



Project Submission Form Questions

Prepare your answers in advance, then fill out the form online at calnext.com/how-to-participate/#project

Please note, all fields are required.

PROJECT TEAM INFORMATION

1. Submission Date [Select Date]
2. Project Name [Open Field]
Please limit the Project Name to 5 words or less.
3. Company or Organization Name [Open Field]
4. Submitter Name [Open Field]
5. Title [Open Field]
6. Phone Number [Open Field]
7. Email Address [Open Field]
8. Is this the first time you have submitted this project or idea? [Dropdown: Yes | No]
9. Project Submitter Type [Dropdown: Manufacturer | Entrepreneur | National Laboratory | Utility/Program Administrator | Other]
- 9a. If Other selected, please describe. [Open Field]
10. Have you or your team reviewed available websites and resources to ensure the proposed project research is not duplicative? [Dropdown: Yes | No]
- 10a. If available, please provide names and links of recently completed studies related to this project. [Open Field]
Studies should be completed in the last three years or be the most recently completed work.



PROJECT DETAILS

11. Please provide a brief description of the proposed project that will serve as the public description of the project. [Open Field]

Make sure to describe the technology or technology deployment method being researched including what it does and why it is unique. This is a good place to include the research question/hypothesis. Your description must be 500 words or less and will be publicly displayed on the CalNEXT website if your Project Plan is approved.

12. Is the solution/technology available in the market today? Which best describes the current state of the solution? Check all that apply. [Checkbox: It is commercially available | It has finished conducting field demonstration(s) | It has finished conducting lab demonstration(s) | It has completed prototype development | Not sure]

13. Please describe the target market sector applicable to this technology. [Open Field]

For example, Residential, Multifamily, Commercial, Hard to Reach (HTR) customers, Disadvantaged Communities (DAC), Commercial, Industrial, Agricultural, Other

14. Which type of research most closely aligns with this proposed project?

[Dropdown: Market Characterization/Study | Measure Development/Enhancement | Lab Demonstration | Field Demonstration | Scaled Field Deployment | Tool Development/Enhancement | Behavioral Study | Test Standard Development]

TPM / PORTFOLIO PRIORITY

15. Which technology area does this proposed project most closely align?

[Dropdown: Heating Ventilation Air Conditioning (HVAC) | Plug Loads & Appliances | Process Loads (Commercial, Industrial, Agriculture, and Water) | Lighting | Whole Buildings | Water Heating]

16. How does the proposed project align with the Technology Priority Maps? If it does not align, please explain why this project should be a priority. [Open Field]

Please specifically describe what opportunities and barriers stated in the TPMs your project is looking to address. For more information and to review the TPMs, please visit:

calnext.com/resources/#tpm



BENEFITS

17. How does the project benefit utility programs with electrification, load flexibility, new measures, and savings for utility programs? [Open Field]

If there are specific utility programs your project might support, please include the names of the programs and explain if the benefit is direct or indirect and why.

18. How does the project advance state priorities for decarbonization by reaching Hard-to-Reach (HTR) customers and Disadvantaged Communities (DAC)? [Open Field]

State if your project is located in a Disadvantaged or Hard-to-Reach community. Describe how and explain what percent of the project funding will be spent in these communities. Is there project funding for disadvantaged workers? Will this project reduce customer energy burden? How will the project seek input/engagement from these communities?

QUALITY OF PROJECT / IDEA

19. What is the scope for the project? [Open Field]

As appropriate, what work you will do as part of this project, including number of sites, the type of data being collected, how work will be done and to what level of detail, etc.

20. What are the expected outcomes of the project? [Open Field]

Be explicit: include long term and short term outcomes, describe how the research project may lead to increased adoption of the subject technology, and provide clear description for what will do to ensure these outcomes can be achieved.

21. Once approved, roughly how long will it take to complete the project and all the required project deliverables? [Dropdown: 3 months | 6 months | 9 months | 12 months | 18 months | 2 years]

Project should start within 6 months of submitting this form; if not possible, please email info@calnext.com

22. Please explain the business case and justification for the project. If the project will include measure/savings research and/or testing, please explain how. [Open Field]

Include why this is different from incumbent technology or completed research, what benefits there will be to customers, and any energy, carbon or demand reduction estimates. CalNEXT will consider innovative technology and/or innovative research; explain your justification for both. Please include calculation/justification for estimates. If there is a sense of urgency (program need) in achieving the outcomes associated with this project please explain.



23. Please describe what you know about the market landscape, potential barriers, and paths to engage the market. Does the project include research to address these items? If so, how? [Open Field]

Please reference sources of market scan or research and share methodology of these assumptions. Consider who this technology is for, how you know it is wanted/needed, and how it might be adopted by this market.

24. Explain how you will successfully deliver the project. Who are the critical project partners that you will be including to support you with the work? [Open Field]

Identify team members such as manufacturer, another consulting firm, lab or local California-based customer(s) you might use for a demonstration or deployment project, etc. What capabilities does your organization already have, and what do they need to build or find in others. How will you address critical dependencies? Share as much as you can to help us understand how you will deliver this project cost effectively and within the timeframe.

COST

25. Please indicate the approximate funding needed from the program, including required report writing, incentives for customer participation and field installations. [Dropdown: Up to \$50,000 | Up to \$100,000 | Up to \$200,000 | Up to \$300,000 | Up to \$400,000]

26. Is there any co-funding that will contribute to funding this proposed project? [Dropdown: Yes | No]

26a. If Yes to the above question, will it be from any of the following sources: CEC, EPIC, DOE, GET or DRET? [Dropdown: Yes | No]

27. Do you have any questions or concerns about completing a CalNEXT project? If so, what are they? [Open Field]

28. Please upload additional documentation with more project details that would help the team better understand your project and its benefit to the energy efficiency programs. [Upload files]

29. Who referred you to submit this proposal? (Name and organization) [Open Field]

30. Please read the CalNEXT **Terms of Use** and accept them below to complete your submission. [Required checkbox: I accept the CalNEXT Terms of Use.]