

CACEA 2020 Annual Report



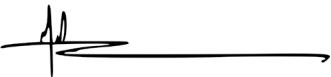
Letter from the President

It’s hard to believe that it was only one year ago that we met in person in Harrison Hot Springs, BC, for our last Annual General Meeting. What a year this has been. The COVID-19 pandemic has challenged our entire industry in a number of ways. Congratulations to all of our members on all of your hard work and adaptability through these difficult times.

Despite the pandemic, this has been an incredible year for CACEA, due in no small part to the tireless work of our dedicated members, volunteers, executive director, and board members. Our membership has grown by 250% since last year, and our members reach from coast to coast to coast. We have been actively involved in many initiatives involving industry stakeholders and policy makers, working to reinforce and support a sustainable, credible, and professional network of Energy Advisors.

More than ever, Energy Advisors are at the centre of the wheel in the housing industry. Whether in new or existing homes, EAs are being looked to by builders, trades, home owners, code officials, and policy makers, to provide expert guidance and consistent results in the field of residential energy efficiency. Along with new protocols developed in response to the COVID-19 pandemic, the development of new technologies and tools is quickly opening up new ways for EAs to increase our efficiency, accuracy, and client engagement. We are all looking ahead to many great opportunities in the near- and longer-term.

CACEA, along with our growing, active membership, is looking forward to continuing as a key player in the evolution and expansion of the role of the EA in residential energy efficiency. I encourage every member to play an active role—this is your association. Together we can affect great change.



Mark Rosen

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2020 Board of Directors



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CACEA promotes sustainable building practices and facilitates Canadian Home Labeling Programs including:

R-2000

ENERGUIDE



netzero
home



EnerGuide and R-2000 are official marks of Natural Resources Canada.
The ENERGY STAR® mark is administered and promoted in Canada by Natural Resources Canada.

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2020 & 2021 Premier Annual Corporate Sponsor



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Financial Report

2020 Year-End Financial Report

CACEA Balance Sheet

ASSETS	2020	2019
Cash	81,789	9,736
Accounts Receivable	39,962	-
PREPAID EXPENSES	-	-
	\$ 121,751	\$ 9,736
Capital Assets (Net)	-	-
LIABILITIES		
Accounts Payable	61,411	1,935
Deferred Revenue	12,000	-
	\$ 73,851	\$ 1,935

CACEA Income Statement

REVENUE	2020	2019
Member Dues	28,734	12,325
Projects	71,650	-
Other	18,105	2,100
	\$ 118,489	\$ 14,425
EXPENSES		
Office and Administration	34,965	2,583
Projects and Other	53,629	5,420
	\$ 88,594	\$ 8,003
NET SURPLUS	\$ 29,895	\$ 6,422

CACEA has had a strong 2020 due to increased membership, project participation, grants and sponsorship. While expenses were notably higher than 2019, this was due to a full cycle with the executive director, an increased focus on operational efficiencies and expenses related to projects.

2020–2021 Annual Budget Highlights and Summary

CACEA 2020-2021 Budget

REVENUE

Membership Dues	38,000
Sponsorship	18,000
Other	80,000
	\$ 136,000

EXPENSES

Member Programs	78,000
Office and Administration Expenses	54,000
Other	-
	\$ 132,000

NET SURPLUS	\$ 4,000
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In keeping an unpredictable economic environment, the board prepared a conservative 2020-2021 budget with total revenues of \$136K and total expenses of \$132K.

While the association anticipates a continued increase in membership, notable revenue projections are the focus.

The high member program expenses are related to the anticipated projects and an increased focus on educational offerings.

In 2020-2021, CACEA will focus on strengthening its financial position by diversifying revenue opportunities through sponsorship; project contracts and grants; event registration; and carefully managed expenses.

CACEA Job & Projects Postings

CACEA members (free) & non-members (\$50+) can view and post job openings and project/collaboration opportunities. To post something, complete the Job and Project Opportunity online form where you can provide a job description and link to your posting.

[Job and Project Opportunity Form](#)

Committee & Working Group Activity

Education

Members: Terry Adamson, Westeck Windows; Sanjeev Batta Step 5 Solutions; Meyland Gravel-Labelle, Buildingexpert Consulting-Services ; Gilles Lesage, Total Home Solutions; Kristi Owens, E3 Eco Group; Matthew Salkeld, consultant; Toby Smith, Building Knowledge

Mandate: Develop and promote educational programs, training and information exchange designed to meet CACEA member needs and expectations. The committee develop the educational calendar, identify speakers, seek educational partnerships and content, and ensure CACEA provides valuable content.

