Project Submission Form 2027 Portfolio Questions

Revised as of October 21, 2026

1. **Submission Date** [Date Input Field]

2. **Project Name** [Open Field]
   (Prompt: *Please limit the Project Name to 5 words or less*)

3. **Are you a CalNEXT program partner?** [Single-select: Yes/No]
   (Prompt: *CalNEXT program partners are Energy Solutions, TRC, Franklin Energy, a.k.a AESC, University of California-Davis, VEIC, and the Ortiz Group.*)

3a. **[If "Yes"] Are you submitting on behalf of another company?** [Single-select: Yes/No]

Please indicate the approximate total funding needed from the program, including project administration, required report writing, incentives for customer participation, field installations, and any other project-related expenses. [Single-select: 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]
(Prompt: *CalNEXT approved projects are typically below $250,000 in requested costs.*)

4. **Company or Organization Name** [Open Field]

5. **Contact Name** [Open Field]

6. **Title** [Open Field, 50-word limit]

7. **Phone Number** [Open Field]

8. **Email Address** [Open Field]

9. **Is this the first time you have submitted this project or idea?** [Single-select: Yes/No]

10. **Project Submitter Type** [Single-select: 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 or involve collaboration with an IOU? If yes, please list the IOU. If no, enter 'N/A'.** [Open Field]

12. **Have you or your team reviewed existing CalNEXT, California, and national research to ensure the proposed project research is not duplicative?** [Single-select: Yes/No]
(Prompts: *Please check* **calnext.com/approved-projects** *for list of approved CalNEXT projects.*)

12a. **If available, please provide names and links for up to 10 recently completed studies, data or publications related to this project.** [Open Field]
(Prompt: *Studies should be completed in the last three years or be the most recently completed work.*)

NEXT: *PROCEED TO NEXT PAGE OF FORM*

PAGE 2 - PROJECT SUMMARY

13. **Please provide a brief description of the proposed project** [Open Field, 100-word limit]
(Prompt: *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 testing, evaluation, or performance assessment of a product, technology, or solution from which the submitter or their organization may directly benefit financially (for example, through product sales, licensing, ownership, or other commercial interests)?** [Single-select: Yes/No]

If "Yes", Do you accept the following terms?
CalNEXT projects must be conducted in a manufacturer-agnostic manner. If the proposed project includes a product, technology, or solution in which the submitter or their organization has a financial interest, selection of the project will be contingent upon collaboration with a CalNEXT Program Partner to help ensure the independence and integrity of the research. The CalNEXT Program Partner may validate the research methodology and oversee or conduct some or all project testing and analysis activities. If selected for funding, the submitter may be required to revise the project scope and budget to include the Program Partner's participation and associated costs. By proceeding with submission, you acknowledge and accept these conditions. Failure to disclose relevant financial or commercial interests may result in disqualification of the proposal. [Single-select: Yes/No]

15. **Is the solution/ technology available in the market today?** [Single-select: Yes/No]

16. **Which project type best fits your submission?** [Single-select: Technology Development Research, Technology Support Research, Focused Pilots]

(Prompt: ***Technology Development Research*** *- Early-stage technologies or products not currently available in the market — developing commercial capability and improving their ability to generate energy savings or create a permanent load shift to reduce peak demand.*

Technology Support Research *- Market-ready technologies or products — addressing market barriers or developing 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 Pilots *- [PLEASE DO NOT SELECT UNLESS INSTRUCTED])*

17. **Please describe the target market sector(s) applicable to this technology.**
[Multi-select: Residential, Multifamily, Commercial, Industrial, Agricultural, Public Sector, Hard-to-Reach, Disadvantaged Communities, Other]

18. **Which type of research most closely aligns with this proposed project?**
[Single-select: Market Characterization/Study, Measure Development, Measure Study/Recommendation, Lab Demonstration, Field Demonstration, Scaled Field Deployment, Tool Development/Enhancement, Behavioral Study, Test Standard Development]

19. **How might your project support energy efficiency programs?**
[Single-select: 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]

20. **Does your project align with an existing energy efficiency measure?**
[Single-select: Yes/No]

20a. **[If "Yes"] Please enter the eTRM Measure ID** [Open Field]
(Prompt: *Please refer to* caltf.org/new-measure-list *for the eTRM Measure ID*)

NEXT: *PROCEED TO NEXT PAGE OF FORM*

PAGE 3 - TPM ALIGNMENT

21. **Which technology priority map does this proposed project most closely align?**
[Single-select: Heating Ventilation Air Conditioning (HVAC); Lighting, Plug Loads & Appliances; Process Loads (Commercial, Industrial, Agriculture, and Water); Whole Buildings; Water Heating; Portfolio Enhancements]

21a. **Please choose the technology research area(s) under your selected TPM that best aligns with your project.**
If answer to 21 is "Heating Ventilation Air Conditioning (HVAC)" then [Multi-select: Room Heat Pumps; Commercial Air-to-Air Heat Pumps in Existing Buildings; Decarbonized Designs for Complex HVAC Systems; Commercial Installation, Operation & Maintenance; Hydronic Heat Pumps for HVAC; Residential Multifunction Heat Pumps; Residential Air-to-Air HPs and Controls; Thermal Energy Storage]
(For information on technology research areas under this technology area, please refer to calnext.com/technology-areas/hvac)

