

2023
Supporting
2022
Energy
Code

# Introduction to CABEC Mentoring Program



Gina Griffiths Rodda – Mentor Program Manager

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#### **OVERVIEW**

Oversight for the Certified Energy Analyst (CEA) Mentoring Program has been delegated to the California Association of Building Energy Consultants (CABEC). CABEC improves the practice of energy consulting by encouraging its members to participate in a continuing education program of professional development. The education program covers: The State of California's building energy regulations and analysis, energy conservation technologies, ethics, compliance documentation, and any relevant topics that will develop the professional standards of those engaged in energy consulting.

The goal of the CABEC Mentoring Program is to pair seasoned and certified CEAs who are also CABEC Members with individuals currently in pursuit of certification. The mentor will share experiences and practical knowledge to supplement the mentee's development while s/he completes the training and development programs that are available through Energy Code Ace (<a href="www.energycodeace.com">www.energycodeace.com</a>) and others. While the mentoring program is intended to be customized to the preferences of the mentorship pairing, it is structured around Monthly Mentoring Meetings, which are a series of courses and application activities tied to the five competencies covered in the CEA exam.

#### What is a Certified Energy Analyst (CEA)?

Certified Energy Analysts (CEA) are professionals who have studied and worked in the field of building energy efficiency and energy code compliance pertinent to the California Code of Regulations, Title 24, Part 6. They have passed an exam that represents an achieved level of professional competency. These experts can help individuals and businesses reduce their building energy needs and costs. This includes reducing the amount of energy used in residential and commercial buildings and switching to alternative energy sources such as solar. Most energy analysts apply their knowledge to serving a large region or possibly the entire state of California.

Practically speaking, In California, CEAs often determine which energy efficiency measures are needed to meet the state energy efficiency requirements and prepare the necessary energy code compliance documentation to submit as part of a builder's permit application. An energy analyst uses California Energy Commission–approved compliance software to identify the energy efficiency measures, including solar water heating, that would be most effective for a building. An energy analyst might also use certain tools such as the NSHP PV Calculator to evaluate the performance of a PV solar energy system.

#### What does it take to become a CEA?

The Certified Energy Analyst (CEA) program is a natural outgrowth of the CABEC Statement of Purpose and is officially recognized by the California Energy Commission for establishing a professional standard as well as providing an important link in energy compliance. The primary goal of the Certified Energy Analyst (CEA) program is to maintain and manage a professional credential for those who assist the building industry in meeting state energy standards.

The CEA certification program is designed to benefit energy analysts and their clients in the design and construction community by creating a consistent and recognizable standard of achievement. The CEA certification represents the energy analyst's level of knowledge, experience, and expertise and demonstrates a commitment to maintaining a high degree of professional excellence pertaining to the

Building Energy Efficiency Standards. Separate certification is offered for the Residential and Nonresidential Standards.

#### How does the mentoring program work?

Mentor interactions are the primary feature of the program that distinguish it from other educational offerings. Energy analysts embark on a varied program for developing the competencies needed for certification, with most activities being self-directed. Mentor interactions are planned at key points within each Monthly Mentoring Meeting, during or following a block of completed training. These interactions provide students with an opportunity to clarify and confirm any outstanding questions from the training, and to receive feedback and guidance from a certified energy analyst in a way that is tailored to the learner's needs.

There are many ways to customize mentoring interactions, including variations on the number of participants, frequency and timing of the interactions, and the information exchanged. Mentoring sessions may occur in person if participants are geographically close, or in a combination of telephone and online meetings, these are currently supported as online meetings. Mentors will need access to an online meeting platform to facilitate online interactions. In addition, mentors may require support materials for each interaction, including sample learning objectives, practice activities and exercises, and recommended review topics related to the coursework in each learning module. In most cases these have been created for you and are included in your coaching guides for each Monthly Mentoring Meeting.

Each Monthly Mentoring Meeting is designed to map to the CEA exam competencies. To facilitate mentorship in a structured way, each block offers suggested opportunities for analysts to meet with a mentor to touch base or debrief about a sample project they've been working on. For example, in the Modeling Block, analysts complete sample projects as a downloadable self-study. When they are complete with the project they'll debrief with their mentor.

# BENEFITS, ROLES, RESPONSIBILITIES OF A MENTORING RELATIONSHIP

Mentoring is a special partnership between two people based on commitment to the mentoring process, common goals and expectations, focus, mutual trust and respect. The mentoring relationship allows for the transfer of knowledge and skills from one energy consultant to others, thus benefiting the greater good.

Both the mentor and the mentee give and grow in the mentoring process. The mentee can learn valuable knowledge from the mentor's expertise and lessons learned, and competencies can be strengthened in opportunity areas. Mentees will have the opportunity to establish valuable connections with more experienced energy consultants. Mentors often find that they solidify their own knowledge in the process of preparing to share it with others.

The success of mentoring will depend on clearly defined roles and expectations in addition to the participants' awareness of the benefits of participating in the program.

#### Benefits of Mentoring for the Mentor:

- · Renews enthusiasm for the role of expert
- · Obtains a greater understanding of struggles of less experienced energy consultants
- · Enhances skills in coaching, counseling, and listening
- · Develops and practices a more personal style of leadership
- · Demonstrates expertise and shares knowledge
- · Personal satisfaction of sharing their skills and experience with a willing learner

#### Benefits of Mentoring for the Mentee:

- · Gains sharper focus on what is needed to grow professionally
- · Furthers development as a professional
- · Gains capacity to translate values and strategies into productive actions
- · Complements ongoing formal study and/or training and development activities
- · Gains career development opportunities
- · Gets assistance with ideas and honest feedback

As participants reflect on being mentored, time should be devoted to determining the qualities desired in a mentor and what you would like to gain from the partnership.

