

2022

ANNUAL REPORT



CACEA

A Word from the President

Another exciting year at CACEA and for our Energy Advisor Industry. This year we saw a large uptake in the profile of CACEA and demand for our input and support on a wide variety of developments and initiatives. You can see the huge extent of our engagement in this Report. CACEA is at the table, representing the interests of EA's across the country both on National issues that affect our members, but more and more, supporting regional developments.

CACEA's unique position to represent directly over 300 members, bringing their concerns to the table without the intermediate of Service Organization or corporate directors, gives a weight to discussions not had in Canada before. This voice gains strength with each member EA who joins, who volunteers, and serves on the board. Our viewpoints, experience and direct knowledge of the 'boots on the ground' work of EAs, including modeling and testing homes, is being recognized as key by stockholders across the industry, across Canada including Safety Code Councils, NRC, and NRCan.

The opportunities for our members and value returned is growing quickly. From connecting with colleagues, learning and mentorship, things keep growing. This year our Master Energy Advisor (MEA) designation is a major step forward for members to be recognized for their professionalism and accountability in many aspects of energy efficiency in the residential construction industry.

Thank you for supporting our mission through your hard work, volunteerism and membership. Together we are making an important place for EAs, creating a recognized, professional network able to support Canada's drive towards energy efficiency.

Cheers,



Tyler Hermanson, CACEA President
CBCP, CEM, NRCan QAS, LEED QAD

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Executive Director Report

Once again, it was an incredible year for the CACEA and its members – complete with expanded member services and stakeholder engagement.

CACEA focus is on ensuring that our members receive knowledge; a supportive network; and have a voice. This was exemplified in 2022 and the Association achieved several notable milestones;

- Significant information sharing through an expanded webinar calendar, not to mention training opportunities such as our annual Heat Loss Heat Gain Calculation certification for an EA audience through HRAI.
- Virtual and in-person networking opportunities through our REA Mentoring Program, EA Forums, Councils, committee work, and Online Member Forum – not to mention three in person Meet and Greet opportunities in BC, Alberta and Ontario.
- Increased interest to engage CACEA and its members in project work, industry workshops and stakeholder engagement. We look forward to working in particular with NRCan on a cross-country research project that is engaging 50 CACEA members to conduct field research to assess the impact of evaluating the airflow capacity of duct systems and determining design heat loss and heat gain on the sizing and selection of retrofit heat pumps. Not only are we facilitating the collection of much needed data, we are exploring potential services that EAs could offer to homeowners, builders and contractors.
- Significant industry and government engagement through consultations and industry workshops, industry council and committee participation as well as key and high level, one-on-one conversations. I encourage you to review Stakeholder section of this Report to get a sense of the scope of our engagement. CACEA is at the table and we are being heard.

I am pleased to highlight the launch of our Continuing Education Credit (CEC) program. CACEA holds EA members to a high standard - requiring Errors and Omissions insurance; verification that the REA is in good standing with their Service Organization and NRCan; and compliance to our Code of Ethics. The additional CEC requirement further demonstrates our members' commitment to ongoing learning and ensuring that they provide their clients with knowledge-based, credible services. Membership with CACEA allows our REAs to differentiate their services from a non-member – and this message is increasingly being heard beyond the Association. This is the first step as we look to launch another professional designation – the Master Energy Advisor (MEA). More to come in the upcoming year.

We have come a long way over the past several years – growing into a dynamic and vital organization. This success is thanks to CACEA's Board of Directors. They have provided the vision and leadership needed to grow the Association and ensure that there is a sustainable profession for energy advisors in the future. I also want to thank the incredible support and contributions of the many committee volunteers who have worked with me – seeking opportunities to continue to add value and support to our members. CACEA wouldn't be where it is today without them.

We know there are many changes ahead – some of which will directly impact EA advisors. Fortunately, there is an Association to represent and support them. CACEA will be there to navigate a path forward – advocating for the profession while engaging and supporting our members and industry partners. I encourage you to continue to leverage all that CACEA offers and to reach out to me directly whether to share ideas, voice concerns, or say hello.

Here's to another exceptional year where, together, we can continue to achieve great things together.



