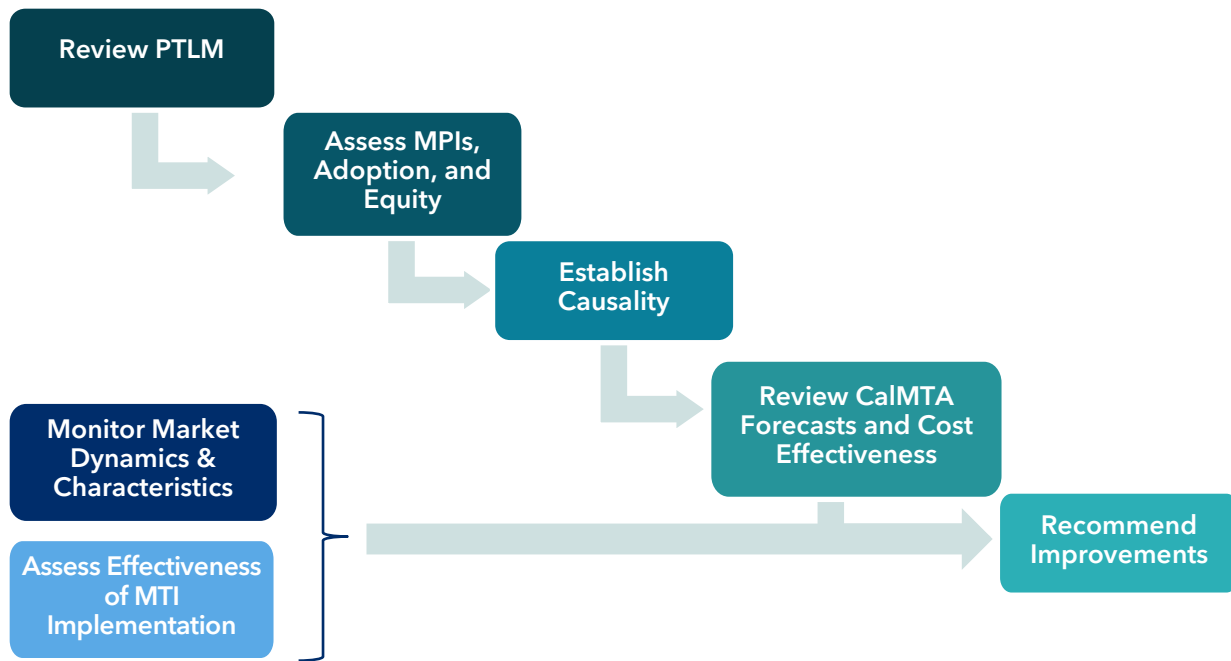
Proposals should focus on the bidder's proposed approaches to the RHP MTI evaluation scope of work and budget through December 31, 2029, and the Induction Cooking MTI evaluation scope of work and budget through March 31, 2030.

3 Scope of work

CalMTA anticipates seven primary tasks for the RHP MTI evaluation and the IC MTI evaluation. Each of the tasks pertains to both the RHP MTI evaluation and the IC MTI evaluation. Figure 1 depicts a high-level summary of the key components CalMTA anticipates for the first-year evaluation.



Figure 1. Evaluation process



Bidders should describe their proposed approach to each of the tasks and deliverables described in the following sections. Bidders are encouraged to propose innovative and/or alternative approaches that deviate from what appears in the preliminary evaluation plans for each MTI.

Task 1: Finalize evaluation plan and project management

The selected bidder (also referred to as the evaluator) will organize and conduct a kick-off meeting with members of the MTI team shortly after contract award to present the selected bidder's draft evaluation plan and to discuss and agree upon evaluation goals, approaches, methodologies, communication protocols, data sources, strategies to address data gaps, data management, deliverables, and project schedule.

The evaluator will prepare a final evaluation plan based on decisions reached during the kickoff meeting and any follow-up discussions.

This task also includes effective project management for the evaluation of the RHP and Induction Cooking MTI evaluations. Bidders should identify the evaluation team's key personnel – including key personnel of any subcontractors – and describe the team structure, roles and responsibilities, communications approach, expected meeting cadence, data request approach, and coordination with evaluations of similar programs in California. Key personnel are expected to perform oversight and quality control and to participate in major presentations.