#### Responsibilities - Mentor:

- · Support CABEC's mission, vision, and goals
- Attend online 1-hour Monthly Mentoring Meeting including Mentoring Program Manager and all other mentors
  - o Commit to presenting, at least, one of the prescribed monthly training meetings per year
  - o One-on-one meetings (typically supported online or via phone calls) with mentee pods and engage in prescribed mentoring activities after monthly meetings
- · Willingly share your experience
  - o Explain how the Mentoring Program is structured
  - o Explain how Mentee Pods work
  - o Offer encouragement through genuine positive reinforcement
  - o Provide open and candid feedback
  - o Share lessons learned and stories from your own career
  - o Look for experiences that will stretch the mentee
- Let the Mentoring Program Manager at CABEC know as soon as possible if you are having a problem connecting with your mentee
- Estimated monthly time involvement is 4–6 hours per month.

#### Responsibilities - Mentee:

- Meet with mentor and engage in mentoring activities as prescribed
- · Discuss individual development planning with the mentor
- Attend (11) 1-hour Monthly Mentoring Meeting in addition to Mentor/Mentee pod training meetings as scheduled by the mentor
- · Be proactive about contacting your mentor and attending scheduled meetings
- Be prepared for every meeting and come with questions
  - o Respect the mentor's time and resources
  - o Review all mentoring documents that are you provided
  - o Mentors are very busy people and have generously volunteered to donate time
  - o Commit to self-development
  - o Seek advice, opinion, feedback, and direction from the mentor
  - o Assume responsibility for acquiring or improving skills and knowledge
- · Be open and honest on goals, expectations, challenges, and concerns
  - o Actively listen and ask questions
  - o Be receptive to constructive criticism/feedback
- · Maintain confidentiality
- Stay accessible, committed, and engaged during the length of the program. Understand that if mentee doesn't fully engage in all of the above, misses more that (3) consecutive meetings or chronically comes unprepared or doesn't attend online trainings the mentee may be asked to leave the program until such time the required commitment can be made. A meeting with the Program Director may be required.

- Provide candid feedback to the mentor on what is working or not working in the mentoring relationship
- Let the Mentoring Program Manager at CABEC know as soon as possible if you are having a problem connecting with your mentor

#### Responsibilities - CABEC Mentoring Program Manager(s):

- Maintain CABEC Mentoring Program materials
  - o Google Docs (or other as determined by CABEC Director) for materials utilized between CABEC and the mentor/mentee and between mentor and mentee(s); Monthly calendar supporting CABEC Mentoring Monthly Program Meetings; Suggested for coordination of Monthly Debrief and any other meetings between mentor and mentee(s)
  - o CABEC website for CABEC Mentoring Monthly Program Meeting PowerPoint slide decks and sample project material; CABEC Mentoring Program Handbook
- Pair mentor and mentees with consideration to active mentee pods and determine if any new pods are required
- Coordinate monthly CABEC Mentoring Program meetings to support Learning/Flight Paths.
   Additional monthly meetings may be required as the program grows and not all pods are
   following the same Learning/Flight Paths. Record these meetings and make available on the
   CABEC website in the mentoring location for mentors to review and be available for any
   mentees who could not attend
- Check in the mentors and mentees to confirm everything is going smoothly
- Support any mentee or mentor who is having issues with the CABEC Mentoring Program, mentor and/or any mentees within the program
- Communicate with the CABEC Executive Director and the CABEC Board on progress of the mentoring program and relay any needs or concerns of the program. Further coordination with Jill Marver of PG&E in tandem with the CABEC Executive Director and the CABEC Board to be provided as required

#### PROGRAM DOCUMENTS

The following documents are provided to support a smooth process and continuously improve the mentoring program. A full list of all training and development resources used during the mentoring process can be found in the Development Plan.

#### **General mentoring documents:**

- Introduction to CABEC Mentoring Program Overview of the mentoring program including expectations of mentee, mentor and mentoring program.
- Confidentiality and committment agreement Agreement that the mentoring program must be a safe environment for mentees and mentors to freely share information with one another. Additionally, is aware of the program attendance and participation requirements.
- **Evaluation (via survey)** At the end, mentees and mentors will be asked to evaluate the program. Their input will help make any necessary adjustments to ensure the program remains effective.

#### **APPENDICES**

Appendix A: Schedule Overview for Mentoring Program

Appendix B: Monthly Mentoring Program Meetings

Appendix C: Roadmap between CEA Exam Objectives and Flight Plan



## Appendix A: Schedule Overview

#### **Getting Started: Meet your Mentee(s)**

Who: Mentor and any new mentee(s) When: First meeting with mentee(s)

What: Introduce the mentee(s) to the mentor, the CABEC Mentoring Program, discuss goals, rules of

engagement, timelines and fill out initial paperwork

#### **Monthly CABEC Mentoring Program Meetings**

Who: Mentor who volunteered for this flight path topic/All Mentees/CABEC Mentoring Program Director

