

DOCKETED

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EXHIBIT J

CaICERTS HERS Provider Application for
2022 Code Cycle: Quality Assurance
Qualifications



Director of Quality Assurance

Qualifications

- 6+ years of experience with a Title 24 HERS Provider; Director of Quality Assurance.
- 12+ years of experience in HVAC Design & Commissioning, HERS, Test & Balance, Building Science, Technical Training, Code Application & Enforcement.
- 20+ years of experience with organizational management; scalable planning and implementation.
- Extensive knowledge of diagnostic testing procedures and associated regulations.
- Extensive experience training contractors, builders, code enforcement officials, architects, engineers, HERS Raters.
- Strong understanding of both CA energy code, and national energy efficiency programs.
- Performed thousands of HERS Ratings, QA field inspections, and HVAC design and installations.
- Licensed CA Contractor C-20 with experience in performance based installation & air balance.
- Member of RESNET Standards Development Committee 900: Oversight of Quality Assurance Standards.

Professional Experience

DIRECTOR OF QUALITY ASSURANCE | CALCERTS | 2016 - PRESENT

- Manage CalCERTS Quality Assurance programs and staff.
- Integral in development of departmental strategies and Quality Assurance protocols.
- Oversee implementation of QA strategies to achieve program goals per Title 20, Section 1673.
- Responsible for complaint processing, investigation and resolution.
- Responsible for all Quality Assurance reporting.

PRINCIPAL | CALIFORNIA HERS RATER & AIR BALANCE | 2010-2016

- Performed thousands of 2005, 2008 and 2013 standards HERS Verifications.
- Test, Adjust and Balanced HVAC systems in residential & commercial applications.
- Developed training material and educated C20 technicians and General Contractors on performance based installation.

PRINCIPAL | ALLELUIA AIR | 2010-2016

- Consulted with HVAC contractors on system capacity and duct design.
- Designed hundreds of HVAC air distribution systems.

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2005954
- CSLB HVAC License C20-1013816
- Energy Star/Special Energy Programs
- HERS H20
- NCI Residential System Performance Technician #16-132-04
- NCI Residential Air Balancer #16-143-05
- NCI Commercial Air Balancer #15-522-08
- NCI Commercial System Performance Technician#16-132-04
- NCI Economizer Specialist #16-167-03
- EPA 608 Certification

Education

BA: LIBERAL STUDIES | ARIZONA STATE UNIVERSITY

Cassandra Dentley



Director of Client Services / QA Reviewer

Qualifications

- Eight (8) years of experience with a Title 24 HERS Provider; Director of Client Services.
- CalCERTS certified Title 24 HERS Compliance Rater.
- Extensive knowledge of Title 24 regulations and Provider registry regulations.
- Strong understanding of energy related features in residential construction.
- Strong understand of above code energy programs at state and national levels.
- Lead in communications with HERS Rating firms regarding documentation procedure.
- Problem solver.

Professional Experience

DIRECTOR OF CLIENT SERVICES | CALCERTS | 2014 - PRESENT

- Responsible for management of CalCERTS Client Services programs and staff.
- Integral in development of departmental strategies and registry protocols.
- Oversee creation of technical reference materials.
- Lead instructor for process flow for high priority Raters and Rating firms.

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2006643
- EPA 608 Type II
- BPI Building Science Principles

Education

MARKETING | AMERICAN RIVER COLLEGE

Roy Mittleider



Director of Training / QA Reviewer & Instructor

Qualifications

- 10+ years of experience with a Title 24 HERS Provider; Director of Training, Quality Assurance Reviewer.
- 25+ years of experience as a Licensed CA Contractor B in residential and commercial construction.
- Extensive knowledge of California Building Energy Efficiency Standards Title 24, Part 6.
- Extensive experience training contractors, builders, code enforcement officials, engineers, HERS Raters.
- Extensive experience in collaboration with local and state officials in regulatory compliance.

Professional Experience

DIRECTOR OF TRAINING | CALCERTS | 2011 - PRESENT

- 10+ years of instructor experience training and mentoring in HERS Rating/Certifications, and energy efficiency programs.
- Building Performance Institute Proctor for BA, BE, IDL, QCI and HHE certifications.
- Lead curriculum developer with experience in writing and video production for both textbook and digital platforms utilizing e-learning and LMS.
- Performed an extensive number of QA field inspections through multiple code cycles.

