



## Spring 2024 IN-PERSON MEMBER MEETINGS

We had a great two days of meetings in Sacramento! Thanks to everyone who joined us in person and virtually. We also had a very successful “first-ever” Advocacy Day where we engaged with the offices of (5) legislators.

CEA would also like to thank our meeting host [SMW Local 104](#)!

A few important reminders are below and meeting highlights/notes follow the agendas. Additional meeting resources and presentations have been uploaded to the [Member Resources](#) page. For our guests, the meeting resources are available [here](#) and meeting recordings can be found here – [Day 1](#) and [Day 2](#).

### Meeting Action Items:

- March 20th Business Meeting - this will be more of an "open office hours" and time for the WGs to meet.
  - C&S Working Group
    - Divide out the Energy Code sections to review 45-day language
    - Begin outreach/interview questions for Seattle and Boulder
  - Gov't Affairs Working Group
    - Plan check-in meetings for 2024
    - CEA received requests to support bills from Senator Becker and others. This group will need to review and determine CEA support.
  - All WGs add due dates and assign tasks to members in Hive
- Fall 2024 In-Person Member Meetings - San Diego
  - We are planning the next in-person meetings for the week of October 7th to take place in San Diego, CA. We hope this week works best for most and does not overlap with other events. In addition to the 2 days of meetings, we will also be planning a Golf Tournament the day after the member meetings.
  - Please complete the following poll **before April 5th**, so we can get a save-the-date out.
    - [Doodle Poll](#)
- CEA is coordinating a follow-up meeting with the CEC to discuss compliance challenges and solutions.



## Spring 2024 IN-PERSON MEMBER MEETINGS - DAY 1

March 6, 2024, 1:00 p.m. to 6:00 p.m. PT

Location: SMART, SMW Local 104 Union Hall  
4040 Lennane Dr, Sacramento, CA 95834

### AGENDA

#### Advocacy Day

8:00 a.m. – Noon Meetings organized with State Legislators and their Staff to discuss CEA Initiatives. To be held at Capitol Offices.

#### Afternoon Meetings

- 1:00 p.m. Welcome & Meeting Overview
- *Josh Dean, CEA Executive Director*
- 1:15 p.m. CEA General Business
- *Dion Abril, CEA President & Board Chair*
  - *Josh Dean*
- 1:45 p.m. Introduction to Outcome-Based Policies
- OBP Principles, Terminology, & Goals
    - Highlight similar policies around the U.S.
    - CA SB-48 (Roadmap for Statewide BPS)
  - Discuss what's in & out of scope for CEA OBP
- 3:00 p.m. Break (10 minutes)
- 3:10 p.m. Working Group Breakouts
- Finalize Tasks, Timeline, & Outcomes
  - *Codes & Standards*
  - *Compliance & Enforcement*
  - *Government Affairs & Advocacy*
- 4:45 p.m. Working Group Report Back
- Each WG to share their goals and tasks
  - Will incorporate feedback into OBP Strategy
  - *All*
- 5:45 p.m. Day 1 Wrap-Up
- *Josh Dean*



6:00 p.m. Adjourn

- 6:00 – 8:00 p.m. Evening Reception w/ Guests
- *Location: SMART, SMW Local 104 Union Hall*
  - *4040 Lennane Dr, Sacramento, CA 95834*
  - *Drinks & Hors d'Oeuvres*

## **Spring 2024 IN-PERSON MEMBER MEETINGS - DAY 2**

March 7, 2024, 8:00 a.m. to 4:00 p.m. PT

Location: SMART, SMW Local 104 Union Hall

4040 Lennane Dr, Sacramento, CA 95834

## **AGENDA**

### **Morning Session**

- 8:00 a.m. Breakfast
- 8:30 a.m. Welcome, Meeting Overview, & Day 1 Recap
- *Vote on Fall 2024 In-Person Meetings*
  - *Josh Dean, CEA Executive Director*
- 8:45 a.m. 2024 CEA Advocacy Day Recap
- *Share feedback from meetings and networking event*
  - *Discuss Position Statements, Key Topics, & Goals*
- 9:30 a.m. Break (5 minutes)
- 9:35 a.m. Guest Presentation - "Energy Decarbonization Blueprint"
- *Jack Tesar, Energy Specialist, Willdan*
  - *Description: Utilizing four case studies, this course explores how to create a new blueprint for energy decarbonization that aligns with the changing electric grid. An overview of energy infrastructure changes that are taking place in the state of California will be provided alongside how these changes impact the types of building systems being considered for a multi-family building, a school, a healthcare project, and an office building. The course will explore the carbon impacts of each case study, both today and in the future as the electric grid continues to decarbonize utilizing expected average carbon emissions for 2030 and 2050.*