When: Monthly for 11 months of the year

What: Work through flights paths in order; link applicable training to that flight path from ECA to mentees,

use mentoring program example project(s) to facilitate application of what they should have

learned in previous month's ECA classes

#### **Monthly Debrief Pod Check-ins**

Who: Mentor/Mentee(s) pod

When: Monthly or as desired by pod

What: Mentees work on sample/personal projects with activities specific to each Flight Plan and then discuss

results and issues with the mentor and other mentees in pod

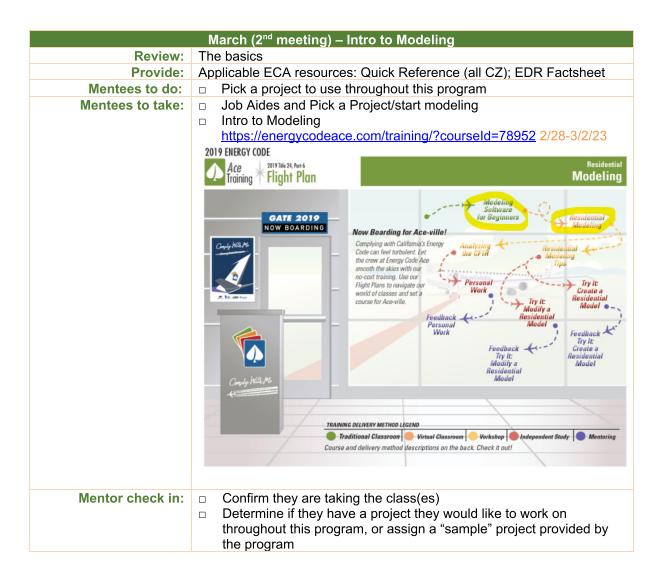
# Appendix B: Monthly Agenda's

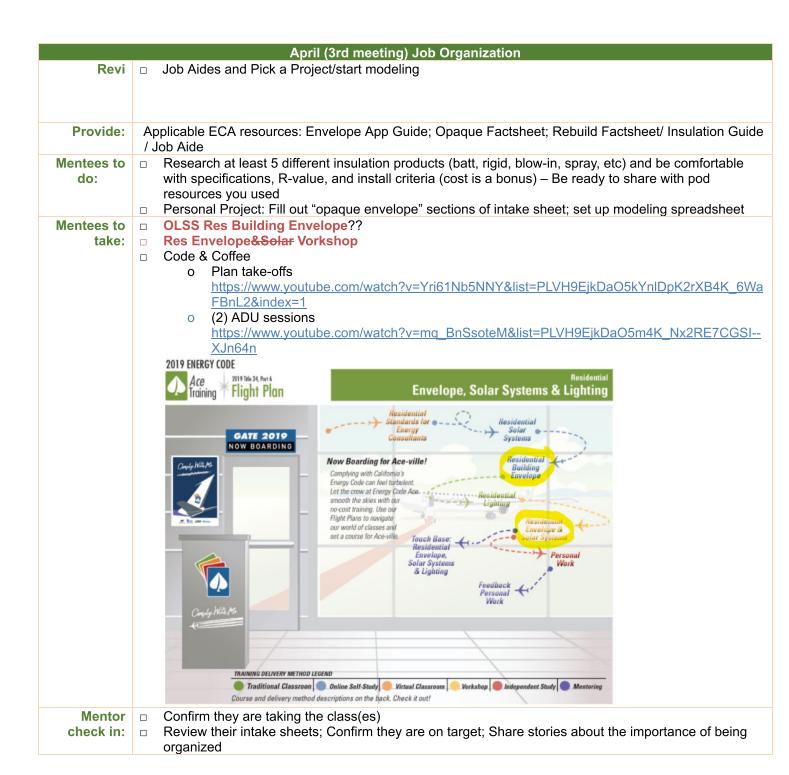
CABEC 2023 Code Mentoring Program Monthly Meeting Calendar

Month	Topic	Classes/Resources	Activity
February	Introduction	<ul> <li>Energy Efficiency Concepts online self study (OLSS) https://energycodeace.com/training/?courseld=15156</li> <li>Live Res Standards for Energy Consultants https://energycodeace.com/training/?courseld=67561 1/17-19/23</li> <li>Prepare for next month: Modeling Software for Beginners o Energy Pro https://energycodeace.com/training/?courseld=69609 2/14/23 or o CBECC-Res https://energycodeace.com/training/?courseld=25528 2/22/23</li> <li>Glossary https://energycodeace.com/resources/?itemId=35107</li> </ul>	N/A
March	Intro to Modeling	<ul> <li>Intro to Modeling         <ul> <li>https://energycodeace.com/training/?courseId=78952</li> <li>2/28-3/2/23</li> </ul> </li> <li>Drawing Basics such as         <ul> <li>https://www.youtube.com/watch?v=hNzfPII2AiY</li> </ul> </li> <li>COmpliance Pathway</li> <li>Quick Reference</li> </ul>	Pick a Project
April	Job Organization	<ul> <li>OLSS Res Building Envelope??</li> <li>Res Envelope&amp;Selar Vorkshop</li> <li>Code &amp; Coffee         <ul> <li>Plan take-offs</li> <li>https://www.youtube.com/watch?v=Yri61Nb5NNY&amp;list=PLVH9EjkDaO5kYnlDpK2rXB4K_6WaFBnL2&amp;index=1</li> <li>(2) ADU sessions</li> <li>https://www.youtube.com/watch?v=mq_BnSsoteM&amp;list=PLVH9EjkDaO5m4K_Nx2RE7CGSIXJn64n</li> </ul> </li> </ul>	Research insulation and use Job Aide to complete envelope intake.
May	Envelope: Opaque Assemblies	<ul> <li>Code &amp; Coffee         <ul> <li>Shading</li></ul></li></ul>	Model opaque envelope using personal project.
June	Envelope: Fenestration	Vorkshop: Solar & Battery TRY AND GET SCHEDULED https://energycodeace.com/training/?courseld=67760     Code & Coffee on PV https://www.youtube.com/watch?v=FAybe0QTSul&list=PLVH9EjkDaO5ILIAj9tUJ9hljORTXJPukl&index=1     OLSS Solar (2019 available https://energycodeace.com/training/?courseld=32347, check on 2022	Model fenestration using personal project.

