



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 6 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 SUMMARY

- 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.** Does the proposed project include performance evaluation of products for which the submitter might benefit from the sale of the product?

[Dropdown: Yes | No]

CalNEXT research projects must be manufacturer-agnostic. Proposed projects which conduct research on a product/technology that the project team has intellectual property rights for or is an invested stakeholder of, its selection will be contingent upon being matched with a CalNEXT Program Partner to protect the research and analysis from bias. The CalNEXT Program Partner's role could include validating the research methodology and overseeing or executing the testing conducted on the project. Please note that if your project is selected to move forward, you will be asked to revise the scope to include the CalNEXT Program Partner including potential budget reallocation. By proceeding with this submission, you are acknowledging the above contingency. Failure to disclose manufacturer bias will result in your submission being disqualified.

- 13.** 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]

- 14.** 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

- 15.** 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]

- 15a.** How might your project support energy efficiency programs?

[Dropdown: Support existing workpaper | Support new/updated workpaper development | Support new/updated custom measure | Case study development | Support existing measure | Technology program support | I don't know | Other]

TPM ALIGNMENT

- 16.** 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]

- 17.** 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 call out the Technology Research Area listed in the TPM and specifically describe which opportunities, barriers, and Research Initiatives stated in the TPMs, your project is looking to address. For more information and to review the TPMs, please visit: <https://calnext.com/resources/#tpm>

PROJECT VALUE AND IMPACT

- 18.** How does the project benefit utility programs with electrification, load flexibility, new measures, and savings for utility programs?

[Open Field]

Discuss benefits to efficiency portfolios, load flexibility, grid decarbonization, expected kWh/kW savings, Total Resource Cost (TRC), and Total System Benefits (TSB) as appropriate.

- 19.** How does the project benefit Hard-to-Reach (HTR) utility 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. Describe project outcomes that will directly benefit DAC/HTR communities, including expected reduction in customer energy burden. How will the project seek input/engagement from these communities? How will the outcomes of this work uniquely benefit HTR/DAC communities?

- 20.** Briefly summarize the current market landscape for the subject technology (manufacturers, distributors, retailers, installers/contractors/technicians, customers, existing programs & incentives, etc.). Include known barriers prevent these market actors from adopting the technology and who should be engaged to overcome the known barriers. If the project includes research to address these items, explain.

[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. Identify any existing programs that can support scaling this technology.

- 21.** 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. Specify the targeted Research Initiative topic, which must be listed as "Immediate Need" in the relevant TPM. 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 (i.e. a program need) in achieving the outcomes associated with this project please explain.

PROJECT DETAILS

- 22.** What is the scope for the project?

[Open Field]

As appropriate, describe 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.

- 23.** 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. Activities may include but are not limited to supplying data for a new measure package, incorporate recommendations into a new or existing EE program. Provide a clear description for how to ensure these outcomes can be achieved.

- 24.** How will this project engage with relevant stakeholders during the project?

[Open Field]

List identified stakeholders and proposed engagement, or how stakeholders will be identified and engaged throughout the project.

- 25.** Once a Project Plan is approved, roughly how long will it take to hat is the timeframe to complete the project and all the required project deliverables?

[Dropdown: 3 months | 6 months | 9 months | 12 months | 18 months | 2 years]

26. 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]

State what organization will lead the project, and identify team members such as the 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.

27. What San Diego Gas & Electric, Southern California Edison, or Pacific Gas & Electric company energy efficiency or decarbonization programs do you expect to be impacted from this research?

[Open Field]

COST

28. 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]

28a. Please provide a rough breakdown of cost items.

[Open Field]

29. Is there any co-funding that will contribute to funding this proposed project?

[Dropdown: Yes | No]

29a. If Yes to the above question, will it be from any of the following sources: CEC, EPIC, DOE, GET or DRET?

[Dropdown: Yes | No]

30. 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]

SUBMIT

31. What questions or concerns do you have about completing a CalNEXT project?

[Open Field]

32. Who referred you to submit this proposal (Name and Organization)?

[Open Field]

Please read the CalNEXT **Terms of Use** and accept them below to complete your submission.

[Required checkbox: I accept the CalNEXT Terms of Use.]