OWNER/BUILDER | RLM CONSTRUCTION | 2004 - PRESENT

- Production supervisor and builder for new home construction and remodels.
- Research and development for greener building, solar inverters, and off grid homes.
- Designed, implemented and installed battery backup systems for solar homes.
- HVAC prep work and install.
- Solar system design and implementation.
- Installed tankless water heaters, design and installed passive cooling systems.
- Custom designed Lighting, LED, Fluorescent, low voltage and natural lighting.
- Radiant floor heating systems and tile.

OWNER | STERLING ROOFING | 2000 - 2003

- Bidding, management, production supervisor, and builder.
- Installed standing seam metal roofing and composition roofing for public works projects.
- Fabrication of metal systems such as trims, gutters, and flashings.

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2006093
- CSLB General Contractor License #5035714
- Adult Corrections Officer CORE Certification #5391-54325
- BPI Analyst Certification #5035714
- Bureau of Security and Investigative Services License #1694685
- Basic Life Saving Healthcare Provider
- Emergency Medical Technician 1 Basic

Education

AAS: CRIMINAL JUSTICE AND EMERGENCY MANAGEMENT | INSTITUTE OF TECHNOLOGY

Mauricio Morales



Quality Assurance Reviewer

Qualifications

- CalCERTS certified Title 24 HERS Compliance Rater.
- Strong understanding of diagnostic testing procedures and associated regulations.
- Compliance field support for California Energy Efficiency Standards Title 24 Part 6.
- 14+ years of experience in residential and small commercial construction & design.

Professional Experience

TITLE 24 SPECIALIST | CALCERTS | 2022 - PRESENT

- Lead Energy Modeler.
- Compliance support.
- Associate HERS Training instructor.
- Quality Assurance reviewer.

DRAFTSMAN | LAUGHLIN & SPENCE CIVIL ENGINEERS & SURVEYORS | 2007 - 2021

- Lead Energy Modeler.
- Designed indoor/outdoor lighting sheets.
- Designed electrical panel schedules for single and 3 phase, with conduit sizing calculations.
- Performed wire sizing and voltage drop calculations for commercial applications.
- Land surveying experience including locating property limits, plotting deeds, easements and legal descriptions, shooting topo, construction staking.
- Designed architectural, foundation, roof, electrical, water, gas, sewer & plumbing, and mechanical plans for residential and commercial construction.
- Experience with field sketching and layouts for construction and additions.

CONSTRUCTION | DION ROMERO CONTRUCTION | 2005 - 2007

- Framing of walls floors and hand framed roofs
- Concrete forming laying and finishing
- Minor plumbing work
- Painting
- Finish trim work

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2022006
- EPA 608

Education

AA: COMPUTER DRAFTING | ITT TECHNICAL INSTITUTE

Senior Technical Manager / Quality Assurance Reviewer

Work Experience

Sr. Technical Manager

October 2017 - Present

CalCERTS Inc., Folsom, CA

- Provide technical review and support for HERS Raters, contractors, energy consultants, installers, and in-house staff
- Content developer, subject matter expert, technical review and editing of energy code-related matters
- HERS Candidate Trainer – classroom and field house sessions
- BPI Proctor – online exams and field house testing
- Quality Assurance Support Team member for HERS Rater Quality Assurance monitoring

Sr. Technical Manager

August 2016 - November 2017

Benningfield Group, Folsom, CA

- Field trainer, content developer and subject matter expert for BayREN Codes and Standards Program addressing building department staff and other city and county departments within the nine Bay Area Counties
- Subject matter expert for the development of the 2016 Certified Energy Analyst (CEA) exam, technical writer and reviewer, and developed the CEA Repository User Guide
- Sr. Technical Manager for training and support to contractors in the Efficiency First/SMUD Home Performance Program (HPP)
- Lead energy consultant for Title 24 compliance consulting and documentation for architects, contractors, and homeowners
- TCAC and CUAC program technical document reviewer
- Field analyst for SMUD Data Analytics Study for energy analysis of specified SMUD homeowner residences

Adjunct Faculty, HVAC/Energy

August 2014 - Present

College of the Desert, Palm Desert, CA

- Developed and taught HVAC System Design and Energy Conservation courses focusing on energy efficiency fundamentals
- Instrumental in first comprehensive ZNE Technology curriculum and A.S. Degree program for CA Community Colleges
- Developed and currently teaching Title 24, Part 6 Energy Code online course at College of the Desert

HERS Rater and Energy Consultant

July 2010 - Present

1st Choice HERS Rating, Cathedral City, CA

- Launched and developed energy consulting practice. Services include: HERS I & II field verification, Title 24 energy modeling, HVAC system diagnostics and building performance as a whole-house approach, California energy standards and building code consulting, residential HVAC system design, and BPI Building Analyst
- Certified in air balancing, HVAC system performance, economizers, air distribution, and compliance verifications