July	Renewables	<ul> <li>Code &amp; Coffee on HVAC         <ul> <li>https://www.youtube.com/watch?v=4KMh2yQXadQ&amp;list=PLVH9EjkDaO5kYnlDpK2rXB4K_6WaFBnL2&amp;index=3</li> </ul> </li> <li>OLSS Res HVAC         <ul> <li>OLSS HERS</li> </ul> </li> <li>Res Mech Systems Vorkshop</li></ul>	Model PV and Battery using personal project.
August	Mechanical: HVAC	<ul> <li>OLSS Res Water Heating</li> <li>C&amp;C: Townhomes         https://youtube.com/watch?v=kZeNicRINtg&amp;feature=shares     </li> </ul>	Model HVAC using personal project.
September	Mechanical: IAQ	<ul> <li>Res lighting class         <ul> <li>https://energycodeace.com/training/?courseld=68732</li> <li>9/21/23</li> </ul> </li> <li>Energy Pro (or CBECC)         <ul> <li>https://energycodeace.com/training/?courseld=78051</li> <li>9/19/23</li> </ul> </li> </ul>	Model DHW using personal project.
October	Lighting	<ul> <li>CF1R class         <ul> <li>https://energycodeace.com/training/?courseld=78954</li> <li>10/24/23</li> </ul> </li> <li>Modeling tips need link 10/25/23         <ul> <li>Intermediate software modeling class</li> <li>CBECC-Res</li> <li>https://energycodeace.com/training/?courseld=25721 ???</li> </ul> </li> <li>CEA prep NEED LINK 11/1/23</li> </ul>	Research lighting products.
November	Modeling		Present 3 compliance approaches for personal project.
December	Final		Sign up for CEA exam.

	February (1st meeting) - Introduction
Review:	
Provide:	CABEC Introduction To Mentoring / Confidentiality Agreement / Quick Reference Glossary
Mentees to do:	Review and sign mentoring documents Confidentiality Agreement
Mentees to take:	<ul> <li>Energy Efficiency Concepts online self study (OLSS)         <ul> <li>https://energycodeace.com/training/?courseld=15156</li> </ul> </li> <li>Live Res Standards for Energy Consultants         <ul> <li>https://energycodeace.com/training/?courseld=67561</li> <li>1/17-19/23</li> </ul> </li> <li>Prepare for next month: Modeling Software for Beginners         <ul> <li>Energy Pro <ul> <li>https://energycodeace.com/training/?courseld=69609</li> <li>2/14/23 or</li> <li>CBECC-Res <ul></ul></li></ul></li></ul></li></ul>
Mentor check in:	<ul> <li>Set up monthly check in date with your mentee(s). Suggest it be the same day of month and time each month using online platform of choice (screen sharing essential)</li> <li>Get mentoring paperwork done, ask and document about the mentee(s) goals, confirm they are taking the class(es)</li> </ul>





	May (4th meeting) Envelope: Opaque Assemblies
Review:	□ Envelope Insulation
Provide:	Applicable ECA resources
Mentees to do:	Personal Project: Taking into consideration the insulation products you researched, model at least 3 different wall types, roof types and floor types SEPERATELY from each other (9 different runs) with at least 2 runs including each building feature being prescriptive options. Record change in compliance margins in spreadsheet. Do this for at least 2 climate zones (you decide based on where you think you will be doing your work, or asked to be assigned CZ's by your mentor) (now you have 18 different runs ). Be ready to talk about the assemblies used and the cost/install implications that would have to be communicated to client
Mentees to take:	□ Code & Coffee  o Shading <a href="https://www.youtube.com/@energycodeace2115">https://www.youtube.com/@energycodeace2115</a> o 2 story <a href="https://youtube.com/watch?v=RvX1PieUifE&amp;feature=shares">https://youtube.com/watch?v=RvX1PieUifE&amp;feature=shares</a> o E+E+A <a href="https://youtube.com/watch?v=E1qg5M1iagc&amp;feature=shares">https://youtube.com/watch?v=E1qg5M1iagc&amp;feature=shares</a> □ Code Breaker: o BAYREN ADU o BAYREN QII (Gina to set up)
Mentor check in:	<ul> <li>Confirm they are taking the class(es)</li> <li>Show example of modeling spreadsheet correctly filled out with opaque surface runs required (see above)</li> <li>Review modeling of opaque assemblies and talk about swings in compliance margins they are getting. Have a discussion about the research they are doing on insulation products and how that fits into the prescriptive assembly requirements</li> <li>Review any software error messages they are getting and how you suggest they work through them</li> </ul>

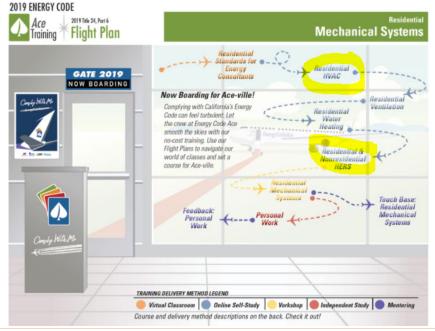
#### June (5th meeting) Envelope: Fenestration Revieww Envelope Opaque Provide: Applicable ECA resources: Fenestration Factsheet Mentees to do: Research at least 3 different window types and be comfortable with specifications, U-factor/SHGC, and install criteria (cost is a bonus) – Be ready to share with pod resources you used Personal Project: Model at least 3 different window types (U-factor, SHGC, NFRC versus default) and add each without an overhang, and each with 10' overhangs SEPERATELY from each other (6 different runs) with at least 1 run meeting prescriptive efficiency and area requirements. Record change in compliance margins in spreadsheet. Be ready to talk about the values used and the cost/install implications that would have to be communicated to client Mentees to take: Vorkshop: Solar & Battery TRY AND GET SCHEDULED https://energycodeace.com/training/?courseld=67760 Code & Coffee on PV https://www.youtube.com/watch?v=FAybe0QTSuI&list=PLVH9EikDaO5lLIAi9tUJ9hliORTXJPukl& OLSS Solar (2019 available https://energycodeace.com/training/?courseId=32347, check on 2022) 2019 ENERGY CODE 2019 Title 24, Port 6 Ace Flight Plan Envelope, Solar Systems & Lighting Training Standards to Energy Solar **GATE 2019** NOW BOARDING Residential Now Boarding for Ace-ville! Building Complying with California's Energy Code can feel turbulent Let the crew at Energy Code Acesmooth the skies with our Lighting no-cost training. Use our Flight Plans to navigate our world of classes and set a course for Ace-ville. Residential Envelope, Personal & Lighting Feedback TRAINING DELIVERY METHOD LEGEND Traditional Classroon Online Self-Study 🎒 Virtual Classroom Vorkshop | Independent Study | Mentoring Course and delivery method descriptions on the back. Check it out! Mentor check in: Confirm they are taking the class(es) Show example of modeling spreadsheet correctly filled out with fenestration runs Review modeling of fenestration features and talk about swings in compliance margins they are getting. Have a discussion about the research they are doing on insulation products and how that fits into the prescriptive fenestration requirements Review any software error messages they are getting and how you suggest they work through them

