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Expanding the Certified Energy Analyst Program to Support Requirement for Performance Compliance Documentation Authors

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Executive Summary

As California's Energy Code continues to evolve and become more stringent, preparing performance compliance documentation requires an increasingly high level of technical knowledge and proficiency in energy modeling. Currently, anyone can prepare an energy model and serve as the documentation author for performance-based compliance documentation, regardless of their level of experience or proficiency with the compliance software. This can result in inconsistent, inaccurate, or, in some cases, intentionally misleading compliance documentation. These challenges present an opportunity to further strengthen the role of the Certified Energy Analyst (CEA) program as California's recognized standard for professionals preparing performance-based compliance documentation.

The CEA program is a mature certification program (beginning with the 2013 Energy Code) that is already well-established and well-known within California's energy consulting community. The California Association of Building Energy Consultants (CABEC) administers the Certified Energy Analyst program, maintains the certification infrastructure, delivers continuing education, and works collaboratively with the California Energy Commission and industry stakeholders to improve Energy Code compliance throughout California.

The enhancements described in this white paper are intended to strengthen, not replace, that foundation. The proposed program expands the existing certification framework by introducing practical quality assurance measures, modernizing certification administration, automating continuing education tracking, enhancing certification verification capabilities, and establishing stronger integration with California's compliance software ecosystem. Together, these improvements create a comprehensive quality assurance program that verifies both technical knowledge and practical proficiency throughout a professional's certification lifecycle.

With timely direction from the California Energy Commission and continued collaboration among CABEC, the Investor-Owned Utilities, and key stakeholders, CABEC is confident that the proposed enhancements can be designed, developed, tested, and implemented in advance of the January 1, 2029, effective date of the 2028 Energy Code. The approximately two-and-a-half-year implementation window provides sufficient time to develop the quality assurance framework, modernize certification systems, pilot new processes, integrate certification verification with compliance software, and conduct stakeholder outreach to ensure a successful statewide deployment.

This white paper outlines CABEC's vision for expanding the existing CEA program to support a potential California Energy Commission requirement that individuals preparing performance compliance documentation using the Performance Approach hold an active CEA certification beginning with the 2028 Energy Code, effective January 1, 2029.

Ultimately, this initiative represents the realization of the investments made in the long-term integrity of California's performance compliance process. By establishing a consistent, objective standard for professional competency and strengthening the mechanisms used to maintain that competency over time, the enhanced CEA program will improve the quality and consistency of compliance documentation, increase confidence among building departments and the California Energy Commission, and support more effective implementation of California's increasingly sophisticated building energy standards.

Purpose

The purpose of this implementation plan is to outline the activities necessary to prepare the Certified Energy Analyst (CEA) Program for a potential California Energy Commission requirement that individuals preparing performance compliance documentation using the Performance Approach hold an active CEA certification beginning with the 2028 Energy Code, effective January 1, 2029.

This document is intended to facilitate discussion among CABEC leadership, the California Investor-Owned Utilities (IOUs), and California Energy Commission staff regarding the program enhancements that would be necessary to support such a requirement. Rather than serving as a detailed scope of work, this implementation plan presents a high-level vision for how the existing certification program can evolve into a comprehensive statewide qualification and quality assurance program.

Background

Performance compliance has become an increasingly important component of California's Energy Code compliance process. As the code has evolved, energy modeling has grown more sophisticated, requiring a deeper understanding of building science, compliance software, mechanical systems, lighting systems, and the interaction between mandatory, prescriptive, and performance requirements. The quality of performance compliance documentation has a direct impact on code enforcement, plan review efficiency, and ultimately the energy savings realized through California's Building Energy Efficiency Standards.

The Certified Energy Analyst program was established by CABEC to provide an objective measure of competency for professionals preparing Title 24 performance compliance documentation. Through a comprehensive examination process and continuing education requirements, the program verifies that certified professionals possess the knowledge and skills necessary to prepare accurate compliance documentation.

The Certified Energy Analyst program already includes an established framework for maintaining professional competency. To remain certified, CEAs are required to complete nine hours of approved continuing education annually and successfully pass a multiple-choice recertification examination at the beginning of each new code cycle. These requirements help ensure that certified professionals remain current with changes to California's Energy Code, compliance software, and industry best practices. The enhancements proposed in this white paper are intended to build upon this existing recertification framework by adding a practical quality assurance component that evaluates continued proficiency in energy compliance modeling and the application of the Energy Code.

If the California Energy Commission elects to require documentation authors using the Performance Approach to hold an active CEA certification, the existing program will need to expand beyond initial certification and recertification every new code cycle. It will need to function as a comprehensive quality assurance program that not only evaluates competency at the time of certification but also demonstrates that certified professionals maintain their knowledge and technical proficiency throughout each code cycle update.

The purpose of this effort is not simply to administer additional examinations. Rather, it is to establish the administrative, technical, and quality assurance infrastructure necessary to support a statewide professional qualification program that the Energy Commission, local jurisdictions, and the building industry can rely upon.