Key deliverables for Task 1 include:

- Kickoff meeting agenda and presentation slides

- Initial data request
- Draft and final evaluation plans, including overall project schedule and deliverables and their delivery dates
- Project management plan, including hours for each team member.

Task 2: Review program theory and program implementation

The evaluator will compare the MTI program theories, logic models, and MPIs to the actual market interventions implemented by CalMTA and the outputs and outcomes resulting from those interventions. Using data gleaned from appropriate sources, the evaluator will recommend improvements to the PTLM and MPIs.

After completing these and additional market evaluation activities, the evaluator will assess the extent to which the MTI interventions are addressing the market barriers identified in the logic model and leading to the theorized outcomes. The evaluator will identify opportunities to improve the logic model and MPIs and recommend ways to refine market interventions so they more effectively influence the market.

Key deliverables for Task 2 include:

- Memorandum including:
 - Description of discrepancies between the PTLM and MPIs and the MTI's actual interventions and outputs
 - Recommendations for improvements to the PTLM and MPIs

Task 3: Collect and analyze data

In this task, the evaluator will collect both secondary and primary data to enable CalMTA to monitor market characteristics and dynamics and to assess each MTIs' market progress, causality, and equity. Information the evaluator gleans from this task will inform other evaluation tasks and enable CalMTA to make timely adjustments to the RHP and Induction Cooking MTIs.

CalMTA conducted 2024 Market Characterization studies of the RHP and Induction Cooking markets. Those studies characterized baseline market conditions and yielded values for some of the MPIs shown in the preliminary RHP and Induction Cooking Evaluation Plans (see links in the Supporting Documentation section below). Bidders should propose data collection and analyses efforts for the MTI market progress evaluations that build on some of the information collected for the 2024 studies and fill important gaps in the data required for tracking key market metrics and outcomes.

Task 3a: Review MTI program data and materials

CalMTA and its RHP and Induction Cooking implementation contractors will track and record the team's activities and interventions, including the timing of each action/activity. The evaluator will regularly review this information for use in the evaluations.



Task 3b: Review secondary data and conduct literature review

The evaluator will use some of the same sources that CalMTA used for the baseline Market Characterization studies (see links in the Supporting Documentation section below) to update information about the RHP and Induction Cooking markets. These sources provided insights into appliance saturation levels, behaviors, and other characteristics of California homes and market trends. They included the U.S. Census' American Community Survey, the U.S. Energy Information Administration's 2020 Residential Energy Consumption Survey (RECS), the 2019 California Residential Appliance Saturation Study (RASS), California regulatory filings and dockets, and the California Electronic Technical Resource Manual (eTRM), among others.

During the literature and secondary data review, and throughout the course of their work, the evaluator will identify relevant data sources or literature beyond those that CalMTA used (e.g., new evaluations or market studies) to address research needs and integrate findings from the new sources into the evaluation.

Task 3c: Collect and analyze California sales and program data

The evaluator will analyze sales data from multiple sources (for example, ENERGY STAR Retail Product Platform [ESRPP] and point-of-sale data from Circana) and determine the scope and market coverage, areas of overlap, and any remaining gaps in retail channel data.

CalMTA has negotiated data sharing agreements with manufacturers and distributors and expects to obtain full category sales data for the RHP and Induction Cooking markets from ESRPP-participating retailers; CalMTA will share this data with the evaluator. The evaluator will work with CalMTA to specify and purchase additional sales or shipment data from sources such as ENERGY STAR, Association of Home Appliance Manufacturers (AHAM), and Heating, Air-conditioning & Refrigeration Distributors International (HARDI) to fill any gaps in the retail sales data obtained through ESRPP. Bidders should assume additional costs of sales or shipment data will be paid out of a budget that is separate from this scope of work.

The evaluator will also analyze PA program and California Energy Data and Reporting System (CEDARS) data to understand program-driven adoption levels. The evaluator will make recommendations on how to use the data to determine market adoption of RHPs and Induction Cooking, as well as any other relevant MPIs.

Task 3d: Collect primary data

The evaluator will develop a sampling and research plan that enables longitudinal tracking of key market characteristics and MPIs to measure the progress of each MTI toward achieving theorized market changes and transforming the market. The evaluator will clearly document data sources, sampling strategy, and sample frame development so results can build on previous baseline and evaluation findings.