	July (6th meeting) Envelope: PV, Solar Ready, Battery & Battery Ready
Revi	□ Fenestration & Renewables
Provide:	Applicable ECA resources: N/A
Mentees to do:	<ul> <li>Research PV and Battery costs (3 PV system sizes: 2 kW, 5 kW, 12 kW; 2 Battery technologies: 10 kWh (lithium and 1 other)</li> <li>Be ready to share at mentor meeting the resources you used</li> </ul>

- Personal Project: Model the 3 different PV sizes for 2 different climate zones (6 different models)
  - o Take one of those models, and add 10 kWh battery (1 additional model)
  - o Record change in compliance margins in "Job Aide-Building Feature Summary".
  - Be ready to talk about the systema controls used and the cost/install implications that would have to be communicated to client.

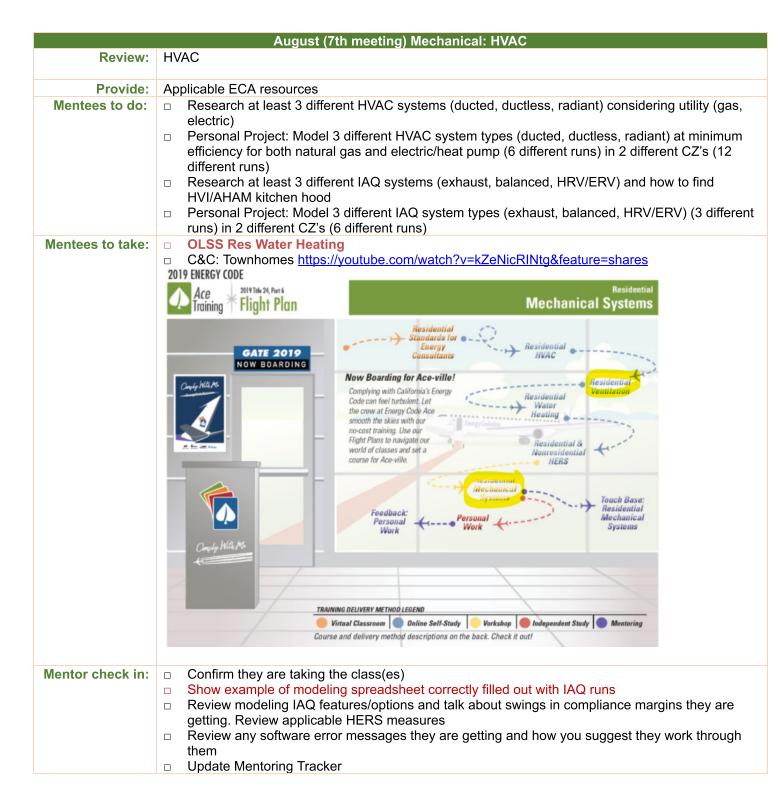
# Mentees to take:

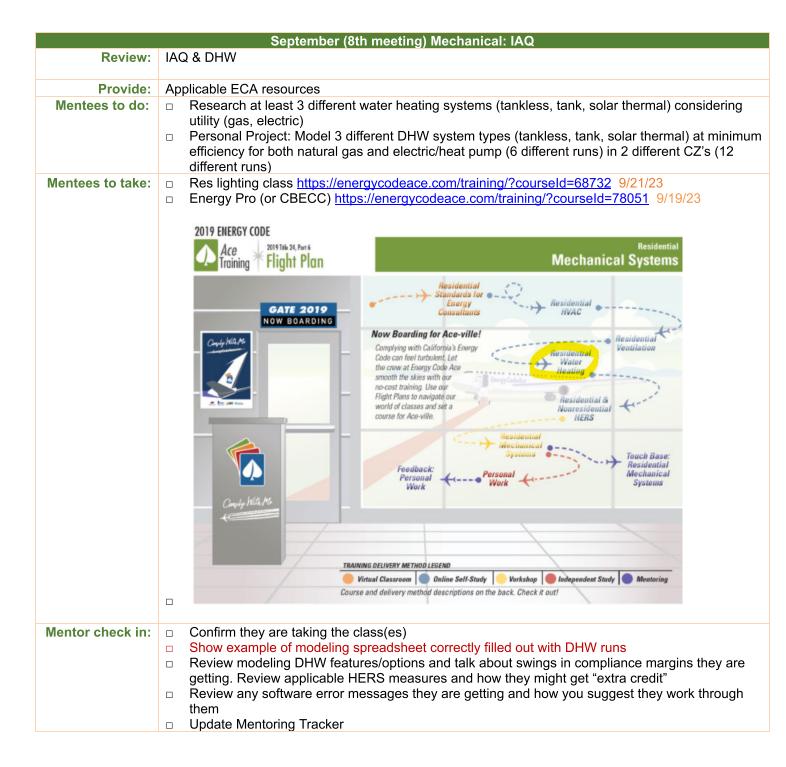
- Prep for next month:
  - o Code & Coffee on HVAC https://www.youtube.com/watch?v=4KMh2yQXadQ&list=PLVH9EjkDaO5kYnlDpK2rXB4K\_6W aFBnL2&index=3
  - o OLSS Res HVAC
  - o OLSS HERS
  - Res Mech Systems Vorkshop https://energycodeace.com/training/?courseId=71187 7/10/23
  - Residential Standards for HVAC Contractors Designer/Estimators https://energycodeace.com/training/?courseId=64330 7/11/23