- 10:45 a.m.                    2025 Energy Code 45-Day Language / CEC BPS Roadmap
- *Placeholder for these Options*
    - Option 1: 2025 Energy Code - Review, develop comments, identify sub-group to submit comments letter
    - Option 2: Learn about CEC's role in developing a Building Performance Standard Roadmap per Senate Bill 48
    - Option 3: Continue OBP Discussion and focus on OBP Strategy/Research/Funding/Partners
- 11:55 a.m.                    Morning Session Wrap-Up
- *Josh Dean*
- 12:00 p.m.                    Lunch Break**
- Afternoon Session**
- 1:00 p.m.                    Overview of Afternoon Session
- *Josh Dean*
- 1:05 p.m.                    Team Building Exercise
- Learn more about your fellow Members and their Impacts
  - *All*
- 2:00 p.m.                    OBP Initiative Next Steps
- Outreach & Education - Brainstorm Ideas
  - SWOT Analysis
- 3:00 p.m.                    Spring 2024 Meetings Wrap-Up
- Each WG to share what they are going to accomplish in the next 3-6 months and by end of 2024
- 4:00 p.m.                    Adjourn

## Spring 2024 Member Meeting Highlights:

- CEA hosted its first In-Person Member Meetings of 2024 on March 6th and 7th in Sacramento, CA. CEA would like to thank all Members and Guests that participated and [Sheet Metal Workers Local 104](#) for hosting the meetings. During the meetings, CEA Members:
  - discussed highlights from the Advocacy Day;
  - had a deep dive into outcome-based codes and building performance standards;
  - hosted staff from the [California Energy Commission](#) (CEC) to share updates on code development and compliance & enforcement research;
  - finalized Working Group tasks and goals for 2024
  - hosted a guest presentation from [Willdan](#) on "Energy Decarbonization Blueprint"; and
  - identified outreach & education opportunities for the Outcome-Based Policies (OBP) Initiative.
- Additional Meeting Notes, Highlights, and Action Items from the 2 days are below.
- **Day 1:**
  - Advocacy Day – March 6th
    - CEA hosted its first-ever day at the Capitol. CEA Staff (Josh Dean and Bernadette Boudreaux) along with Members (Bernie Kotlier – Labor Management Cooperation Committee, Dion Abril – Western States Council, & John Busch – Leviton) met with the offices of (5) State Legislators.
    - Meetings with Legislators
      - Senator Angelique Ashby
      - Senator Dave Cortese
      - Assemblymember Al Muratsuchi
      - Assemblymember Cottie Petrie-Norris
      - Assemblymember Damon Connolly
    - Priorities discussed:
      - CEA
        - Introduced CEA, our Members, and current research activities
        - Provided updates on CEA's OBP Initiative
        - Discussed concerns with energy code noncompliance and potential solutions to give the CEC/CPUC authority to perform measurement of compliance after certificate of occupancy (OBP).
      - Legislators
        - Generation, Transmission, & Transportation
        - They were glad we were getting an early start on our legislation ideas. Additionally, anything we can do to provide data regarding bill proposals helps them out.
        - Support on Current Bills
          - SB-1298 Bill regarding diesel backup power for Data Centers
      - Follow up action items:

- Send a memo recapping the meetings, pointing them to our Compliance & Enforcement work, and offering CEA's expertise on any of their upcoming bills.
  - Coordinate check-in meetings with the legislator's we met with and meet with ones on chairing the energy-related committees we were unable to meet with on this day.
  - CEA to host an event near the Capitol to provide awards and engage legislators further.
- General Business Updates
  - Join CEA at the 2024 [Sacramento Earth Day](#)
    - April 21st – 11:00 am – 4:00 pm
    - Sacramento (Southside Park)
    - CEA Fellows, Melissa Fraire-Rodriguez & Anam Shafique, along with Bernadette Boudreaux will be providing education & outreach to the public on CEA initiatives and how to decarbonize the built environment.
  - Member Engagement
    - Survey and member impact
    - Please complete [this membership survey](#) if you have not already done so. An email went out on March 5<sup>th</sup> with an updated survey link.
  - Catch CEA Members speaking at the following conferences:
    - LEDucation (New York City)
      - March 19th - 20th
    - LightSPEC West (Anaheim)
      - April 17th - 18th
      - Lawrence Lamontagne & Michael Scalzo
      - Promo code: CEA24 to register for FREE
    - CxEnergy Conference (San Diego)
      - April 29th - May 2nd
      - "Guaranteeing Optimal Lighting Control System Performance"
      - Michael Scalzo, John Busch, Charles Knuffke
      - Promo code: SUPPORTING10
    - DOE National Energy Codes Conference (Sacramento, CA)
      - May 6<sup>th</sup> – 8<sup>th</sup>
      - If any members will be in Sacramento for this event, please let Josh ([josh.dean@caenergyalliance.org](mailto:josh.dean@caenergyalliance.org)) know and we can coordinate a meetup.
  - In other news:
    - ASHRAE Standard 100-2024 has been released
    - IECC 2024 is going through an appeal process due to potential rollbacks in efficiency stringency. Should know about the appeal by the end of March 2024.
    - ASHRAE TC 7.9 is basing their requirements on CalSHAPE.
      - Chris Ruch shared that Guideline 42 is focused on enhanced IAQ while considering energy efficiency.
        - He suggested that CEA could host a training on this topic to demonstrate a practical use case.

