

# Energy Efficiency Management Certificate Program

May 15–19, 2017 ■ Spring Education Institute ■ Minneapolis, MN

**New Content  
and Instructors!**

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## Program Requirements

To earn this certificate, participants must complete the following requirements within one year:

### Complete the five required courses

- Electric Utility Industry Overview: Strategic Challenges and Trends\*
- Introduction to Energy Efficiency Programs and Technologies
- Energy Efficiency Goal-Setting and Strategy Development
- Energy Efficiency Program Design and Implementation
- Measurement, Evaluation, and Data Systems for Energy Efficiency Programs

### Pass an online exam

### Submit an energy efficiency program business plan

## 2017 Schedule

The Energy Efficiency Management Certificate Program courses are held once a year.

### May 15–19, 2017

As part of the Spring Education Institute

### Hotel Information

Hilton Minneapolis  
1001 Marquette Avenue  
Minneapolis, MN 55403

### APPA Room Rate

\$189 Single/Double

### Room Rate Cut-off Date

April 24, 2017

### Reservations

612/376-1000

## In-House Training

We can bring these courses to your location — a convenient and cost-effective option for groups.

For more information, contact APPA's Education Department at [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org).

\* Participants who can demonstrate advanced knowledge of the utility industry, through work experience or coursework, may opt-out of this course. Contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) for more information.



## Program Description

Who manages energy efficiency programs at your utility? Are they up to speed with the latest trends, technologies, policies, and requirements? Successful programs do not happen by accident—they require an understanding of the industry, marketplace, customers and many other elements. When done well, energy efficiency can play an important role in achieving utility goals and improving customer service.

APPA's Energy Efficiency Management Certificate Program covers all aspects of energy efficiency portfolio and program planning, implementation, and evaluation, preparing you to help residential, commercial, and industrial customers save energy, while enjoying high reliability and quality service.

To earn an Energy Efficiency Management Certificate, participants must complete the five required courses and then, within a year of completing the coursework, pass an online exam and submit an energy efficiency program business plan. Courses can be taken individually or together as part of the certificate program.

## Who Should Attend

Staff from small, medium, and large public power utilities that:

- Want to start an energy efficiency program
- Are interested in various aspects of energy efficiency
- Already manage energy efficiency programs but want to scale them up
- Want to earn a professional credential

# Coursework

Courses can be taken individually or as part of the certificate program.

## Electric Utility Industry Overview: Strategic Challenges & Trends\*

**Monday, May 15**

8:30 a.m.–4:30 p.m.

*Recommended CEUs .7/PDHs 6/CPEs 7.5*

*Field of Study: Specialized Knowledge and Applications  
For CPE Accreditation, this course is a group-live offering.*

### Course Overview

This course provides a largely non-technical overview of the public power system in its broader operating and business management context. Learn about the electric utility system infrastructure from power grid to meter, its operation, performance, and development. Strategic issues and industry trends that are impacting utilities and challenging the traditional public power business model will also be discussed. Each attendee will receive a copy of APPA's Electric Utility Basics handbook.

### Course Topics

- Electric utility industry regulation and market restructuring
- Developments in generation and regional transmission
- Developments in local transmission and distribution infrastructure
- Strategic issues and trends for electric utilities
- The public power business model
- How changes in the industry are affecting local public power systems

### Course Level

**Basic.** This course does not have prerequisites and does not require advance preparation.

### Instructor

R. John Miner, P.E., President, Collaborative Learning, Inc.

\* Participants who can demonstrate advanced knowledge of the utility industry, through work experience or coursework, may opt-out of this course. Contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) for more information.

# Introduction to Energy Efficiency Programs and Technologies

**Tuesday, May 16**

8:30 a.m.–4:30 p.m.

*Recommended CEUs .7/PDHs 6/CPEs 7.5*

*Field of Study: Specialized Knowledge and Applications  
For CPE Accreditation, this course is a group-live offering.*

## Course Overview

Get an introduction to successful key energy efficiency and demand reduction concepts and programs, from lighting and weatherization to advanced smart grid options. Learn about solutions that help residential, commercial, and industrial customers save energy and position your utility to provide a high level of customer service and reliability. This course includes an overview of various cost-effective energy efficiency technologies, programs for all sizes of municipal utilities and key energy efficiency resources.