Owner/President

August 1979 - September 2006

Danroy Corp, Palm Springs, CA

- Founded, organized, and developed disaster restoration business with annual revenue stream of \$2M+ from ground floor into a multi-division enterprise, consisting of: general contracting and remodeling, mold remediation (IAQ), fire and water damage restoration, emergency services, carpet cleaning, flooring sales and installation, insurance claims, and inspection services
- Managed upwards of 40 employees, subcontractors, project managers, and affiliates
- Developed customer relations, marketing strategies, and all company protocol
- Responsible for administration, field operations, scheduling/dispatching, computer systems, and financial/legal structure
- Communicated with high-profile leaders in entertainment, civic, and business communities

Education

A.S. HVAC/Air Conditioning, A.S. Construction Management

August 2009 - January 2012

College of the Desert, Palm Desert, CA

- GPA 3.97; Additional Certificates in Building Inspection Technology & Construction Management; Concentration in Architecture, Drafting, and Building Performance
- Other college coursework (focus on business and economics): Business, Accounting I/II, Business Law, Economics I/II, Construction Estimating, Uniform Building Code, Computer Science, Marketing, Website Design, Typing, Radio/TV Announcing,

Certifications and Affiliations

- CABEC: Member Board of Directors, Education and Training Committee, CABEC Advantage Board, Advocacy Committee
- Western HVAC Performance Alliance (WHPA) – HVAC compliance committee
- ZNE Technology Advisory Board, College of the Desert
- CABEC: CEPE (Certified Energy Plans Examiner – Res/Non-Res)
- CABEC: CEA (Certified Energy Analyst)
- CalCERTS HERS Rater: Res Alterations, Newly Constructed Homes, Non-Res, Whole House Rater, Solar, RCA
- BPI: Building Analyst (BA), Multi-Family Building Analyst (MFBA), Quality Control Inspector (QCI), Energy Auditor (EA)
- BPI Proctor for the above certifications
- Certified Green Point Rater (GPR) Existing Multi-Family
- Licensed CA Contractor: B-General Bldg, C9-Drywall, C33- Painting & Decorating, C15-Flooring & Floor Coverings
- ICC Certified CA Mechanical Inspector (Residential/Commercial)
- ITC - Level 1 Thermography
- NABCEP: Solar PV Design & Installation Entry Level Training
- CMI/CMRC: Certified Mold Inspector/Remediation Contractor
- EPA Renovator Certification (Lead Renovation, Repair, Painting)
- AHIT: American Home Inspectors Training
- EPA 608-Universal
- NATE: North American Technician Excellence - Air Distribution, Installation & Service
- NCI: Certified Residential/Light Commercial Air Balancing and Diagnostic Technician; NCI: Certified Economizer Specialist
- HVAC Excellence (Employment Ready Certified): A/C, Electrical
- Over 100 Energy Efficiency Training Certificates per SCE EEC, SoCal Gas ERC, CCSE, Advanced HERS Rater Training
- Software: MS Office Suite, EnergyPro, CBECC-Res, AutoCAD, Revit, Wrightsoft Right-Suite Universal

Publications

Eads, Roy. *Equipment Number Registration: Plan for Standards Compliance and Enforcement of HVAC Alterations*. California Energy Commission Docketed 12-EBP-1, TN 71535. July 2013.

Eads, Roy. *2016 Brings Changes to Residential Energy Codes*. California Association of Building Energy Consultants (CABEC) Member Newsletter. Fall 2016.

Eads, Roy. *2016 Energy Code Changes – Ready or Not, Here We Go!* California Association of Building Energy Consultants (CABEC) Member Newsletter. Winter 2017.

W. J. “Pete” Peterson



QA Reviewer & Instructor

Qualifications

- 11+ years as Quality Assurance Reviewer, Trainer/Proctor and Strategic Alliance with CalCERTS
- Strong knowledge of diagnostic testing procedures and associated regulations.
- Strong understanding of energy related features in residential construction.
- Extensive knowledge of California Building Energy Efficiency Standards Title 24, Part 6.
- Lead So CA instructor of CalCERTS Title 24 curriculum.