If answer to 21 is "Lighting, Plug Loads & Appliances" then [Multi-select: Electric Vehicle Supply Equipment (EVSE); Gas & Electric Household Appliances; Advanced Capabilities & Technologies in Controls & Integration; Advanced Approaches to Exterior Lighting; Medical Equipment; Electronics & Electrical Appliances]
(For information on technology research areas under this technology area, please refer to calnext.com/technology-areas/lighting-plug-loads-appliances)

If answer to 21 is "Process Loads" then [Multi-select: Controlled Environment Horticulture; Commercial Kitchens; Data Centers & Enterprise Computing;

Refrigeration, Commercial & Industrial; Advanced Motors; Pumping Systems; Process Air Systems; Process Heating Technology]
(For information on technology research areas under this technology area, please refer to calnext.com/technology-areas/process-loads)

If answer to 21 is "Whole Buildings" then [Multi-select: Integrated Systems; Electrical Infrastructure; Operational Performance; Envelope; Design & Construction; Community Scale Strategies]
(For information on technology research areas under this technology area, please refer to calnext.com/technology-areas/whole-buildings)

If answer to 21 is "Water Heating" then [Multi-select: Residential & Small Commercial Heat Pump Water Heaters; Commercial Domestic Hot Water System Design; Residential Multifunction Heat Pumps; Commercial Multifunction & Combination AWHPs]
(For information on technology research areas under this technology area, please refer to calnext.com/technology-areas/water-heating)

If answer to 21 is "Portfolio Enhancements" then [Multi-select: Energy Efficiency Success Opportunities; Affordability & Fuel Substitution; Integrated Demand Side Management (IDSM) & Load Flexibility; Low-Global Warming Potential (GWP) Technologies]
(For information on technology research areas under this technology area, please refer to calnext.com/technology-areas/portfolio-enhancements)

NEXT: *PROCEED TO NEXT PAGE OF FORM*

Page 4 – PROJECT VALUE AND IMPACT

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

23. **How does the project benefit Hard-to-Reach (HTR) utility customers and Disadvantaged Communities (DAC)?** [Open Field, 250-word limit]
(Prompt: *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.*)

23a. **If your project targets residential, please estimate the typical monthly bill impact** [Value]

23b. **Please include any other relevant metrics on equity impact** [Open Field]

24. **What are the primary barriers preventing adoption of the proposed technology in the target market? Briefly describe up to three key barriers and identify the stakeholders who would need to be engaged to address them. If the proposed project is intended to address any of these barriers, explain how.** [Open Field, 250-word limit]

25. **What makes this project innovative, and how could its outcomes be adopted or scaled by customers, contractors, utilities, or energy efficiency programs?** [Open Field, 200-word limit]
(Prompt: *Describe what differentiates the project from current technologies, practices, or research and identify any factors that would support or hinder broader adoption.*)

26. **Select a pathway for how this project will achieve technology transfer to the EE portfolio.** [Multi-select: Follow-Up Project, CASE Advocacy and Code Readiness, Support New/Updated Custom Measure Development, New Measure Package Development, Measure Study/Recommendation, Measure Package Revision, Tool Development, Project Findings for EE Program Integration]
(Prompt: *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, Follow-Up Project, Support New/Updated Custom Measure Development, New Measure Package Development, Measure Package Revision, Measure Study/Recommendation, Tool Development, or Project Findings for EE Program Integration. For details, please refer to* calnext.com/tech-transfer)

26a. **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.** [Open Field, 250-word limit]

PROJECT DETAILS

27. **What is the scope for the project?** [Open Field]
(Prompt: *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.*)

28. **What are the expected outcomes of the project?** [Open Field]
(Prompt: *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 of how to ensure these outcomes can be achieved.)*

29. **Once a Project Plan is approved, roughly how long will it take to complete the project and all the required project deliverables?** [Single-select: 3 months, 6 months, 9 months, 12 months, 18 months, 2 years]

30. **Identify the lead organization and key project partners. Describe each organization's role, responsibilities, and relevant capabilities. Include any critical dependencies and how they will be managed to support successful project delivery within budget and schedule.** [Open Field]

COST

31. **Please provide a rough breakdown of cost items.**
(Prompt: *Please refer to the sample submission form on the CalNEXT website for reference.*)

32. **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 (drag and drop)]

33. **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?** [Single-select: Yes/No]

33a. **[If "Yes"] Please explain the contingency and the mitigation plan** [Open Field, 250-word limit]

SUBMISSION

34. **Who referred you to submitting this proposal (Name and Organization)?** [Open Field]

35. **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 preferred CalNEXT partner for this project proposal, please rank your top three preferred partners. Profiles of the CalNEXT partners are on the CalNEXT website.** [Single-select: Energy Solutions; Franklin Energy (a.k.a. AESC); TRC Companies; University of California, Davis; VEIC; Ortiz Group; I don't have a preference]

Please read the CalNEXT Terms of Use and accept them below to complete your submission. [Single-select: I accept the CalNEXT Terms of Use]
(Prompt: *Find the Terms of Use at* calnext.com/terms-of-use)

PROCEED TO SUBMIT