Vision for the Program

The expanded CEA program would become the statewide framework for qualifying individuals who prepare performance compliance documentation. It would provide confidence that documentation authors possess both the technical knowledge and practical modeling skills required to prepare accurate compliance documentation while maintaining those competencies through continuing education, periodic recertification, and ongoing quality assurance.

The program would build upon the existing certification process by introducing practical modeling assessments as part of the recertification cycle, strengthening administrative oversight of certification maintenance, modernizing certification tracking, and creating automated methods for verifying certification status through California's compliance software ecosystem.

Rather than viewing certification as a one-time achievement, the program would recognize professional competency as an ongoing responsibility supported by continuing education, demonstrated proficiency, and active participation within the profession.

Program Elements

Successfully implementing a mandatory certification requirement will require the development of several interconnected program components.

The first is an expansion of the administrative infrastructure supporting the CEA program. The existing certification program was designed to certify qualified individuals, but a statewide regulatory requirement would substantially increase the need for certification management, customer support, continuing education tracking, recertification processing, quality assurance administration, and reporting. Additional staffing and clearly defined administrative procedures will be necessary to ensure certifications remain current, records are maintained accurately, and participants receive timely support throughout the certification lifecycle.

A second component involves establishing a formal Quality Assurance program. Discussions to date have consistently concluded that reviewing complete project submissions would be cumbersome, expensive, and difficult to administer consistently. Instead, the preferred approach is to develop standardized modeling exercises that evaluate an individual's ability to correctly prepare and modify performance compliance documentation using approved compliance software. These exercises would be based on predefined scenarios, allowing objective scoring while evaluating practical modeling skills that closely resemble real-world consulting activities. Examples may include correcting intentionally non-compliant models, modeling additions or alterations, resolving plan review comments, or recommending appropriate compliance strategies for a project that does not initially comply.

This practical assessment would complement, rather than replace, the existing multiple-choice recertification examination. Continuing education requirements ensure that certified professionals remain informed about changes to the Energy Code, while the written examination confirms continued knowledge of code requirements. The modeling assessment provides an additional measure by demonstrating that certified professionals can successfully apply that knowledge using compliance software. Together, these elements create a comprehensive quality assurance framework that evaluates both knowledge and professional competency.

Technology modernization represents another critical component of the implementation effort. A centralized certification database capable of maintaining real-time certification status will be necessary to support statewide implementation. In addition to maintaining certification records, the database should support continuing education tracking, quality assurance completion records, renewal notifications, reporting, and audit capabilities.

The expanded database also creates the opportunity for direct integration with California's compliance software and report generation systems. Under this concept, compliance software would automatically validate that the documentation author possesses an active CEA certification when compliance documentation is generated. This "handshake" between CABEC's certification database and the compliance software would provide building departments and the California Energy Commission with confidence that certification requirements are being met without introducing additional administrative burden during project submittal.

Because these systems have not previously been implemented at this scale, a comprehensive test should be conducted before any certification requirement becomes effective. Participants would complete the proposed quality assurance assessment, participate in testing of the certification database, and validate software integration with compliance tools. The test would also provide valuable feedback regarding examination length, administrative procedures,

scoring consistency, and participant experience, allowing refinements before statewide deployment.

Implementation Strategy

The proposed implementation is intended to occur in phases so that all program elements can be fully developed, tested, and refined before the 2028 Energy Code becomes effective.

The initial phase would focus on program planning, policy development, quality assurance design, administrative procedures, and modernization of the certification database. During this period, assessment materials would be developed, certification policies refined, and coordination initiated with software vendors and the California Energy Commission regarding system integration requirements.

The second phase would emphasize pilot implementation and operational testing. Quality assurance assessments would be administered to pilot participants, software integration would be validated, continuing education automation would be implemented, and stakeholder feedback would be incorporated into the final program design. This phase would also include outreach to the building industry, local jurisdictions, and existing documentation authors to ensure the transition occurs smoothly.

Following successful completion of the pilot, the program would be prepared for statewide implementation concurrent with the effective date of the 2028 California Energy Code on January 1, 2029.

Benefits

Expanding the Certified Energy Analyst program in this manner would provide significant benefits to California's building compliance community. Building departments would receive performance compliance documentation prepared by individuals who have demonstrated both technical knowledge and practical competency. Documentation authors would benefit from a clearly defined professional qualification that recognizes their expertise and commitment to maintaining current knowledge of the Energy Code. The California Energy Commission would gain a transparent and auditable process for verifying professional qualifications while supporting improved compliance with increasingly complex building energy standards.

Perhaps most importantly, the program would provide a sustainable framework for maintaining professional competency as future Energy Code cycles introduce new technologies, compliance methodologies, and software capabilities. By establishing ongoing quality assurance rather than relying solely on initial certification, the program supports the long-term integrity of California's performance compliance process.

Next Steps

This implementation plan is intended to begin a conversation rather than present a final program design. Several implementation details—including quality assurance frequency, remediation procedures, certification transition policies, software integration requirements, and long-term funding, will require continued collaboration among CABEC, the IOUs, the California Energy Commission, and other stakeholders.

Following review of this implementation plan, the next step would be to develop a detailed Statement of Work describing the activities, staffing, deliverables, schedule, and budget necessary to fully implement the program before the 2028 Energy Code takes effect.