CalMTA's preliminary RHP and Induction Cooking Evaluation Plans identified primary data collection activities ranging from residential consumer surveys to manufacturer, property



manager, and staff and subject-matter expert interviews and surveys, among others. Bidders should describe their proposed primary data collection activities, including sampling approaches and timing, that will support efficient, high quality, and timely program feedback that enables CalMTA to improve the RHP and Induction Cooking MTIs' effectiveness in the market. Bidders are encouraged to recommend modifications to CalMTA's preliminary evaluation plan where they believe changes are warranted.

Key deliverables for Task 3 include:

- Draft and final sampling plans
- Draft and final data collection instruments
- Data files

Task 4: Evaluate market progress

Task 4a: Estimate market adoption

Determining units of adoption is a key focus of the evaluation because defensible measurement is essential for estimating the incremental energy impacts of each MTI (product definitions are included in the RHP and Induction Cooking MTI Plans, linked in the Supporting Documentation section below). Market adoption estimation is also one of the most challenging components of the evaluation because product supply chains often consist of multiple sales channels including retail brick-and-mortar stores, online storefronts, and direct-to-consumer sales, as well as wholesale purchase pathways for builders and property owners and managers. Bidders should describe their approach to developing a reliable estimate of market adoption, including the identification of data gaps and how the evaluator proposes to fill those gaps.

Task 4b: Evaluate MPIs

Because market share and adoption typically increase slowly and accelerate only after addressing critical market barriers, MTI progress cannot be appropriately addressed by assessing units of adoption alone. Instead, best practices in MTI evaluation require the evaluator to assess well-chosen short- and medium-term MPIs aligned with the logic model so managers can monitor market progress and ensure accountability from early to later stages of MTI implementation. Table 1 in the RHP and Induction Cooking Evaluation Plans lists the respective MPIs and their associated timeframes and milestones. CalMTA has vetted these MPIs with an evaluation advisory group and the CPUC. However, bidders may recommend changes to the MPIs they believe will enhance CalMTA's short- and medium-term monitoring of the RHP and Induction Cooking markets.

CalMTA completed baseline market characterization studies of the RHP and Induction Cooking markets that provide foundational data for several of the RHP and Induction Cooking MPIs. The evaluator will use the initial values from the market characterization reports to the extent possible and appropriate. For all other MPIs, the evaluator will establish baseline measurements during the

first year of the evaluation through targeted data collection activities. The evaluator will then track MPIs over time and note when measured MPIs do not follow expected trends, investigating potential causes for deviations and their implications for the MTI's theory of change.

Task 4c: Assess equity

CalMTA recognizes the historical inequities of energy efficiency investment and is using an equity lens in its approach to developing an MT portfolio that delivers benefits to environmental and social justice (ESJ) communities (for more information about ESJ communities, see link to An Equity Lens in the Supporting Documentation section below). Section 4.2 (Table 7) of the RHP and Induction Cooking Evaluation Plans shows the preliminary equity MPIs for the RHP and Induction Cooking MTIs, respectively, and the anticipated data collection activities for each. Where appropriate, the evaluator will use the same primary and secondary data collection sources and approaches to assess equity MPIs as they use to assess similar MPIs for the general population.

Bidders should explicitly describe how they will assess equity for the MPIs identified in the RHP and Induction Cooking Evaluation Plans and in other aspects of the MTIs they believe CalMTA should consider.

Task 4d: Assess causality

Causality assessment in MT programs is required to firmly link incremental adoption and other changes in the market to the MTI interventions. Effective causality assessment depends on an evaluation plan that anticipates the data and documentary sources needed for this critical part of the evaluation. The evaluator will review the RHP and Induction Cooking PTLMs' theorized linkages between MTI interventions and market outcomes, along with the RHP and Induction Cooking MPIs, to determine the data needed to assess causality in accordance with each MTI's theory of change. The evaluator will then conduct causality assessment based on a preponderance of evidence, gathering data from multiple primary and secondary sources.

Bidders should describe their approach to assembling and synthesizing evidence to assess causes of applicable market changes over time, including any expected areas of uncertainty.