Cindy Gareau

2022 Board of Directors



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* Founding Member

Supporters

2020 - 2022 Premier Annual Corporate Sponsor
and CACEA French Website Sponsor



CACEA is grateful for the following suppliers for their support in 2022



Thank you to our Member Benefits Affinity Partners



Financial Report

CACEA Statement of Financial Position

	<u>2022</u>	<u>2021</u>
ASSETS		
Cash	113,623	139,505
Accounts Receivable	54,888	19,601
Prepaid Expenses	2,922	374
	<u>171,433</u>	<u>159,480</u>
LIABILITIES		
Accounts Payable and Accrued Liabilities	52,322	52,063
HST Payable	5,861	1,981
Payroll Liabilities	2,127	2,121
Deferred Revenue	37,649	31,050
	<u>97,959</u>	<u>87,215</u>
NET ASSETS	<u><u>73,433</u></u>	<u><u>72,265</u></u>

CACEA Statement of Operations

	<u>2022</u>	<u>2021</u>
REVENUE		
Projects	61,250	94,824
Member Dues	69,810	47,901
Other	19,379	17,160
	<u>150,439</u>	<u>160,785</u>
EXPENSES		
Administration and Operations	14,520	20,068
Management Fees	80,690	49,303
Projects and Other	47,500	46,196
	<u>149,230</u>	<u>115,567</u>
EXCESS OF REVENUES OVER EXPENSES	<u><u>1,209</u></u>	<u><u>45,218</u></u>

CACEA had positive year with assets continuing to increase slightly primarily due to an increase in membership revenue, our sponsorship from Owens Corning and the completion of projects. While administration and operations were lower than the previous year, it was not surprise that the management fees would be high due to having a full-time executive director. The Association anticipated there would be a deficit for 2022 based on the budget. Instead, it performed better than anticipated in fact netting just over \$1K at year end.

CACEA is still focused on its goal to ensure a fiscally sustainable association that can continue to support its mandate and Canadian energy advisors.

CACEA LAUNCHES THE MASTER ENERGY ADVISOR (MEA) DESIGNATION

The MEA designation is granted to highly-experienced REAs who are members of CACEA. MEAs can promote their expertise and provides a career pathway for others. It also designation demonstrates to stakeholders the reliability, competencies and expertise of REA.

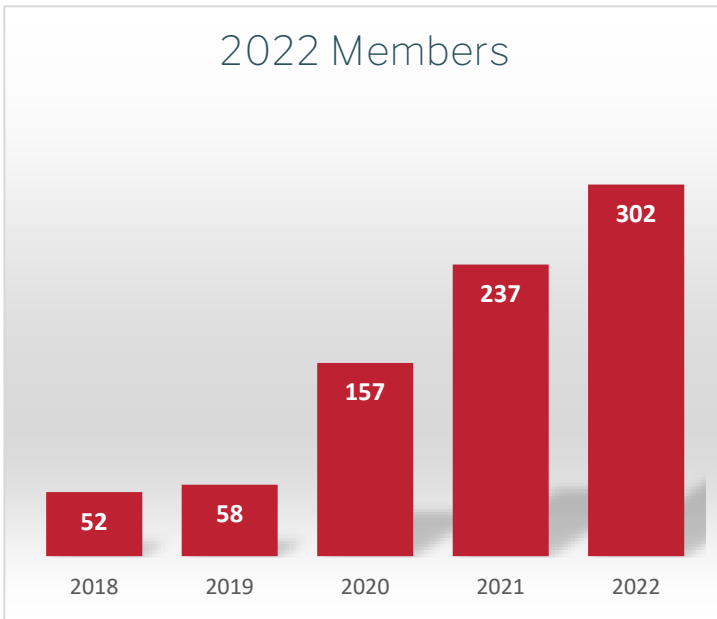
Visit the website to learn more about what is required and to apply.

Committees

CACEA is grateful for our volunteer committee work. Members share expertise; expand their network; contribute to the profession; maximize their membership; and propel the Association and industry forward.