- The education committee did an incredible job providing monthly webinars. Titles included:
 - Overview of the Proposed 2020 NBC Tiered Energy Code for Houses (9.36)
 - Buildings as a Climate Change Solution_ Embodied and Operational Carbon and True Zero Carbon Buildings,
 - Mechanical Design
 - Heat Pump: A conversation with the experts
 - Ventilation and IAQ: What you want to know
 - Part 2: HVAC design for energy Evaluators
 - De-mystifying Deep Energy Retrofits
 - Horror Stories from the Field
 - How to Use the Planning and Decision Guide for Solar PV Systems
 - Lessons Learned from CACEA'S NRCan CBAT/HTAP Project
 - Modeling in National Energy Codes: Flexible, transparent, and objective-oriented
 - Getting More from Your Blower Door
- Members have exclusive access to the webinar recording and other Resources in the [Member Hub](#).
 - Access to the Heating, Refrigeration and Air Conditioning Institute of Canada (HRAI) member rates for a sold out, EA-focused Heat Loss/Heat Gain Certificate program.

Membership

Members: Luke Dolan, Capital Home Energy; Einar Halbig, E3 Eco Group; Tyler Hermanson, 4 Elements; Gilles Lesage, Total Home Solutions; Andy Oding, Building Knowledge Canada; Jeffrey Robinson, EnerTech Solutions; Mark Rosen, Building Energy Inc.

Mandate: Establishes and executes a strategy for membership recruitment and retention.

- Provide introductions to potential members and guidance in member services.

Mentoring Program

Members: Alison Conroy, Pelican Consulting; Lauren Lipka, NB Power, Kristi Owens, E3 Eco Group

Mandate: To oversee a mentoring program that facilitates professional development or CACEA members.

- Assisted with the development of the mentoring program requirements and support material.

Nominating

Members: Luke Dolan, Capital Home Energy; Mark Rosen, Building Energy Inc.; Toby Smith, Building Knowledge

Mandate: To ensure a transparent nomination process for the board of director.

- Reviewed the materials and oversaw the process to ensure a transparent and open nominating process.

Technical

Members: Angela Bustamante (Chair), Building Knowledge Canada; Terry Adamson, Westeck Windows; Amelie Caron, Ecosynergy; Emma Conway, E3 Eco Group; Gord Cooke, Building Knowledge Canada; Stephen Downs, Map Energy; John Harris, DSG Building Diagnostics; Sacha Klein, Sacha Klein Energy Service; Lauren Lipka, NB Power; Mark Rosen, Building Energy Inc.; Gerry Sawkins, 3 West Building Energy Consultants; Ray Smith, Kootenay Energy Advisor; Jack Zhou, A and J Energy Consultants

Mandate: Identify technical issues; seek clarity and possible solutions; engage with stakeholders on behalf of CACEA; contribute to producing reports, feedback/position requests, white papers, FAQs, etc., to support and help CACEA members and stakeholders.

- Established a form that members can use to identify issues for review by the committee "CACEA Issues Clarification Form"
- Appointed a CACEA representative to sit on NRCan's TAC
- Raised Air Tightness issue at the Standing Committee on Energy Efficiency (SCEE) during the development of the 2020 NBC
- Created a Frequently Asked Questions (FAQ) format and identify content that needs to be addressed
- Identify issues that need to be discussed with NRCan and shared with members.

Virtual Tools

Members: Ken Baigent Artic Energy Alliance; Angela Bustamante, Building Knowledge Canada; Amelie Caron, Ecosynergy; Emma Conway, E3 Eco Group; Gord Cooke, Building Knowledge Canada; Brent Crawford, Homesol Building Solutions; Luke Dolan, Capital Home Energy; Stephen Downs, Map Energy; John Harris, DSG Building Diagnostics; Gord Cooke, Building Knowledge Canada; Einar Halbig, E3 Eco Group; Shawna Henderson, Blue House Energy; Mark Rosen, Building Energy Inc.; Matthew Salkeld, consultant

Mandate: Provide input and recommendations related to virtual tools on an ad hoc basis and when required.

- Formed in 2020, the group met once to have a general discussion about the use and potential benefits of virtual tools to supplement the work of EAs and highlight the risks of only using these tools.

Additional Member Engagement Initiatives

EA Council - East/West/National

- CACEA held several EA Councils bringing together Full and Junior members to facilitate networking and provide a place for EAs to discuss topics specific to them in a National Forum as well as several East and West Forums.