Key deliverable for Task 4:

- Memoranda summarizing evaluator's approach to evaluating market adoption, market progress, equity, and causality, along with associated key findings, conclusions and recommendations

Task 5: Review forecasting, impacts, and cost effectiveness

Assessing incremental market adoption, associated impacts, and cost effectiveness are critical components of MTI evaluation. MTIs rely upon forecasting models to estimate these values over the MTI lifetime. During the RHP and Induction Cooking MTIs' development phase (Phase II of the MTI lifecycle), CalMTA developed forecasts for baseline market adoption (BMA), total market adoption (TMA), PA-verified units, and unit energy impacts.



CalMTA developed ex ante estimates of net incremental MTI impacts using this formula:

$$\text{Net Incremental MTI impacts} = [(TMA \text{ units} - BMA \text{ units}) * UEI] - PA \text{ verified impacts}$$

Bidders should describe their approach to reviewing CalMTA's market adoption and cost-effectiveness forecasts, including key inputs and associated data sources and assumptions for BMA, TMA, PA-verified impacts, and unit energy impacts (UEI). Bidders are strongly encouraged to review sections 2.6.2 and 2.6.3 of the [MTI Evaluation Framework](#) and Appendix B of the RHP and Induction Cooking MTI Plans, which provide important context for this task.

Key deliverable for Task 5:

- Memorandum summarizing findings and recommendations from review of CalMTA's MTI market adoption and cost-effectiveness model and forecast

Task 6: Conduct process evaluation

To identify opportunities to enhance MTI delivery and effectiveness, the RHP and Induction Cooking MTI evaluations will include a process evaluation component. Process evaluation activities will focus on how effectively CalMTA is implementing each MTI and why the MTI is or is not achieving its intended results. Note: CalMTA's preliminary evaluation plans for RHP and Induction Cooking omitted specific mention of process evaluation objectives, which are somewhat entwined with market progress research objectives; however, bidders should understand that process evaluation is an important part of the MTI evaluation scope.

Bidders should identify the research and evaluation activities they deem most important to assessing the RHP and Induction Cooking MTIs' delivery, which may vary year-to-year. In addition to general process evaluation objectives, bidders should recommend equity-specific research objectives and describe their approach to fulfilling those objectives. The RHP and Induction Cooking process evaluations will result in timely, actionable recommendations for improving program delivery.

Key deliverables for Task 6 include:

- Timely memoranda, as warranted, describing key process evaluation findings, conclusions, and recommendations that enable CalMTA to make appropriate, well-informed mid-cycle MTI implementation adjustments
- Memorandum summarizing evaluator's process evaluation approach and key findings, conclusions and recommendations

Task 7: Reporting

The evaluator will produce reports annually documenting evaluation findings and progress toward market transformation goals for each MTI. Reporting format may vary by year and could include a written report, memo, or slide deck, depending on the scope and nature of evaluation



activities completed during that period.

Bidders should describe their proposed approach to evaluation reporting for the first three years.

Key deliverables for Task 7 include:

- Ad hoc memoranda recommending timely improvements to the implementation of the RHP and Induction Cooking MTIs
- Draft and final annual Market Progress Evaluation Reports
- Three presentations of findings (with similar content) annually to: (1) the CalMTA MTI and Leadership Team; (2) the CalMTA Market Transformation Advisory Board (MTAB); (3) stakeholders

4 RFP and evaluation schedule

Key Dates	
RFP release: combined for RHP MTI and Induction Cooking MTI evaluations	Monday, July 27, 2026, noon (12 p.m.) PT
Pre-bid webinar	Monday, August 10, 2026, 1 p.m. PT
Intent to bid form due	Wednesday, August 12, 2026, 6 p.m. PT
Question and answer period closes	Friday, August 21, 2026, 6 p.m. PT
Proposals due	Monday, August 31, 2026, noon (12 p.m.) PT
Bidder presentations/interviews	Week of September 21, 2026
Bidder selection	Week of September 28, 2026
Contract negotiations	October 2026*
RHP MTI evaluation launch	Monday, November 2, 2026*
Induction Cooking MTI evaluation launch	January 1, 2027*
RHP Year-1 Market Progress Evaluation Report due	December 31, 2027
Induction Cooking Year-1 Market Progress Evaluation Report due	March 31, 2028
* Date may change. Bidders should use this date for the purposes of their proposals.	