- Level Setting - Outcome-Based Policies (OBP)
  - The [Day 1 recording](#) has this OBP overview starting at the 28 minute mark.
  - Josh Dean walked through an overview of outcome-based topics/initiatives at CEA and discussed where we are today with OBP. This has been an effort from CEA since its inception, but lots of questions still remain. And with the proliferation of Building Performance Standards (BPSs) across the country and now in CA, how does this new existing building reporting mechanism impact new energy codes. As CEA wants to explore this further, he highlighted some differences, similarities, and key terms. He also highlighted entities engaged in this work and leading up various efforts on this topic.
    - Define OBC vs BPS and how they're connected
      - Outcome-Based Code uses actual, measured energy use as the overarching metric for demonstrating code compliance for design to operations.
      - BPS - mandatory policies that require building owners to meet performance targets by actively improving the energy performance of their building over time.
  - He also gave a background on the differences between Outcome-Based Codes and Building Performance Standards. He shared graphics, terminology, and processes for each policy and discussed where they are currently in place across the U.S.
    - Key locations with an OBC in place are Seattle, WA and Boulder, CO. The group discussed how these two regulations are similar and different, and they decided that the CEA Codes & Standards (C&S) Working Group would re-engage with Seattle and Boulder to learn more about the implementation of these code compliance pathways.
    - The group also discussed where BPS are currently in place and what's coming in CA per Senate Bill 48. This bill tasks the CEC with developing a BPS Roadmap for the state. The roadmap is to be delivered to state legislature by June 2026. The CEC has just started this process internally and will be looking to organizations, such as CEA, for input and collaboration on this roadmap.
  - While there are a lot of examples of OBC and BPS being part of regulations/ordinances across the U.S., there are still many questions to research for CA especially as CEA pursues alignment between new energy codes and ongoing energy performance.
    - Some key takeaways from presentations from other groups and discussions at this meeting include:
      - Get involved in the CEC's BPS Roadmap development
      - Focus on getting "enabling technologies" into new energy codes

- This includes metering/submetering, fault detection & diagnostics, and ongoing commissioning requirements.
  - Need to develop similar metrics to be used for both design/new construction compliance and existing building energy use.
- OBP Resources:
  - [CEA OBP Initiative](#)
    - [Link to OBP Jamboard](#)
  - [California Energy Commission](#) – Building Energy Efficiency
  - [DOE Building Energy Codes Program - BPS](#)
  - [Institute for Market Transformation](#)
  - [City of Seattle](#)
  - [City of Boulder](#)
  - [EPA Design to Earn Energy Star](#)
  - [Green California](#)
    - [CA Green Building Action Plan](#) – per Executive Order B-18-12
    - [State of CA Green Buildings](#) – savings and usage data tracking
- Working Group Breakouts
  - This was an opportunity for WGs to join their small groups to discuss the overall timeline of OBP, their WG tasks, develop areas of overlap with other WGs, and begin populating these items in Hive. Here is a breakdown of the WGs supporting the OBP Initiative.
    - Outcome-Based Policies - Strategy
      - Jon Zelinsky, Prasino Energy
      - Dema Tzamaras, Center for Sustainable Energy
    - Codes & Standards (C&S)
      - Dan Salinas, Salinas Lighting Consult
      - Michael Jouaneh, Lutron
    - Compliance & Enforcement (C&E)
      - Dan Suyeyasu, CodeCycle
      - Michael Scalzo, National Lighting Contractors Association of America
    - Government Affairs & Advocacy
      - Josh Dean, CEA
      - Bernie Kotlier, Labor Management Cooperation Committee
      - Dion Abril, Western States Council
  - After the breakouts, the WGs shared what they discussed, what their focus will be on for the next 3-6 months, and areas of overlap with other groups.
    - C&S
      - CA Energy Code 45-day language will be a key focus the next couple of months. Once this language is released the WG will lead up review, comments collection, and letter submission to the CEC docket.