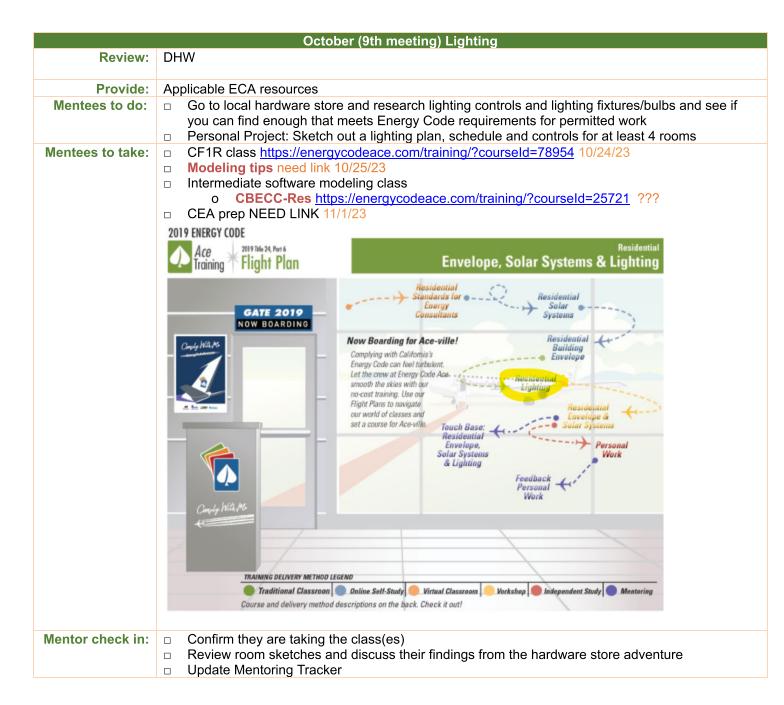


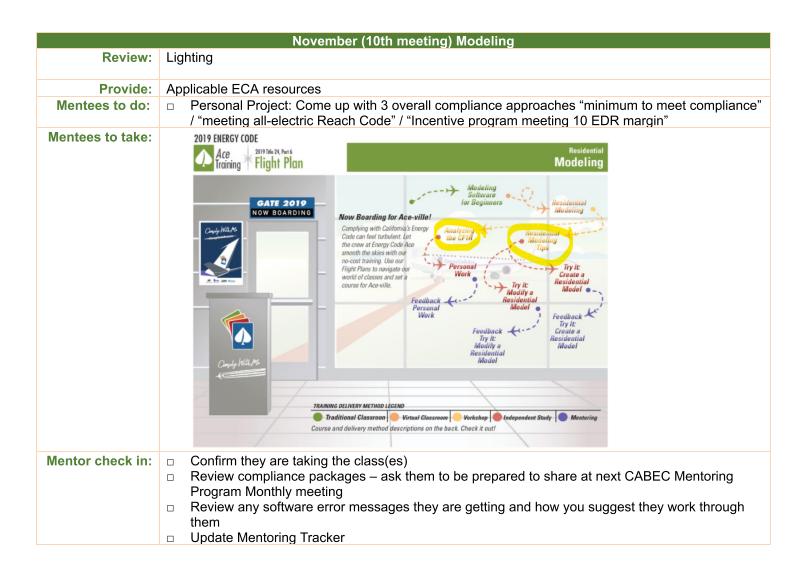
# Mentor check in:

- Confirm they are taking the class(es)
- Show example of modeling spreadsheet correctly filled out with HVAC runs
- Review modeling HVAC features/options and talk about swings in compliance margins they are getting and impact of distribution. Discuss how all-electric Reach Codes may dictate HVAC system type (<a href="www.localenergycodes.com">www.localenergycodes.com</a>). Review applicable HERS measures
- Review any software error messages they are getting and how you suggest they work through them









	December (11th meeting) Final
Review:	Have volunteers share their projects and their three compliance packages
Provide:	Applicable ECA resources
Mentees to do:	□ Look into CEA testing dates
Mentees to take:	□ Prep for res CEA exam
Mentor check in:	□ Have a party

# Appendix C: Roadmap: CEA Exam Competencies and Objectives mapped to Learning Modules

#### Competency 1: Comprehend Key Residential Energy Efficiency Design Concepts and Issues

Demonstrate knowledge of basic heat transfer, residential energy design measures, and how they relate to building energy performance or metrics.

