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. Are you a CalNEXT program partner? [Dropdown: Yes | No]
   CalNEXT program partners are Energy Solutions, TRC, AESC, University of California-Davis, VEIC and the Ortiz Group.

3a. If yes, are you submitting on behalf of another company? [Dropdown: Yes | No]

4. Company or Organization Name [Open Field]
5. Submitter Name [Open Field]
6. Title [Open Field]
7. Phone Number [Open Field]
8. Email Address [Open Field]
9. Is this the first time you have submitted this project or idea? [Dropdown: Yes | No]
10. Project Submitter Type [Dropdown: Manufacturer | Entrepreneur | National Laboratory | Utility/Program Administrator | Other]

10a. If Other selected, please describe. [Open Field, 50 word limit]

11. Did this proposed project originate from or involve collaboration with an IOU? [Open Field]
    If yes, please list the IOU. If no, enter 'N/A'
12. Have you or your team reviewed available websites to ensure the proposed project research is not duplicative? [Dropdown: Yes | No]

12a. 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

13. Please provide a brief description of the proposed project that will serve as the public description of the project. [Open Field, 100 word limit]

    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 100 words or less and will be publicly displayed on the CalNEXT website if your Project Plan is approved.

14. Does the proposed project include performance evaluation of products for which the submitter might benefit from the sale of the product? [Dropdown: Yes | No]

    Projects under the CalNEXT program needs to be manufacturer-agnostic. If your proposed project includes products for which you own the copy rights to or is an invested stakeholder of, its selection will be contingent upon being matched with a CalNEXT Program Partner to ensure fairness in the research and analysis. The CalNEXT Program Partner's role will include validating the research methodology and to oversee or execute 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 and include all or some of the costs in your proposed budget. To proceed with submission, you are acknowledging the above contingency. Failure to disclose manufacturer bias will result in your submission being disqualified

15. Is the solution/technology available in the market today? [Dropdown: Yes | No]

16. Which project type best fits your submission? [Dropdown: Technology Development Research | Technology Support Research | Focused Pilots]

    Technology Development Research: Early-stage technologies or products not currently available in the market — developing the commercial capability and improving their ability to generate energy savings or reduce energy consumption or demand.

    Technology Support Research: Market-ready technologies or products — addressing market barriers or developing the commercial capability to improve their ability to generate energy savings, reduce energy consumption or demand, or support new measures eligible for energy efficiency resource programs. Projects may address barriers like customer behavior, retro-commissioning, and operational efficiencies.

    Focused Pilot: [PLEASE DO NOT SELECT UNLESS INSTRUCTED]

17. Please describe the target market sector applicable to this technology.
    [Checkbox: Residential | Multifamily | Commercial | Industrial | Agriculture | Public Sector | Hard-to-Reach | Disadvantaged Communities | Other]

18. 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]

18a. How might your project support energy efficiency programs?
[Dropdown: Measure package revision | New measure package development | Support new custom measure development | Provide existing custom measure recommendations | Case study development | Measure study/recommendation | Technology/Program support | I Don't Know | Other]

TPM ALIGNMENT

19. Which technology area does this proposed project most closely align?
[Dropdown: Heating Ventilation Air Conditioning (HVAC) | Plug Loads, Appliances, and Lighting | Process Loads (Commercial, Industrial, Agriculture, and Water) | Whole Buildings | Water Heating | Portfolio Enhancement]

20. 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: **calnext.com/resources/#tpm**

PROJECT VALUE AND IMPACT

21. How does the project benefit utility programs with electrification, load flexibility, new measures, and savings for utility programs? [Open Field]
Discuss expected kWh/kW savings, Total Resource Cost (TRC), and Total System Benefits (TSB) as appropriate.