- Need to complete a breakdown of Energy code sections for members to focus on prior to the language being released.
  - **Action items:**
    - Will reach out to Seattle and Boulder to learn more about their OBC pathways and if they are/are not being utilized by projects.
    - Will review other codes & standards (e.g., other parts of Title 24, Title 20, Load Mgmt Standards, etc.) for potential ways to introduce OBP principles into codes.
- C&E
  - This working group had the opportunity to meet with CEC staff about the noncompliance concerns and shared more about CEA's Acceptance Testing (AT) Questionnaire. They walked through the questions and identified a couple of contacts to support the methodology and analysis development for CEA.
  - **Action items:**
    - Send draft survey to Nancy Ander at the CEC to provide further input on questions.
    - Reach out to potential research institutes to support survey analysis.
    - Coordinate a meeting with CEC compliance staff to discuss compliance challenges and solutions further. Everyone agreed that this meeting needs to happen sooner rather than later. The AT survey would help provide CEC with specific data on how big the compliance problem is across the state.
- Govt Affairs
  - This WG discussed the recent Advocacy Day and lessons learned from those discussions. They will continue to update CEA's database of legislators & regulatory officials to keep in touch with throughout 2024 to continue discussing legislation ideas.
  - This group would like to host a 2nd round of meetings in mid-April to meet with legislators/their offices that were not available on March 6<sup>th</sup>.
  - They also want to host an event later this year to award legislators and to engage more of them at once.
  - **Action items:**
    - Schedule April legislative meetings
    - Review the requests for letters of support from:
      - Senator Becker
      - SB 366
      - SB 1148
- Day 1 one meetings wrapped up with a happy hour sponsored by **Sheet Metal Workers Local 104** and **Western States Council**. CEA appreciates their support and thanks all attendees for a lively day of discussions!

- **Day 2**
  - The 2<sup>nd</sup> day of meetings began with a recap of Day 1 with highlights from the breakout discussions, appreciation for all the interaction and input from CEC staff, what to expect for Day 2 discussions, and a recap of the Advocacy Day meetings.
  - Fall 2024 Member In-Person Meetings
    - The group discussed possible dates and location for the Fall member meetings. Josh Dean added that the Board is trying to organize the second golf fundraiser to coincide with these Fall meetings.
    - The group decided that the meetings will be held in San Diego, CA during the **week of October 7<sup>th</sup>**.
    - **Action item:**
      - Complete feedback on this Doodle Poll for your availability the week of Oct. 7<sup>th</sup> to host the Fall meetings:
        - [Doodle Poll link](#)
  - Guest Presentation – “Energy Decarbonization Blueprint”
    - CEA welcomed [Jack Tesar from Willdan](#) to present on “Energy Decarbonization Blueprint”
      - Description: Utilizing four case studies, this course explores how to create a new blueprint for energy decarbonization that aligns with the changing electric grid. An overview of energy infrastructure changes that are taking place in the state of California will be provided alongside how these changes impact the types of building systems being considered for a multi-family building, a school, a healthcare project, and an office building. The course will explore the carbon impacts of each case study, both today and in the future as the electric grid continues to decarbonize utilizing expected average carbon emissions for 2030 and 2050.
      - This presentation sparked many questions and lively debates about how the state will decarbonize the grid and the built environment. CEA looks to continue these discussions and potential collaboration with Willdan on the decarbonization topic.
  - Transactive Energy
    - Based on discussions from the presentation from Jack, Josh Dean brought up a topic that has recently been presented to him for engagement with CEA. The idea of Transactive Energy came about from discussions at a recent GridWise Architecture Council meeting. Energy Profit, LLC brought an idea of collaborating with CEA on this topic and developing ways to get grid-enabled technology into the market to work with 2-way communication.
      - This topic aligns with the CEC’s Load Management and Flexible Appliance Standards and the CPUC’s CalFUSE framework.
    - There were a lot of questions about this topic and about how CEA would fit in. Peter Schwartz was able to provide a lot of insight as he researched this topic for many years at LBNL.