Early Career Forum

- Members from across Canada who recently became EAs had an opportunity to meet one another and have an opportunity to discuss items of interest to those who are new to the profession.

New Member Orientation

- New CACEA members came together to network, ask questions and learn more about CACEA member services.

Women's Forum

- A Forum where members who identify as female can network, share non-technical ideas and provide support.

Thanks to our incredible volunteers!

Have you considered joining a committee?

- ✓ Have an IMPACT!
- ✓ Expand your NETWORK!
- ✓ MAXIMIZE your membership!

[Join a committee](#)

Members of CACEA have exclusive access to:



KNOWLEDGE

Information, resources, and professional development supporting competitiveness and professionalism.



NETWORK

Strong and supportive industry leaders and peers. Valued connections enhancing business.



INFLUENCE

Key industry and regulatory stakeholders — promoting the importance of the profession.

Membership Update



In 2020, there was a big focus on attracting and retaining members with a focus on strengthening member services and expanding our outreach and messaging. As a result membership increased significantly—with an **over 250% growth**. And, as of December 2020, CACEA has representation in the majority of the provinces as well as the North West Territories!

With our continued focus on membership and efficient operations, CACEA implemented a web-based membership platform. Now members can apply and renew online, register for events, be part of a more robust and searchable online directory and access an exclusive members only section. With this update, the Association was able to have an interactive **Members Forum** where members can ask questions, share experiences as well as upload documents and photos. Now when something is posted to the Forum, every member receives an email notification with a link to the discussion.

While there is still work to be done to populate the **Member Hub**, it is a place where members can access useful tools, reference guides and reports, key energy efficiency information, and much more.

CACEA's goal is to make this part of the website the go-to for EAs to find the information that will help them be successful in the work they do.

Having problems accessing the Member Hub? Request a new password or contact info@cacea.ca for assistance.

Daily summary of updates for Professional forum from Canadian Association of Consulting Energy Advisors (CACEA) Inbox x

Canadian Association of Consulting Energy Advisors (CACEA) <admin@me... Mon, Jan 25, 12:20 AM (3 days ago)
to me ▾

Forum [Professional forum](#) at [Canadian Association of Consulting Energy Advisors \(CACEA\)](#)
Updates for 24 Jan 2021

[Digital DCE](#), 1 post(s), Ray Smith, 24 Jan 2021 4:21 PM;

[Cold Climate Heat Pump Research](#), 1 post(s), Ray Smith, 24 Jan 2021 3:32 PM;

CACEA website screenshot of the new Members Forum

Member Discount Partners

Members can save on unique products & services.

To find out how to access these exclusive savings, visit the [Member Hub](#).

It pays to be a member!!

 Discounted training courses	 Discounted training courses	 Discounted services
 Exclusive insurance programs	 Discounted online workplace health and safety courses	 Save 10% at Mark's
 Save on entertainment, travel, health, attractions, shopping, sport and more	 Save 7.5% on products	 Save 7.5% on product

★ = New 2020 partners

- Member Hub
- CACEA Members Forum
 - [Forum Rules of Engagement](#)
- Member Discount Partners
- CACEA Webinar Recordings
- CACEA Member Information
- Tools, Reference Guides and Reports
- Building Codes
- Energy Information
- CACEA Member Profile

CACEA website screenshots of Discount Partners and Members Hub

Stakeholder Engagement & Activity

It's been a really busy year! Strengthening relationships with key stakeholders and sector organizations was a big focus for 2020. Stakeholder engagement across Canada was notable and CACEA is increasingly recognized as a valuable resource. Examples of CACEA's engagement include, but not limited to:

Nationally

- Participation with the Standing Committee on Energy Efficiency (SCEE) for the National Building Code 2020
- NRCan, Housing Division
 - Discussions about resources, funding opportunities, the EA path, certification, and requirements
- NRCan CamnetLEEP
 - Discussions about the LEEP Costing tools (CBAT and HTAP) and next steps, training and other initiatives
- ESNH Technical Advisory Committee (TAC)
 - Involved in the ongoing development of the Energy Star for New Homes program
- Built Green
 - Share information and explore support for one another
- Canadian Home Builders Association
 - Explore opportunities to engage EAs such as participating in the NZ Updated EA Training; Net Zero EA Training Working Group
- Canadian Renewable Energy Association (CanREA)
 - Seek ways to support our respective members
- Efficiency Canada
 - In addition to participating in the Discover-EE and Advocac-EE webinars and hosting a networking coffee break session, engaged in specific discussions related to air tightness, virtual audits, the role of EA, the NBC, etc. with a continued commitment to work together on common issues, share information and partner on advocacy efforts
- Empower Me
 - Gain an understanding of our respective missions and explore how to support one another
- Federation of Canadian Municipalities
 - Introduce the association and explore continued engagement
- the Heating, Refrigeration and Air Conditioning Institute of Canada (HRAI)HRAI
 - Explore how to support one another including offering education to members at preferred rates and/or sector focused content.
- North American Insulation Manufacturers Association (NAIMA)
 - Explore how to work together -in particular with retrofit training opportunities.
- Virtual technology providers, e.g., EnergyX, StepWin, Oracle, Light Spark
 - Understand the technology and goals and how it fits with the work of EAs.