Professional Experience

PRESIDENT | ENERGY EFFICIENCY & CONSERVATION TECHNOLOGIES | 2010 - PRESENT

- Energy consulting services as a CalCERTS Certified HERS Rater/BPI Building Analyst & Envelope Specialist.
- Performed Quality Assurance review of Duct and Blower Door Leakage; Refrigeration charge & Airflow; Fan Efficacy; Quality Insulation Installation; HERS II Whole House; Energy Efficient Mortgages; Non Residential; Energy Star/Special Energy Programs; and Photovoltaic/Solar evaluations and ratings.
- CalCERTS' staff (2011-2012). Performed combustion analysis/safety tests in support of San Diego's Energy Upgrade California Multifamily Housing Program.
- Perform QA Reviews, assist with Rater FV/DT training, and proctor Title 24 HERS Compliance Examinations.

RESOURCE/SENIOR RESOURCE/MAINTENANCE TEAM LEADER | PEPSICO | 1997 - 2010

- Managed and developed teams of 5-45 mechanics/technicians across 3 shifts.
- Directed projects that promoted processing equipment; high speed packaging; service & distribution; plant facilities; energy efficiency and resource conservation enhancements.
- Similarly doubled as the resident environmental compliance expert.
- Employed coaching, mentoring, interpersonal, and technical skills to analyze and resolve issues and promote continuous improvement (developed work group to level 3 of 4 CI levels).

Military Background

COMPANY COMMANDER | UNITED STATES MARINE CORPS

- Standardized maintenance procedures for various organizations employing 45-1000 workers. Oversaw equipment maintenance and repair, and directed the maintenance and spare parts procurement efforts of personnel with over 25 various technical skills (including 20

- plus commissioned officers). Served on Commanding Officer's special planning staff for all operations involving equipment maintenance/reliability.
- Spearheaded audit teams that conducted over 100 detail analysis of logistics and maintenance management policies and procedures for 50 plus maintenance organizations. Functioned as the Commandant of the Marine Corps' direct field representative in analyzing the effectiveness of maintenance management policies and procedures for all ground tactical equipment in the western division of the U.S.
- Managed logistics and maintenance planning for deployment of units varying in sizes from 100 to 1200. Identified logistics and technical skill requirements. Trained personnel and oversaw the performance of preventative and corrective maintenance.
- Developed programs of instructions and conducted formal training in engineer construction and utilities equipment (electrical, water distribution, and HVAC systems) maintenance. Conducted job analysis, determined performance objectives, and established evaluations standards to measure training performance. Served as Company Commander/Chief Instructor at Marine Corps Engineer Schools.
- Troubleshoot, diagnosed and repaired electrical power distribution, engineering heavy construction, water distribution and HVAC systems. Performed as enlisted repair technician.

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2005557
- Energy Star/Special Energy Programs
- HERS H20
- EPA 608 Certification
- BPI Envelope Professional
- BPI Building Analyst
- BPI Multifamily Building Analyst

Education

MS: HUMAN RELATIONS MANAGEMENT | GOLDEN GATE UNIVERSITY

BA: PSYCHOLOGY | EAST CAROLINA UNIVERSITY

BA: SOCIOLOGY | EAST CAROLINA UNIVERSITY

Quality Assurance Reviewer & Instructor

Qualifications

- CalCERTS certified Title 24 HERS Compliance Rater.
- Strong knowledge of California Building Energy Efficiency Standards Title 24, part 6.
- Over 20 years of experience in the area of residential and commercial construction.
- Strong knowledge of diagnostic testing procedures and associated regulations.
- Strong understanding of energy related features in residential construction.
- CABEC Certified Energy Analyst (CEA)

Professional Experience

PRINCIPAL | HERS RATER SOCAL | 2016 - PRESENT

- Management of company Air Balance and HERS verification staff.
- Inspecting, testing, balancing, and commissioning of residential and commercial HVAC systems.

OWNER | DWC GENERAL CONTRACTORS | 1997 - 2016

- Formed and oversaw all operations, including estimating, personnel, and client interface.
- Developed company website and devised and employed all marketing and sales strategies.
- Interfaced regularly with high profile clientele, while working as a preferred vendor for major insurance companies, including AIG Private Client Group, Liberty Mutual, and Safeco.
- Worked as a construction consultant, providing expertise in estimation and negotiation of settlements.
- Worked as a consultant and umpire in dispute resolution and arbitration for legal settlements in the construction arena.

ADJUNCT PROFESSOR | BIOLA UNIVERSITY | 2011 - 2013

- Taught everything from Shakespeare to 18th Century Philosophers
- Teaching modeled after Oxford's collegiate education model

CONSTRUCTION PROJECT MANAGER | HAR-BRO | 1995 - 1997

- Marketed and developed new Insurance Industry clientele, including Prudential Insurance.
- Bid and ran jobs ranging from \$5,000 - \$2,000,000.