<p>Communication</p>	<p>Education</p>	<p>Membership</p>
<p>Mandate: Develop and review the strategy and vehicles for member and stakeholder communication.</p>	<p>Mandate: Develop and promote education programs, training and information exchange that meets member needs.</p>	<p>Mandate: Establish and execute strategies for member recruitment and retention as well as engagement and ongoing value.</p>
<p>Members: Colin Garret, Montroc Consulting; Sean Martin</p>	<p>Members: Terry Adamson, Fenestration Canada; Sanjeev Batta, Step 5 Solutions; Wayne Gamborski, 3 West Building Energy Consultants; Meyland Gravel-Labelle, Buildingexpert Consulting-Services; Adrian Kanjer, Kirk Johnson, Eco-Efficiency Consulting; Kristi Owens, City Green; Gurmuk Singh, CanTech Energy Advisors; Toby Smith, Building Knowledge Canada; Michael White, HomeWorks Energy and Comfort Solutions</p>	<p>Members: Liam Butters, Ecology Consulting; Steve Croke, Map Energy; Daniel Giam, GETS Energy; Satvir Gill, Airtight Energy Reports; Tessa Hall, Equilibrium Energy Solutions; Ndoumbe Soumare, Homesol Building Solutions</p>
<p>Mentoring Program</p>	<p>Nominating</p>	<p>Technical</p>
<p>Mandate: Oversee an annual REA mentoring program that facilitates professional development for CACEA members.</p>	<p>Mandate: Ensure an open and transparent nomination process for the board of directors.</p>	<p>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 assist CACEA members and stakeholders.</p>
<p>Members: Kristi Owens, City Green; Jack Zhou, A & J Energy Consulting</p>	<p>Members: Emma Conway, E3 Eco Group; Andy Oding, Building Knowledge Canada; Tyler Hermanson, 4 Elements Design</p>	<p>Members: Terry Adamson, Fenestration Canada; Niels Antherson; Enerlytics Building Performance; Angela Bustmante, Building Knowledge Canada; Mark Carter, Bernhardt Contracting; Kyle Cartwright, Westeck Window Mfg; Luis Carvalheiro, EnerQuality Corp.; Brett Cass, CHBA; Amelie Caron, Ecosynergy; Emma Conway, 3E Eco Group; Steve Croke, Map Energy; Stephen Downs, Map Energy; Gary Hamer, BC Hydro; Sacha Klein, A & J Energy Consultant; Lauren Likpa, CHBA-NB; David Perehudoff, Step Five Design Build; Gio Robnson, PrairieHOUSE; Mark Rosen, Building Energy Inc.; Gerry Sawkins, 3 West Building Energy Consultants; Ray Smith, Kootenay Energy Advisors; Chelsah Thomas, Sol Invictus Energy Services; Abraham Wairisal, City of Toronto; Bowen Xue, Vantage Energy Solutions; Jack Zhou, A & J Energy Consulting</p>

Membership



By Province and Territory	
Atlantic	35
Quebec	9
Ontario	94
Manitoba	9
Saskatchewan	8
Alberta	32
British Columbia	115
North West Territories	2
USA	2

CACEA has continued to experienced notable growth over the past 5 years across the country across all member categories – demonstrating the value that the Association brings to members and the EA profession.

Member Engagement

- ★ 24 webinars, EA Councils and member Forums (Early Career, New Member, Women’s Forum) and “Meet and Greets”
- ★ Annual HRAI Heat Loss Heat Gain Calculation Certification – special rate with additional subsidies for BC, NB and NS.
- ★ 3 new discount partners – \$5 discount on CHBA Renovation and New Construction Guides; select cameras from FLIR; and 25% off HRAI training.
- ★ Member Recruitment Program with donated prizes from Supplier members.
- ★ Continuing Education Credit (CEC) program to further demonstrate that CACEA members are held to a high standard and commitment to providing credible services.
- ★ 23 jobs posted on CACEA’ job board.



British Columbia CACEA Meet and Greet



Ontario CACEA Meet and Greet

Stakeholder Engagement & Activity

CACEA was “at the table” in 2022 with continued engagement by stakeholders at all levels of government and across the Part 9 residential building community. The Association and its members are recognized and sought after as a valued and needed resource and contributor. Below are some examples of CACEA’s stakeholder engagement in 2022:

