

Suggestions on Scoring High with your Emerging Technologies Project Proposal

CalNEXT Innovation Nexus

August 26, 2026

Agenda

1	Introductions	5 min
2	About CalNEXT Scanning & Screening	10 min
3	Building a CalNEXT Proposal	15 min
4	Selection Process & Planning	10 min
5	Conclusion and Q&A	15 min

Presenters



Zoe Mies

Energy Solutions
CalNEXT TPM & S&S Lead



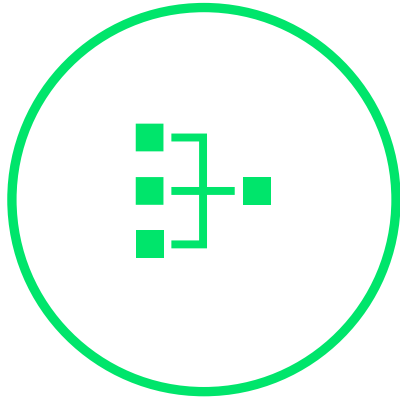
Tom Chase

VEIC
CalNEXT S&S Lead

CalNEXT Partners



About CalNEXT Scanning & Screening



Intake Process

Path to submit ideas for consideration



Prioritization Method

Evaluating submissions to prioritize projects that bring the most value to the program

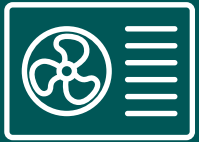


Portfolio Builder

Process for responsibly meeting program portfolio targets, on time and within budget

About CalNEXT Technology Priority Maps

CalNEXT's vision is to identify emerging technology trends and bring commercially available technologies to the energy efficiency program portfolio.



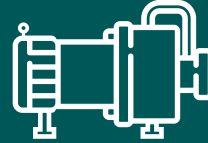
HVAC



Lighting,
Plug Loads
& Appliances



Portfolio
Enhancements



Process
Loads



Water
Heating



Whole
Buildings

Prioritization Matrix Summary

Major Considerations	Criteria	Weight
Project Impact/Value (60%)	TPM Priority	10%
	TPM Research Initiative Priority	10%
	Technology Transfer/Market Strategy	10%
	Utility Benefit	10%
	DAC/HTR Benefit	10%
	Project Innovation/Justification	10%
Project Execution (40%)	Project Clarity	10%
	Project Readiness	10%
	Stakeholder Engagement	10%
	Timeline	5%
	Cost	5%

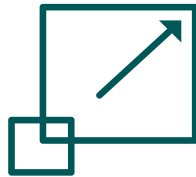
CalNEXT Portfolio Fit



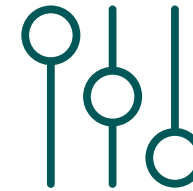
Annual Budget



**Annual Committed
and Expected Targets**



**Tech Transfer
Balance**



**Technology Area
Balance**

Building a Solid CalNEXT Proposal

- Conflict of Interest
 - 3rd party verification if there is a COI
- No existing measure or the measure needs an update
- Energy efficiency program need
 - Technology promises energy efficiency savings
- CalNEXT and national research gap
- Stakeholders across the market
- Commercialized technology