- **Action item:**
  - CEA to host a webinar on this topic and how CEA can engage in it. Ask Peter Schwartz and Stephen MacDonald (Energy Profit, LLC) to present.
- 2025 Energy Code / OBP Open Discussion
  - The group used this time to discuss the upcoming release of the Title 24, Part 6 – Energy Code 45-day language. The CEC stated that this language should be released late March/early April.
    - The C&S Working Group shared that they would like to set up the breakout of sections similarly to how the CLTC Lighting Language Cleanup project was done. Josh said that he can work with the C&S team to develop this breakdown.
    - Josh Dean also shared some energy code comments from Daikin that were docketed late last year, but they were concerned they were not a part of the draft language.
      - These comments are to be added to CEA’s comment letter for 45-day language.
  - The group also discussed some of the CEA-sponsored code proposals that were not included in the 2025 code update. These include Fault Detection & Diagnostics and Mandatory Metering. Since these two measures are enabling technologies and align with recommendations for bridging the gap between new to existing buildings, the group will look to other codes & standards for possible inclusion.
    - Josh shared that CALGreen (Title 24, Part 11) could be a good place for these and that he has spoken with the Building Standards Commission about this. The goal would be to workshop the measures with possible inclusion in the intervening code cycle.
    - Jack Tesar from Willdan shared that PG&E is pushing circuit level metering and monitoring in multifamily as part of their programs. Willdan is feeding the data back to PG&E for future code development.
      - Josh asked how PG&E was going to account for cost effectiveness for future codes, since the cost-effectiveness test does not work well with these types of code strategies?
        - Jack wasn’t sure, but they discussed this would be a good area of collaboration between CEA and Willdan.
- Team Building Exercise
  - The group took the time to breakout into groups of 2 to interact with a member they do not know well. This was an excellent opportunity to learn more about a fellow member and their organization.
  - Each group presented to everyone and shared fun facts about the person.
  - Thanks to Bernadette Boudreaux for coming up with this engaging exercise!
  - There was a winner for who delivered the fun facts the best. Congrats to Peter Schwartz! He’ll be receiving a CEA canvas bag.
- Education & Outreach

- As CEA reorganizes its initiatives around OBP, there is a need to update the CEA website. Josh asked the group for feedback on the current website and how we can update it to be more navigable to first time users. The goal would be to update many of the headings as we will be focusing on the key initiative of OBP.
  - Suggestions for the website include:
    - Change initiative to “How We’re Decarbonizing the Economy”
      - OBP> C&S-C&E-Advocacy
    - Keep it to 2 clicks to get where site user needs to go for info
    - Have our YouTube videos and short clips on the homepage
    - Promote the CEA YouTube page more
    - Update our Candid year
    - Make sure that CEA does not look like a trade org. We’re a group trying to improve the environment.
    - Showcase CEA’s impact on codes, standards, and policy.
- In addition to the website, we will also want to make sure we are targeting different demographics with our outreach materials. Josh also requested feedback from the group on how to best do this and through which media channels.
  - Outreach ideas:
    - Sacramento Earth Day – have materials ready to explain OBP and Energy Policy in CA
    - Host another Convening – focus on the topic of OBP
      - Need to determine date/location
      - Identify list of stakeholders
      - Look to prior discussions on this (i.e., NBI)
      - New video similar to “A tale of two buildings”
        - Maybe we can use that video and reword this to GEBs and OBP?
    - Develop more education and host webinars on OBP
    - Hone in on CEA’s impact
      - Point to code changes
      - Calculate our code change metrics for energy/GHG savings
      - Point to work on compliance & enforcement
    - CEA can help explain the process of building design>construction>inspection/enforcement>operations>ongoing enforcement
- One major thing that came out of this discussion is the outdated language in the Warren Alquist Act (WAA).
  - Josh point out that 2024 makes WAA 50 years old. The group discussed developing targeted outreach about the difference in technology and energy efficiency over the last 50 years.
  - This could help update Cost-effectiveness metrics
  - WAA needs major overhaul to bring the language up to date
- Biggest Opportunities & Roadblocks



- CEA wrapped up the Spring 2024 meetings doing a round robin of the biggest opportunities and hurdles for CEA to implement OBP. Key feedback included:
  - Need more people (i.e., mechanical SMEs) to support code review.
  - Connect with organizations focused on benchmarking and supporting large real estate portfolios. Look to AEC community.
  - Share OBP info with CEA members. Get everyone speaking the same language.
  - Engage with CEC further on this topic. Develop a tracker of meetings with CEC and CEA to know what was discussed and assignments.
  - Develop a CEA Roadmap for OBP
  - Complete ATT survey so we can have data to point to for compliance.
  - Engage more CEA members to participate on Working Groups.

On behalf of CEA, thanks to everyone for taking time out of their busy schedules to participate in these meetings. We always get the most when we can meet in person as a group and focus completely on the pressing issues. Without the support and dedication of our Members, we would not be able to work towards our Vision. We look forward to advancing the OBP Initiative throughout 2024 and hope to see everyone in San Diego in the Fall!