dilating effergy perio											
	1 EEC	2 Intro Modeling	3 Envelope Insulation	4 Envelop Opaque	5 Envelope Fenestrati on	5 Renewables	6 HVAC	7 IAQ	8 DHW	9 Lighting	10 Interme diate Modelin g
1.1 Describe methods of heat transfer and ways to maintain comfort conditions within living spaces and energy units.	OLSS EE Concepts										
1.2 Determine appropriate general methods for reducing building and end- use energy consumption through energy design and energy efficiency.	OLSS EE Concepts     Res Stds EC		Vshop Res Env & Solar	Code     B     ADU     Vshop     Res     Env &     Solar	Vshop Res Env & Solar	OLSS Res Solar CodeB Solar Vshop Res Env & Solar	OLSS Res HVAC     Vshop Res Mechanic al Systems	OLS     S     Res     Ven     tilati     on	OLSS     Res     Wate     r     Heati     ng	Res Ligh ting	
1.3 Describe envelope/PV design elements and explain how they affect energy design and efficiency	OLSS EE Concepts     Res Stds EC		Vshop Res Env & Solar	Code     B     ADU     Vshop     Res     Env &     Solar	Vshop Res Env & Solar	OLSS Res Solar CodeB Solar Vshop Res Env & Solar				Res Ligh ting	
1.4 Describe mechanical and water heating design elements and explain how they affect energy design and efficiency.	OLSS EE Concepts,     Res Stds EC						OLSS Res HVAC     Vshop Res Mechanic al Systems	OLS     S     Res     Ven     tilati     on	OLSS     Res     Wate     r     Heati     ng		
1.5 Describe lighting design elements and explain how they affect energy design and efficiency.	OLSS EE     Concepts     Res Stds EC									• Res Ligh ting	
1.6 Explain what common building energy performance metrics measure, and what factors are included in the calculation of these metrics.	OLSS EE Concepts										

# Competency 2: Conduct Initial Project Assessment and Determine How to Apply the 2019 California Building Energy Efficiency Standards

Gather preliminary information from drawings, related documents, and the client to determine the nature and scope of the project; determine how to apply the Standards in establishing the correct code requirements and the available energy compliance options.

	1 EEC	2 Intro Modeling	3 Envelope Insulation	4 Envelop Opaque	5 Envelope Fenestratio n	5 Renewable s	6 HVAC	7 IAQ	8 DHW	9 Lighting	10 Intermedia te Modeling
2.1 Explain scope and triggers for specified portions of the Title 24 low-rise residential standards, federal and state appliance standards.	• Res Stds EC	Res Model ing	Vshop Res Env & Solar	• CodeB ADU	Vshop Res Env & Solar CodeB ADU	OLSS Res Solar Vshop Res Env & Solar CodeB ADU CodeB Solar	OLSS Res HVAC Vshop Res Mecha nical Syste ms	OLSS Res Ventil ation	• OLSS Res Water Heatin g	• Res Lighti ng	<ul> <li>Res Model ing Tips</li> <li>Res Lighti ng</li> </ul>
2.2 Analyze information about a proposed project (e.g., drawings, related schedules and documents, information from client) to determine scope and key attributes.	• Res Stds EC	Res Model ing		• CodeB ADU	Vshop Res Env & Solar CodeB ADU	CodeB     ADU     CodeB     Solar					<ul> <li>Res Model ing Tips</li> </ul>
2.3 Analyze proposed project information to determine which standards apply, possible compliance options and strengths and weaknesses of compliance methods.	• Res Stds EC	Res Model ing		• CodeB ADU	Vshop Res Env & Solar CodeB ADU	CodeB ADU C&C PV CodeB Solar					Res Model ing Tips
2.4 Review information about a proposed project to determine key data about the building's envelope/PV and mechanical components.	• Res Stds EC	Res Model ing	Vshop Res Env & Solar	• CodeB ADU	Vshop Res Env & Solar CodeB ADU	OLSS Res Solar CodeB Solar Vishop Res Env & Solar CodeB ADU	• OLSS Res HVAC				Final     Projec     t     activit     y
2.5 Analyze proposed project information to determine if all data is correct and internally consistent, and whether relevant information is missing or incomplete.		• Tools									• Final Projec t activit y

#### Competency 3: Gather, Calculate and Organize All Information Needed for Energy Modeling

Review drawings, specifications and information provided by the designer or client; gather, calculate and record all pertinent data to input into the energy modeling software.

	1 EEC	2 Intro Modeling	3 Envelope Insulation	4 Envelop Opaque	5 Envelope Fenestratio n	5 Renewable S	6 HVAC	7 IAQ	8 DHW	9 Lighting	10 Intermedia te Modeling
3.1 Analyze a proposed project to determine pertinent data regarding HVAC systems and zones, including any HERS measures, to input into energy modeling software.		Res Model ing					OLSS Res HVAC C&C Advan ced HVAC & DHW		C&C     Advan     ced     HVAC     &     DHW		• Res Exam Prep
3.2 Analyze a proposed project to identify pertinent data regarding water heating system(s) to input into energy modeling software.		Res Model ing					C&C Advan ced HVAC & DHW				• Res Exam Prep
3.3 Organize and perform zone- by-zone area take-offs in accordance with the scope, type, and compliance approach for the project.		Res Model ing	C&C     ADU     Detac     hed     C&C     ADU     Attach ed	C&C     ADU     Detac     hed     C&C     ADU     Attach     ed	C&C ADU Detac hed C&C ADU Attach ed	C&C PV C&C ADU Detac hed C&C ADU Attach ed					
3.4 Analyze take-offs for a proposed project to identify any relevant information that is missing or inconsistent.		• Tools	• C&C Take- off & Analys is	• C&C Take- off & Analys is	• C&C Take- off & Analys is		• C&C Take- off & Analys is	• C&C Take- off & Analys is	• C&C Take- off & Analys is		

#### Competency 4: Model the Building with Approved Energy Compliance Software

Create an energy model of the building from all information gathered. Check to see if on-screen and report results are reasonable, and if not, correct the source of the error(s).