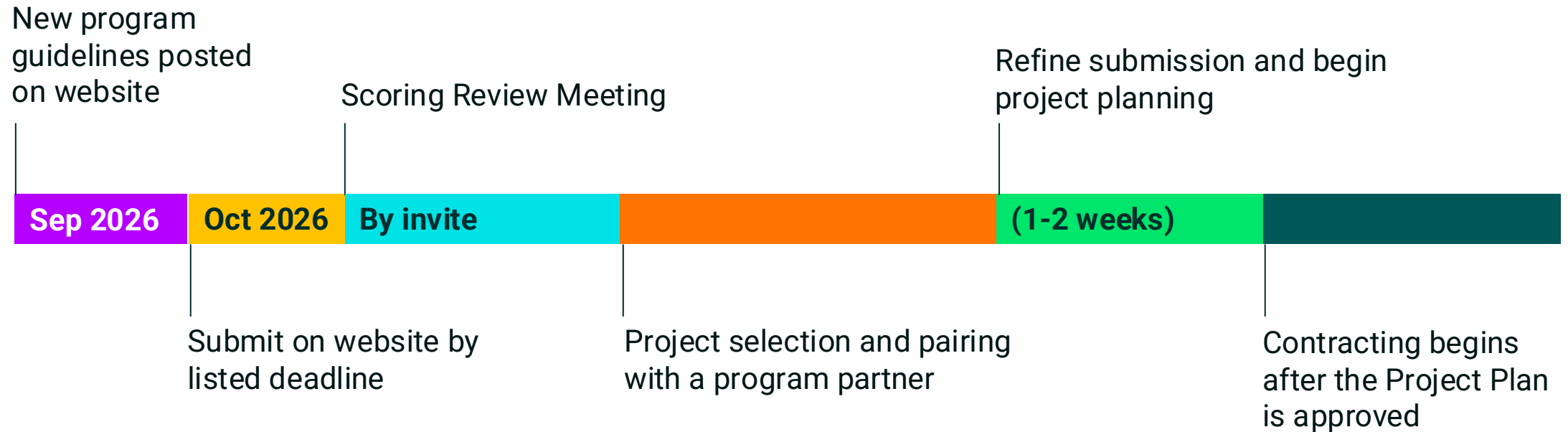


Post Selection Project Planning

- Timeline and budget
 - \$200k average selected project budget
- Project team composition
- Co-funding coordination
- Internal contracting and legal capacity



Project Selection Process



Additional Resources



How to Participate

calnext.com/how-to-participate



Tech Transfer

calnext.com/tech-transfer



Keep in Touch

calnext.com/keep-in-touch



Technology Areas

calnext.com/technology-areas



Approved Projects

calnext.com/approved-projects



Resources

calnext.com/resources

Key Takeaway

The goal is for every project to lead to **real-world impact**. Build savings, affordability, and technology transfer into the project framework from the outset through intentional planning, stakeholder engagement, actionable reporting, and a clear implementation pathway.



Discussion Prompts

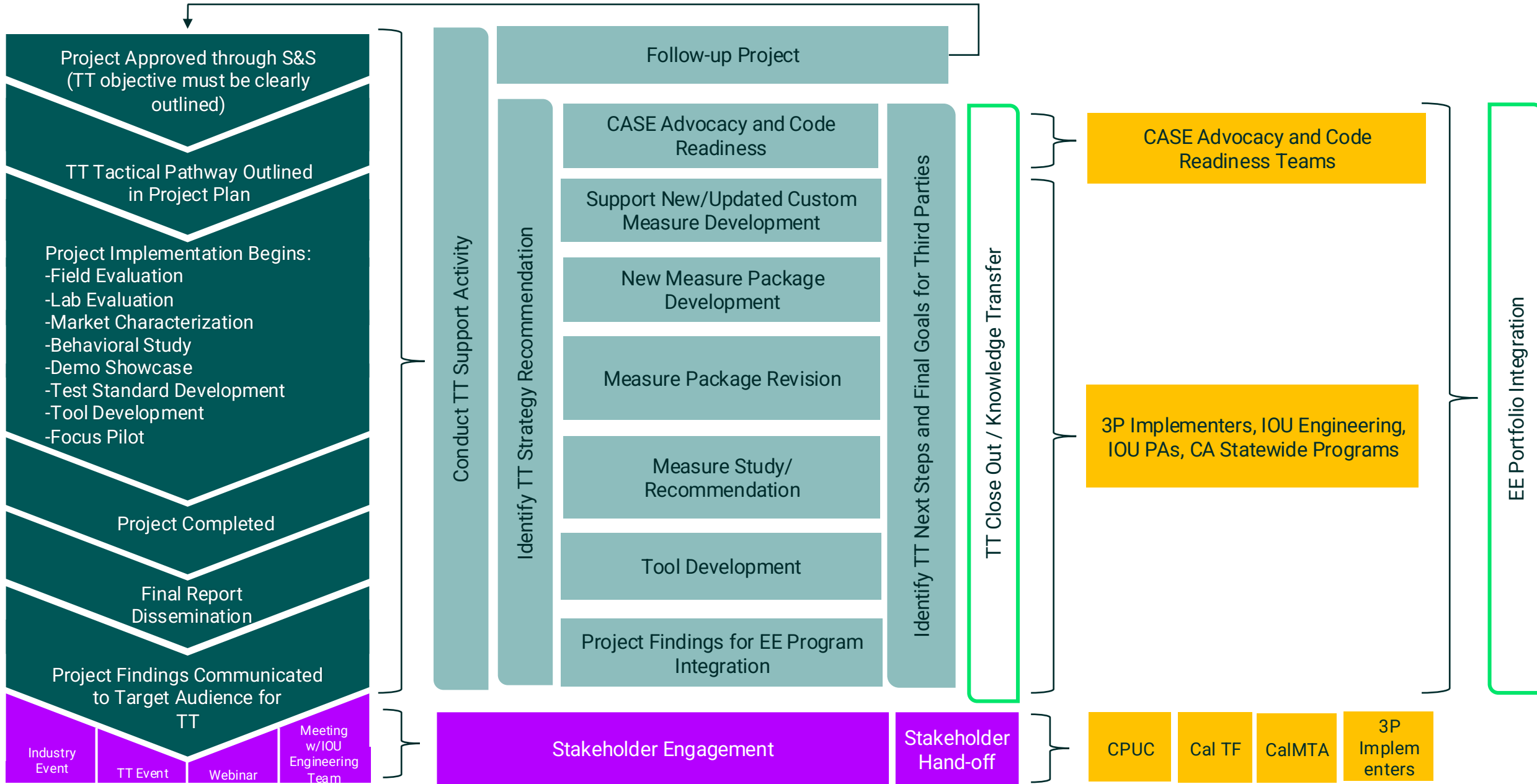
1. What barriers do you find most relevant when submitting a CalNEXT proposal?
2. What else about the process, that you don't currently see on the program website, would you like to know about CalNEXT project selection?
3. What external resources would be useful in creating CalNEXT proposals (state of CalMTA work, eTRM work, measures in development already, e.g.)?
4. What is the likelihood that you would be or are seeking co-funding for a CalNEXT proposal?