Regionally

- BC Housing/BC Hydro/Fortis BC
 - Provide opinion and input, particularly related to IDP facilitation
- BC Energy Sep Code Council; its Capacity Building and Communications Subcommittee Energy Advisors Working Group
- BC Energy Step Code Competency Meeting
 - Providing support and input
- Clean Air partnership, Energy Retrofit Training Network (Ontario focus)
 - Learn about retrofit training initiatives, gaps and where CACEA can leverage existing programs, support stakeholder work and or take a leadership training role
- EnerQuality
 - Explore opportunities to support energy advisors, share resources and elevate the profession.
- Enbridge
 - Explore future engagement
- Fenestration Association of British Columbia
 - Develop a synergetic relationship, education, and information sharing.
- High Performance Stakeholder Council (HPSC)
 - Formal participation on the Council to ensure a voice for EAs and CACEA
- Transition angelique Québec
 - Introduce CACEA and explore potential value to Quebec advisors
- Humber College
 - Learn more about their initiatives and seek potential support and engagement from CACEA
- Pembina Institute
 - Introduce CACEA, share information and strengthen relations

Projects

- NRCan Costing high performance housing energy conservation measures (ECMs) Project
 - Worked with builders across Canada exploring builder choice to reach NZ/r, collecting costing data and referencing the Cost Benefit Analysis Tool (CBAT). We also used the Housing Technology Assessment Platform (HTAP) to build real time CBAT archetypes and provided feedback and recommendations in a report and webinar to NRCan representatives.
- NRCan Canadian Forces Housing Authority Housing Stock Audits
 - Helped on a larger NRCan project to complete EnerGuide housing audits for a sample of CHFA homes across Canada.

Strategic Plan Summary 2021-2023

 A TRUSTED, CRITICAL PARTNER	 RENOWNED FOR HIGHER, SPECIALIZED KNOWLEDGE AND EXPERTISE	 STRONG AND SUSTAINABLE
THE go-to resource for stakeholders— at the table for key discussions and decisions.	CACEA members get more work.	Strong governance, operations and stability.
<ul style="list-style-type: none">▪ Action plan to strengthen stakeholder relation and engagements▪ Action plan for enhanced regional support and services▪ Seek ways to assist stakeholders	<ul style="list-style-type: none">▪ A continuing education system.▪ Action plan to roll out training aligned with NRCan initiatives and competencies▪ Action plan addressing relevant topics supporting a modernized EA pathway▪ Launch a Mentoring Program	<ul style="list-style-type: none">▪ Action plan to increase national membership and sector representation.▪ Action plan to deliver non-dues revenue streams.▪ Ensure strong governance and operational practices.

OUR MISSION

To support a sustainable profession of successful and credible
Canadian Energy Advisors.

OUR VALUES

Competence › Forward Thinking › Integrity ›
Professionalism › Respect

OUR CORE PURPOSE

Promote the interest of the Canadian EAs for the betterment of
our members where they are seen as best in class and support
Canadian energy efficiency initiatives to better serve homeowners
and stakeholders.

Focus for 2021

- A continued focus on education through a mentorship program, monthly webinars, white papers; training course including a BC pilot for Integrated Design Process (IDP) Facilitation (supported by BC Hydro, FortisBC and BC Housing); technical FAQ documents; existing home training; useful checklists and information pieces.
- Monitor and speak on issues impacting EAs regionally and nationally.
- Expand on the Members Only section of the website.
- Continued work with NRCan on targeted projects and initiatives
- Increase awareness and strengthen relations with stakeholders regarding the value and importance of EAs and CACEA through articles, outreach, committee participation, letters of response and conversations.
- Facilitate networking and information sharing opportunities for members
- And more...

Visit the website and read the **CACEA e-News** for Association and industry information.

[CACEA Online](#)