5 Budget and cost proposal

The Study Team anticipates the three-year evaluation budget for the RHP MTI, exclusive of sales data purchases, will not exceed \$800,000, and the three-year evaluation budget for the Induction Cooking MTI will not exceed \$700,000. CalMTA encourages bidders to identify any potential data collection synergies or points of coordination between the RHP and Induction Cooking evaluations and their associated effects on the bidder's cost proposal.

The cost proposal spreadsheet for this RFP can be found in Attachment 1. Bidders must follow all instructions in that sheet. Any submission that does not include a completed Cost Proposal Sheet



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will be disqualified.

6 Submitting an intent to bid

Each firm (or team) that intends to submit a proposal must start the process by first submitting an intent to bid. Firms/teams 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 Open Solicitations webpage at: [Open Solicitations - CalMTA \(https://calmta.org/open-solicitations/\)](https://calmta.org/open-solicitations/).

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 CalMTA's Program Services Agreement. Any proposed redlines to the Program Services Agreement terms must be submitted with the bidder's proposal documents. Bidders may also choose to submit a "Statement of No Exceptions" in lieu of redlines to the Program Services Agreement. (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. CalMTA will not consider exceptions to the NDA. After a bidder submits its intent to bid, the bidder will receive the NDA for DocuSign via email. The recipient may reassign the DocuSign to the desired signatory. Once the NDA has been signed, CalMTA will send the Program Services Agreement via email.

8 Question & answer period

All bidder questions or requests for clarifications must be submitted through the CalMTA RFP portal. Questions can be submitted at any time before 6 p.m. PT on August 21, 2026. CalMTA will strive to respond within 48 hours, with answers for all bidders posted on the portal.

9 Proposal submission

Bidders may submit proposals to evaluate either the RHP MTI or the Induction Cooking MTI, or both. Bidders interested in evaluating both the RHP and Induction Cooking MTIs must submit



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separate proposals for the evaluation of each initiative.

Bidders must submit all required RFP response documents via the CalMTA Solicitation Portal by the due dates specified in the RFP Schedule (see Section 4). To access the Solicitation Portal, visit the CalMTA Open Solicitations webpage at: [Open Solicitations - CalMTA](https://calmta.org/open-solicitations/) (<https://calmta.org/open-solicitations/>).

The following attachments are included in this RFP:

- Attachment 1: Cost Proposal Sheet
- Attachment 2: CalMTA NDA
- Attachment 3: CalMTA RFP Supplier Questions
- Attachment 4: Conflict of Interest Certification Form

Each proposal submission must be under 25 pages total (excluding work samples and team member resumes). Pages submitted beyond the 25 pages will not be included in the scoring. Complete and compliant proposals will include the following documents:

1. Proposal response document(s) (PDF format), *one per MTI* if bidding on both, including:
 - a. **Company background and qualifications:** Bidders must describe their company's background and experience successfully evaluating energy-efficiency programs that are similar to the MTI evaluations they are bidding on. Where applicable, bidders must provide examples of work evaluating equity in energy-efficiency programs with ESJ communities, multifamily or affordable housing stakeholders, community-based organizations, or other partners serving ESJ communities. This information must also be provided for each subcontractor (if applicable). The prime contractor must also describe any previous work it has conducted with subcontractors on their team.
 - b. **Approach to evaluation tasks:** Bidders must provide a detailed description of the approach and methodologies they propose for each evaluation task and how they will manage these tasks. Bidders must also demonstrate how their proposed approach will lead to data-driven, rigorous and strategically focused theory-based market, impact and process evaluations that provide the MTIs with "real time" feedback to improve program delivery. CalMTA encourages bidders to propose innovative and creative solutions in each task. Whenever possible, bidders should describe examples of where they have successfully conducted similar program assessments.
 - c. **Project timeline:** Bidders must provide a Gantt chart, supplemented by any additional narrative information, with the proposed timeline for key milestones and deliverables associated with each Task.
 - d. **Work samples:** Bidders must provide at least three examples of past work relevant to the evaluation tasks described above, including samples of deliverables from past evaluation of MT programs. Narrative descriptions of relevant work experience must