Thank You!

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Suggestions on Scoring High with your Emerging Technologies Project Proposal

Efficiency Program and DAC/HTR Benefits

Efficiency Program Alignment (10%)

- Meeting specific energy efficiency target
- Demand reduction during peak
- Load flexibility
- Grid decarbonization
- Reducing operating costs
- Efficiency portfolios

Disadvantaged Community (DAC) / Hard-to-Reach Community (HTR) Benefits (10%)

- Site located in DAC CalEnviro Screen area
- Works with CBOs and/or diversity advocates
- Develops outreach materials in many languages
- Utilizes diverse contractors
- Supports/utilizes workforce development programs
- Addresses impacts on vulnerable communities
- Engages with diverse working groups for feedback/partnership

Project Quality & Cost



Scope & Project Clarity (10%)

- What will you do?
- How will you do it?
- What do you expect to happen?



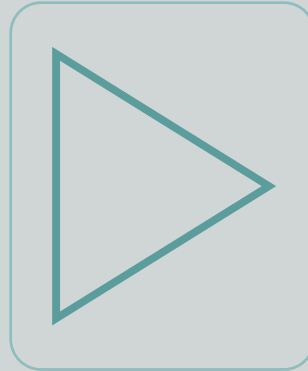
Justification/Innovation (10%)

- Why is this different from work that has been done?
- What is the estimated value of the contribution?



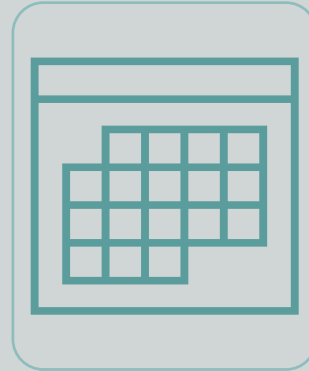
Stakeholder Engagement (10%)

- Who is this for?
- Who influences them?
- How do you know?
- How do you engage them?



Readiness (10%)

- How ready are you to start research?
- What resources and partners are in place?
- Why do you think you are positioned for success?



Timeline (5%)

- How long will it take to complete the scope?
- How does this compare to industry standards?



Cost (5%)

- How much will it cost to complete the scope?
- How does this compare to industry standards?