	1 EEC	2 Intro Modeling	3 Envelope Insulation	4 Envelop Opaque	5 Envelope Fenestratio n	5 Renewable s	6 HVAC	7 IAQ	8 DHW	9 Lighting	10 Intermedia te Modeling
4.1 Create an accurate energy model of a proposed project using state-approved energy modeling software.	• Res Exam Prep	Beg Energ yPro/C BECC- Res     Res Model ing,				• C&C PV	OLSS Res Res HVAC Vshop Res Mecha nical Syste ms C&C Advan ced HVAC & DHW		OLSS Res Water Heatin g C&C Advan ced HVAC & DHW		• Inter media te Energ yPro/C BECC- Res
4.2 Explain how the Standard Design is established based on the modeled envelope, HVAC and water heating.	• Res Stds EC	Res     Model     ing								C&C     2-     Story     C&C     E+A+A	Analyz ing the CF1R
4.3 Evaluate the results of a building energy model to determine whether the results shown in reports and on-screen are reasonable.		• Res Model ing	• C&C 2- Story • C&C E+A+A	• C&C 2- Story • C&C E+A+A		• C&C 2- Story	• C&C 2- Story • C&C E+A+A	• C&C 2- Story • C&C E+A+A	• C&C 2- Story • C&C E+A+A		<ul> <li>Analyz ing the CF1R</li> </ul>
4.4 Compare the CF-1R and other relevant compliance forms relative to known or listed project information (e.g., drawings, schedules and other data from client) to determine any modeling or data entry errors.		Res Model ing			C&C Res Model ing					C&C     Advan     ced     HVAC     &     DHW	Analyz ing the CF1R
4.5 Summarize the mandatory envelope, mechanical, water heating, and lighting measures that apply to a proposed project.	• Res Stds EC	Tools C&C Take- off & Analys is C&C New Construction	Vshop Res Env & Solar		• C&C Shadi ng	OLSS Res Solar Vshop Res Env & Solar	C&C Advan ced HVAC & DHW		C&C     Advan     ced     HVAC     &     DHW	Res ligting	• Final Projec t activit y

#### Competency 5: Consider Recommendations for Improving Energy Performance and Comfort

Use the knowledge of the project design and climate zone to make recommendations for improving energy performances to meet or exceed code.

	1 EEC	2 Intro Modeling	3 Envelope Insulation	4 Envelop Opaque	5 Envelope Fenestratio n	5 Renewable s	6 HVAC	7 IAQ	8 DHW	9 Lighting	10 Intermedia te Modeling
5.1 Evaluate the energy model for a proposed project to determine defensible recommendations for improving envelope design to meet or exceed code.	• Res Stds EC	Res Model ing									Analyz ing the CF1R
5.2 Evaluate the energy model for a proposed project to determine defensible recommendations for improving HVAC and water heating systems to meet or exceed code.	• Res Stds EC	Res Model ing					C&C Advan ced HVAC & DHW		C&C     Advan     ced     HVAC     &     DHW		Analyz ing the CF1R
5.3 Identify HERS measures, when they apply, and the HERS registration and verification process; determine installation certificates and other documentation that must be completed after permit issuance.	• Res Stds EC	Res Model ing	Vshop Res Env & Solar	Vshop Res Env & Solar	Vshop Res Env & Solar	OLSS Res Solar Vshop Res Env & Solar	OLSS Res HVAC OLSS Res and NR HERS	OLSS     Res     and     NR     HERS		• Res Lighti ng	• Res Model ing Tips
5.4 Describe the general characteristics and requirements of local Tier 1 energy codes, various utility incentives, tax credits and other energy programs; and energy-related calculation methods other than the Title 24 performance approach.						• CodeB Solar					

#### **Key to Roadmap Abbreviations:**

Analyzing the CF1R: Title 24 Part 6 Essentials: Residential Analyzing the CF1R: ECA Vorkshop

Beg&Adv EnergyPro: Beginning EnergyPro – Residential, and Advanced EnergyPro – Residential

DLSS 1: Modeling Downloadable Self Study 1: Project Scope and Envelope Take-offs

DLSS 2: Modeling Downloadable Self Study 2: Create Computer Model and Show Compliance DLSS 3: Modeling Downloadable Self Study 3: Analyze CF1R for More Compliance Options

FE Concepts: Residential and Nonresidential Energy Efficiency Concepts: Online Self Study

EE Concepts: Residential and Nonresidential Energy Efficiency Concepts: Online Self Study
HVAC & DHW DLSS: HVAC & DHW Downloadable Self Study: Model and Analyze System Options

Intro to HERS: Introduction to HERS: Online Self Study

Res Env & Solar: Title 24, Part 6 Essentials — Residential Standards: Envelope & Solar Systems: ECA

Vorkshop

Res Exam Prep: Residential CEA Exam Preparation Workshop

Res Mech: Title 24, Part 6 Essentials – Residential Standards: Mechanical Systems: ECA Vorkshop

Res Modeling: Title 24 Part 6 Essentials: Residential Modeling
Res Modeling Tips: Title 24 Part 6 Essentials: Residential Modeling Tips

Res Stds & Tech DHW: Title Title 24, Part 6 Essentials on Demand — Residential Standards & Technology:

Water Heating: Online Self Study

Res Stds & Tech Env: Title 24, Part 6 Essentials on Demand — Residential Standards & Technology: Building

Envelope: Online Self Study

Res Stds & Tech HVAC: Title 24, Part 6 Essentials on Demand — Residential Standards & Technology: Heating,

Ventilation, and Air Conditioning: Online Self Study

Res Stds & Tech Lighting: Title 24 Part 6 Essentials: Standards and Technology for Residential Lighting: Online

Self Study

Res Stds & Tech Solar: Title 24, Part 6 Essentials on Demand — Residential Standards & Technology: Solar

Systems: Online Self Study

Res Stds EC: Title 24 Part 6 Essentials: Residential Standards for Energy Consultants

Res Stds Vent: Title 24. Part 6 Essentials on Demand — Residential Standards: Ventilation: Online Self

Study

Note: Go to EnergyCodeAce.com for more information on all classes listed here.