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2016004
- Energy Star/Special Energy Programs
- NCI Commercial Air Balancer
- CABEC CEA

Education

MA: PHILOSOPHY | TALBOT THEOLOGICAL SEMINARY

BA: COMMUNICATIONS | BIOLA UNIVERSITY

Quality Assurance Reviewer

Qualifications

- CalCERTS certified Title 24 HERS Compliance Rater.
- Strong knowledge of California Building Energy Efficiency Standards Title 24, part 6.
- Strong knowledge of diagnostic testing procedures and associated regulations.
- Strong understanding of energy related features in residential construction.
- Building Analyst Professional-Building Performance Institute, Inc.
- BPI GoldStar Contractor
- Home Energy Score Assessor Professional Experience

Professional Experience

OWNER | LOWER HOME ENERGY | 2010 - PRESENT

- Conduct comprehensive energy audits on single family homes to increase customer awareness and generate sales.
- Build energy models for audit reporting, energy savings and incentives calculation. Title 24 compliance.
- Perform utility analysis for PV system sizing and identifying energy conservation opportunities.
- Provide BayREN Contractor Service Support.
- Implement and administer Salesforce program data management and project tracking.
- Support and manage a team of auditors to ensure all staffing needs are met.
- Conducting home energy scoring to uncover energy and GHG emissions saving opportunities.

Military Background

UNITED STATES MARINE CORPS

- Kuwait Liberation Medal
- National Defense Service Medal
- South West Asia Service Medal

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2006168
- BPI GoldStar Contractor
- Building Analyst Professional-Building Performance Institute, Inc.

Education

BS: PROFESSIONAL AERONAUTICS | EMBRY-RIDDLE AERONAUTICAL UNIVERSITY
AP LICENSE | SIERRA ACADEMY OF AERONAUTICS

Quality Assurance Reviewer

Qualifications

- 20+ years of experience in HVAC design, energy consulting, home energy rating systems, code applications, engineering department management, technical training and other related duties.
- Extensive experience training, working with and communicating with HVAC contractors, builders, code enforcement officials, utility personnel, architects, engineers, drafters, salespeople and homeowners.
- Strengths include teaching, technical writing, problem solving, and technical design.

Professional Experience

CEO/FOUNDER | CODED ENERGY | 2021 - PRESENT

- Developed revolutionary Kwik Model 3D HVAC design and modeling software.

SENIOR DIRECTOR OF TRAINING | CALCERTS | 2017 - 2021

- Responsible for a variety of technical aspects of a State of California approved Home Energy Rating System (HERS) Provider.

VICE PRESIDENT ENERGY SERVICES | BENNINGFIELD GROUP | 2014 - 2017

- Manage various consulting and contracts, including energy code training to building departments, utility energy upgrade programs, and code compliance improvement.

OWNER | SIERRA BUILDING SCIENCE | 2005 - 2015

- Started and managed a technical training and consulting facility/company specializing in residential HVAC and energy efficiency training and consulting.

VICE PRESIDENT TECHNICAL SERVICES | CALCERTS | 2010 - 2012

- Primary training curriculum developer and trainer. Responsible for a variety of technical aspects of a State of California approved Home Energy Rating System (HERS) Provider.

MECHANICAL ENGINEER | CONSOL | 1996 - 2005

- Manager of Mechanical Engineering Department. Responsible for department management and supervision of day-to-day mechanical design activities.

DIRECTOR OF TECHNICAL SERVICES | CONNERLY & ASSOCIATES | 1993 - 1996

- Manager Associate Consultant. Managed a variety of technical consulting projects including the design and testing of a statewide residential energy audit. Responsible for the technical development and administration of training programs for California Building Officials Training Institute (CTI), Managed several California Energy Commission (CEC) training contracts. Managed the Certified Energy Plans Examiner testing and certification program for three years, 1994-1996.

Certifications & Licenses

- CalCERTS Title 24 HERS Rater #CC2004067
- Nevada Registered Professional Engineer (Mechanical) #13061
- Certified Residential Energy Plans Examiner #RES-88-2012 (inactive)
- BPI Analyst, Envelope Specialist, Multifamily (inactive)
- California Registered Professional Engineer (Mechanical) #M028952
- Hawaii Registered Professional Engineer (Mechanical) #12661
- Certified Nonresidential Energy Plans Examiner #NRE-90-4009 (inactive)

Education

BS: ENVIRONMENTAL RESOURCES ENGINEERING | HUMBOLDT STATE UNIVERSITY