- be included in the company background and prior work experience section.
- e. **Project team and management approach:** Bidders must describe their team structure, including subcontractors, with roles, responsibilities, and past experience defined for key personnel who will support each evaluation task. For any team that includes subcontractors, bidders must describe how individual firms' contributions will be managed to ensure accountability. Resumes for all key personnel must be included. If bidders intend to hire personnel, bidders must indicate the positions they will be filling. Proof of CPUC Supplier Clearinghouse certification, or other diverse supplier certifications, must be provided for any diverse firms on the team.
 2. Attachment 1: Completed Cost Proposal Sheet; *one per MTI* evaluation, if bidding on both. If bidding on both MTI evaluations, and bidder can offer discounted pricing due to economies of scale, please indicate this in the "Notes or Clarifications" section at the bottom of the Cost Proposal Sheet.
 3. Attachment 2: Completed and signed CalMTA Nondisclosure Agreement (NDA); must only sign this document once whether bidding on one or both MTI evaluations.
 4. Attachment 3: Completed CalMTA Supplier Questions sheet; *one per MTI* evaluation, if bidding on both.
 5. Attachment 4: Signed and completed Conflict of Interest Certification form; *one per MTI* evaluation, if bidding on both.
 6. Exceptions to Program Services Agreement or No Exceptions Statement; if bidding on both MTIs, upload duplicate copies to the RFP portal.

Bidders whose submittals are found to be deficient may be allowed to remedy the deficiency, at the discretion of CalMTA staff. An example of a correctable deficiency is missing or incomplete data entered into the solicitation platform, or a potential conflict of interest that needs to be investigated further.

Examples of deficiencies that may not be remedied at a later point are submittals that exceed word or page counts or are missing required documents. The CalMTA Team will notify bidders of any deficiencies and whether they will be allowed to correct the deficiency. Bidders must address any correctable deficiencies within two business days of notification by CalMTA.

10 Proposal evaluation criteria and selection

Proposals will be evaluated based on overall responsiveness to the RFP and these specific criteria:

1. Expertise/experience of firm and proposed team with energy-efficiency program evaluation, specifically with evaluating MT programs and equity
2. Understanding of the study scope and proposed approach to conducting the work
3. Proposed cost estimate
4. Proposed schedule/timeline
5. Diverse partner inclusion. Bidder and/or partner firms meeting CPUC Supplier



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Clearinghouse ([as certified by the CPUC Supplier Clearinghouse](#)) requirements for diverse supplier participation, or providing other certified diverse supplier representation, and demonstrating that certified diverse suppliers hold material responsibilities with an adequate share of the project budget.

CalMTA will also assess bidders' stability/financial risk using information bidders provide on the Financial-Risk Info tab in Attachment 3.

11 Bidder eligibility

A firm is ineligible to participate in any solicitation for MTI evaluation services if it, any of its contractors, subcontractors, or consultants bidding with the firm: (1) has performed MTI or energy efficiency program implementation work that targets the same market as the evaluation services that are the subject of the solicitation, and (2) such prior work was performed during the period that commences two years prior to the potential effective date of evaluation services resulting from the solicitation.

For example, a firm that is currently implementing a residential induction cooking program in California would not be eligible to bid on evaluation services for the Induction Cooking MTI, since that would be considered the same market. But if that firm stopped implementing the induction cooking program at least two years before the expected start date of the evaluation services, then the firm would be eligible to bid.

One exception to the above is that bidders with such a conflict 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 CPUC Staff.

Bidders must disclose any potential conflicts in Attachment 4 (Conflict-of-Interest Certification), which will be reviewed as part of the proposal intake process. Bidders that have a disqualifying conflict will be notified of such within two weeks of RFP close.

Active members of the CalMTA team (Resource Innovations and its subcontractors) are ineligible to participate as bidders in CalMTA competitive solicitations. Former members of the CalMTA team (Resource Innovations and its subcontractors) are eligible to participate as bidders in CalMTA competitive solicitations for any MTIs they did not work on; however, if the former member worked on the development, implementation, or evaluation of an MTI, they are ineligible to participate as a bidder on any solicitations related to that MTI unless the work they performed as a member of the CalMTA team ended at least two years prior to the potential effective date of services for the MTI they are bidding on. The work-ended date will be determined by the most recent date of billable work performed.