22. How does the project benefit Hard-to-Reach (HTR) utility customers and Disadvantaged Communities (DAC)? [Open Field, 250 word limit]
Indicate whether your idea meets DAC criteria (e.g., CalEnviroScreen percentile/AB 1550) and/or HTR characteristics (e.g., income, language, housing type, renters, SMB, rural, tribal). Describe how and explain what percent of the idea funding will be spent in these communities. Describe any planned investments in priority/population workforce (e.g., paid training, apprenticeships, local hire) and target counts. State the expected typical monthly bill impact ($/month) for target customers and the calculation method. Explain how you will collect input and share decisions with community partners (CBOs, tribes, tenant orgs), including languages offered, stipends for participation, and feedback loops. Identify specific, non-generic benefits to DAC/HTR (e.g., health/safety, resilience, split-incentive solutions for renters, indoor air quality, comfort, reliability, landlord/tenant protections). Note any barriers (e.g., trust, language, landlord consent, disability access) and concrete mitigations. Confirm the idea does not increase costs or barriers for DAC/HTR participants; if risks exist, describe safeguards.

22a. What is the percentage of funding spent in DAC/HTR communities? [Numeric Field]

22b. Please enter the number of DAC and HTR participants. [Numeric Field]

22c. If your project targets residential, please estimate the typical monthly bill impact. [Numeric Field]

22d. Please include any other relevant metrics on equity impact. [Open Field]

23. Briefly summarize the current market landscape for the subject technology (manufacturers, distributors, retailers, installers/contractors/technicians, customers, existing programs & incentives, etc.). Include known barriers that would 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.

24. 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 (i.e. a program need) in achieving the outcomes associated with this project please explain.

25. Select a pathway for how this project will achieve technology transfer to the EE portfolio. [Dropdown: Follow-up Project | CASE Advocacy and Code Readiness | Support New/Updated Custom Measure Development | New Measure Package Development | Measure Package Revision | Tool Development | Project Findings for EE Program Integration]

    Typically, this is through one of the following tech transfer pathways: Follow up project (project is a phase in a series of dedicated projects to address a hypothesis), CASE Advocacy and Code Readiness, Support New/Updated Custom Measure Development, New Measure Package Development, Measure Package Revision, Tool Development, or Project Findings for EE Program Integration.

25a. In this section, please outline which tech transfer pathway selected above this project will follow, and what your plan is to ensure the appropriate stakeholders are consulted throughout the project lifecycle to achieve technology transfer into the EE portfolio. Describe how your project will impact the EE portfolio, meaning how the findings/outcomes of this project will be utilized by stakeholders and integrated into the EE portfolio. [Open Field]

PROJECT DETAILS

26. 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.

27. 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, incorporating recommendations into a new or existing EE program. Provide a clear description for how to ensure these outcomes can be achieved.

28. How will this project engage with relevant non-IOU stakeholders during the project? [Open Field]
    List identified stakeholders and proposed engagement, or how stakeholders will be identified and engaged throughout the project.

29. Once a Project Plan is 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]

30. 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.

31. How do you expect this research to benefit San Diego Gas & Electric, Southern California Edison or Pacific Gas & Electric? [Open Field]

COST

32. 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 $75,000 | Up to $100,000 | Up to $125,000 | Up to $150,000 | Up to $175,000 | Up to $200,000 | Up to $225,000 | Up to $250,000 | Up to $275,000 | Up to $300,000 | Up to $325,000 | Up to $350,000 | Up to $375,000 | Up to $400,000]

32a. Please provide a rough breakdown of cost items. [Open Field]

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

SUBMIT

34. Is the project's success contingent upon certain conditions such as timing of the year/ season/weather conditions/resource availability/duration of data collection that may impact project duration? [Dropdown: Yes | No]

34a. Please explain the contingency and the mitigation plan. [Open Field]

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

36. For external participant project proposals, all external participants will be paired with a CalNEXT partner responsible for CalNEXT-specific administrative tasks. If you have a preference for CalNEXT partner for this project proposal, please rank your top three preferred partners. [Open Field]
    CalNEXT Partners: VEIC, Energy Solutions, TRC, AESC, The Ortiz Group, and UC Davis

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