Nationally

- NRCan Greener Homes
 - Regular, ongoing discussions with the Greener Homes program team and leadership.
 - Participate in SO Townhall meetings.
 - **Formal Consultation:** Participated in stakeholder discussion on EA Qualifications.
 - **Ministry Engagement:** Sent letters responding to the Prime Minister’s mandate letters.
 - Met with Senior Policy staff for the Natural Resources Canada and Housing and inclusion and Diversity ministries.
- Standing Committee on Energy Efficiency (SCEE) for the National Building Code 2020
- NRCan – ENERGY STAR
 - Meet with NRCan to highlight concerns about the program, highlighting the importance of consulting with industry before launching program changes,
 - **Consultation:** Participated in a stakeholder consultation to discuss ESNH program.
 - Technical Advisory Committee (TAC) member.
- NRCan CamnetLEEP
 - Ongoing conversations.
 - **Contract:** To develop information about the Integrated Design Process (IDP) to support LEEP sessions.
 - **Contract:** Virtual Audit Benchmarking Research Project.
 - **Proposal Submission:** To conduct field research assessing the impact of evaluating duct systems’ airflow capacity and determine design heat loss and heat gain on the sizing and selection of retrofit heat pumps.
 - Ongoing conversations.
- NRCan Funded EA Training Agencies
Confederated College, Norquest College, EnviroCentre, Clean Foundation, Ecofitt, Gonezu Energy
- National Research Council
 - **Formal Consultation:** NRC Research Needs for Net Zero in Buildings
- Alliance of Canadian Building Officials’ Association
 - Explore collaboration to update 936 training
- Canadian Association of Radon Scientists and Technologists
- Canada Green Building Council
 - **Formal Consultation:** Participated in a Workforce 2030 workshop exploring opportunities and challenges for workforce development.
- Canadian Home Builders Association
 - Explore opportunities to collaborate, and support respective initiatives and projects.
 - **Technical Engagement:** Member of the Technical Research Council (TRC) and ex-officio member of the Net Zero Council.
 - Contributor and supporter through CamnetLEEP to assist with the CHBA Net Zero Renovation project and LEEP initiatives.
- Canadian Standards Association
 - Explore how to work together on an Integrated Design Process Guideline
- Canadian Renewable Energy Association
 - **Networking:** Attended the Electricity Transformation Canada trade show.
- Efficiency Canada
 - Participated in webinars.
 - Commitment to collaborate on issues, share information, and advocacy.
 - **Networking Event:** Attended a stakeholder engagement event.
- Electricity Canada
- Federation of Canadian Municipalities
- Fenestration and Glazing Industry Alliance
 - **Presentation:** A webinar: *EAs Are Your Partner: Understanding their role and contributions for effective engagement and compliance.*
 - Invited to participate in CACEA’s Fenestration Round Table discussion.
- Fenestration Round Table Discussion
 - Facilitated a roundtable of stakeholders of government, f-manufacturers and EAs to discuss fenestration challenges.
 - **Note:** Proposed updates to HOT2000 directly attributed to this meeting.

- Heating, Refrigeration and Air Conditioning Institute of Canada
 - Explore how to support one another including offering the annual fall Heat Loss / Heat Gain Calculation certification training targeted to EAs at preferred rates and/or sector focused content.
- North American Insulation Manufacturers Association

- Prince's Trust
 - Ongoing support and engagement with the Veterans Energy Advisor Program (VEAP)
- Virtual /Remote Technology Providers
 - Understand the technology and goals and how it fits with the work of EAs.

Regionally

BRITISH COLUMBIA

- Minister of Attorney General and Responsible for Housing
 - Submitted a response to the proposed BC Building Code (See News and Media)
- BC Ministry of Energy, Mines and Low Carbon Innovation
 - Labelling at point of sale)
- BC Hydro
- BC Building Officials Association
- BC Real Estate Association
- **Potential Project:** Capital Regional District
- **City of Vancouver**
- Community Energy Association (CEA)
 - CACEA updated and shared with CEA the previous year's version of the [*Simple Guide for Working with an Energy Advisor*](#) that EAs can share with their clients to help ensure a smoother process.
- Fortis BC
 - Regular touch points
 - **Consultation:** Updating HOT2000 Discussions
- High Performance Stakeholder Council (HPSC) and Energy Advisor Stakeholder Council
 - Council member
- Regional District of Okanagan-Similkameen

ALBERTA

- **Alberta Energy Efficiency Alliance (AEEA)**
- Alberta Urban Municipalities Association
- BILD Alberta
- City of Calgary Consultation and one-on-one meetings
- Ministry of Municipal Affairs
 - Building Code Letter (See News and Media)

- Smart Sustainable Resilient Infrastructure Association (SSRIA)

SASKATCHEWAN

- **Sustainability Support Group (Regina)**
- **SaskPower**

MANITOBA

- Manitoba Energy




ONTARIO

- City of Toronto
- City of Windsor
- Clean Air Partnership (CAP)
 - **Energy Retrofit Training Network:** Share retrofit training initiatives, gaps and increase awareness of CACEA
 - **Presentation:** A webinar about EAs to municipalities across Canada.
- CRESNET
 - Joint letter to AHJs about CACEA and EA services.
- **The Home Construction Regulatory Authority**
- Ontario Real Estate Association
- Ontario Building Officials Association
- Building Knowledge Canada Spring Camp Attendance
- Volta Research

ATLANTIC CANADA

- New Brunswick Power
- Efficiency One Nova Scotia

Strategic Plan Summary 2021-2023

 <p>A TRUSTED, CRITICAL PARTNER</p>	 <p>RENOWNED FOR HIGHER, SPECIALIZED KNOWLEDGE AND EXPERTISE</p>	 <p>STRONG AND SUSTAINABLE</p>
<p>THE go-to resource for stakeholders — at the table for key discussions and decisions.</p>	<p>CACEA members get more work.</p>	<p>Strong governance operations and stability.</p>
<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.

CACEA Members 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

Unified voice with key industry and regulatory stakeholders – promoting the importance of the profession.

For more information about CACEA contact us

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Consulting Energy Advisors