Members of CalMTA's MTAB are ineligible to receive funding from CalMTA, either directly or



indirectly (e.g., as subcontractors). Direct or indirect funding means that a) the member; b) an immediate family member; c) the member's employer; d) a parent, affiliate, or subsidiary of the employer; or e) any business owned or operated wholly or in part by the member is in receipt of any CalMTA funding, outside of the stipend for MTAB service.

If an MTAB member participated in any MTAB discussions or provided any form of input to CalMTA about specific MT ideas after that idea advanced to Phase II Program Development, that member may not bid on any RFP related to that initiative.

Evaluation Advisory Group (EAG) members are subject to Conflict-of-Interest policies that are similar to those of MTAB members. EAG members should reference Attachment C in the Evaluation Advisory Group Charter for complete details on EAG Conflict-of-Interest policies.

12 Conflict of interest

Each bidder must complete and submit Attachment 4 (Contractor Conflict-of-Interest Certification). 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. CalMTA will strive to notify bidders within two weeks of RFP close.

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

13 Contractual considerations

CalMTA is a program of the CPUC and is administered by Resource Innovations under a contract with Pacific Gas & Electric Company (PG&E) with direct oversight by staff from the CPUC Energy Division. The selected bidder will be required to enter a formal subcontract with Resource Innovations, governed by the provided terms and conditions and negotiated scope of work.

The initial contract term for the RHP MTI evaluation is from the date of contract execution through December 31, 2029; the initial contract term for the Induction Cooking MTI evaluation is from the date of contract execution through March 31, 2030. Both evaluations will have potential annual contract extensions through December 31, 2031.

CalMTA has the right to accept or reject any proposals received and may negotiate with the selected prime consulting firm to finalize the terms of the engagement. Any proposed redlines to the contract terms and conditions must be included with proposal documents. The number of redlines included will be factored into the "risk management" evaluation criteria.



14 Supporting documentation

The list below provides hyperlinks to relevant publicly posted documents related to the RHP MTI and the Induction Cooking MTI that contain information pertinent to the evaluation.

14.1 Overarching supporting documentation

- [MTI Evaluation Framework](#)
- [An Equity Lens](#)

14.2 RHP MTI supporting documentation

- [Room Heat Pumps MTI Plan](#)
- [Appendix A: Logic Model](#)
- [Appendix B: Market Forecasting & Cost-Effectiveness Modeling Approach](#)
- [Appendix D: Market Characterization Report](#)
- [Appendix F: Evaluation Plan](#)

14.3 Induction Cooking MTI supporting documentation

- [Induction Cooking MTI Plan](#)
- [Appendix A: Logic Model](#)
- [Appendix B Market Forecasting & Cost-Effectiveness Modeling Approach](#)
- [Appendix D: Market Characterization Report](#)
- [Appendix F: Evaluation Plan](#)

15 Pre-bid webinar

CalMTA will conduct a virtual pre-bid webinar for interested parties to learn more about the opportunity. The webinar will provide an overview of the RFP, scope of work, and key dates, in addition to allowing participants to ask clarifying questions that may assist them in determining if they are interested in pursuing this opportunity. Participants will have the ability to anonymize their names before joining the webinar, to remain hidden from other attendees. Questions can also be submitted anonymously via the chat feature. Zoom webinar registration information will be posted to CalMTA's website in advance. Following the webinar, CalMTA will post a recording of the pre-bid webinar and summary of questions and answers on the RFP webpage.

16 Bidding team & policies

Bidders may be composed of an individual firm or a team of firms. When bidding as a team, there must be an identified prime contractor. Prime contractors must submit the intent to bid and



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required proposal response documents. Bidder teams are required to bid on all evaluation tasks for the RHP MTI and/or all evaluation tasks for the Induction Cooking MTI included in this RFP.

17 Cost proposal

The cost proposal spreadsheet for this RFP is included as Attachment 1. Bidders must follow all instructions in that sheet. Any submission that does not include a completed Cost Proposal Sheet will be disqualified. If bidding on both MTIs, bidder must submit a separate cost proposal sheet for each MTI. If bidding on both MTIs and there are economies of scale or discounts in pricing based on the award of both projects, denote that in the individual cost proposal sheets.

18 Bidder presentations/interviews

Top bidders will be invited to participate in the online presentation and will receive a minimum of one week's notice to prepare for the presentation.