## Course Topics

- Defining energy efficiency, demand response, and associated concepts
- Energy efficiency in the context of utility operations and energy supply
- Federal and state landscape and policies, including the Clean Power Plan
- Common energy efficiency measures — lighting, heating, ventilation, air conditioning
- Emerging technologies — LEDs, smart thermostats, super-efficient clothes dryers, efficient rooftop units, and advanced smart grid
- Cost effective programs for different customer classes — prescriptive and custom rebates, upstream programs, behavior programs, etc.
- Common utility efficiency program portfolios for residential, business, industrial, and low-income customers

## Course Level

**Basic.** This course does not have prerequisites and does not require advance preparation.

## Instructor

Rebecca Foster, Director, Vermont Energy Investment Corporation



# Energy Efficiency Goal-Setting and Strategy Development

**Wednesday, May 17**

8:30 a.m.-4.30 p.m.

*Recommended CEUs .7/PDHs 6/CPEs 7.5*

*Field of Study: Specialized Knowledge and Applications  
For CPE Accreditation, this course is a group-live offering.*

## Course Overview

Identify your utility's energy efficiency goals, growth drivers, and market potential. Gain strategic planning tools to translate your energy efficiency goals into a portfolio strategy. Learn how to design an energy efficiency program mix that achieves the benefits while watching the cost.

## Course Topics

- A strategic planning framework and tools for energy efficiency portfolio planning
- Energy efficiency regulation and integrated resource planning
- Using energy efficiency to support utility goals, such as reducing peak load, improving customer service, and promoting economic development
- Aligning energy efficiency portfolios with the utility's strategic plan and goals
- Ways to assess energy efficiency savings through baseline and potential studies
- Techniques to evaluate cost-effectiveness

## Course Level

**Basic.** This course does not have prerequisites and does not require advance preparation.

## Instructor

Cheryl Jenkins, Associate Director, Vermont Energy Investment Corporation

# Energy Efficiency Program Design and Implementation

**Thursday, May 18**

8:30 a.m.-4.30 p.m.

*Recommended CEUs .7/PDHs 6/CPEs 7.5*

*Field of Study: Specialized Knowledge and Applications  
For CPE Accreditation, this course is a group-live offering.*

## Course Overview

Create a business plan for successful program design and implementation. Learn from real-world program examples, ranging from efficient product programs to commercial programs that provide customized assistance to help your largest customers save energy. Apply a step-by-step approach to assess the market, design and implement an energy efficiency program, and improve program success. Learn how to match program design and complexity to utility resources, and practice these skills through interactive exercises.

## Course Topics

- Market assessment — identifying customer barriers and motivations and using market research techniques to inform program design
- Program design — selecting a program approach to match utility and customer goals and resources to overcome customer barriers
- Program implementation — developing a business plan that includes all aspects of program delivery, including goal-setting, incentives, marketing, and outreach
- Tools, resources, and templates to support program planning and budgeting

## Course Level

**Basic.** This course does not have prerequisites and does not require advance preparation.

## Instructor

Emily Levin, Manager of Program Strategies, Vermont Energy Investment Corporation

# Measurement, Evaluation, and Data Systems for Energy Efficiency Programs

**Friday, May 19**

8:30 a.m.-4.30 p.m.

*Recommended CEUs .7/PDHs 6/CPEs 7.5*

*Field of Study: Specialized Knowledge and Applications  
For CPE Accreditation, this course is a group-live offering.*

## Course Overview

Learn evaluation, measurement, and verification (EM&V) concepts relevant to portfolio and program design, including techniques to quantify energy savings and evaluate program effectiveness. Identify the right size for an evaluation plan that fits your utility's needs, based on goals, reporting requirements, budget, and staff availability. Learn about available tools and how to communicate program results to different stakeholders.

## Course Topics

- Data system requirements to track and analyze program results
- EM&V approaches to evaluate program results, including process evaluation, impact evaluation, and savings verification
- Tools and techniques to compare and benchmark energy savings, participation, cost-effectiveness, and yields
- Latest trends in real-time EM&V and measuring savings at the meter
- Best practices for reporting and communicating program results to stakeholders

## Course Level

**Basic.** This course does not have prerequisites and does not require advance preparation.

## Instructor

Pierre van der Merwe, Director, Vermont Energy Investment Corporation



# Instructors

## **Rebecca Foster, Director, Consulting Division, Vermont Energy Investment Corporation (VEIC)**

Rebecca designs and reviews energy efficiency programs for clients. She led the residential program design for the New Jersey Clean Energy Program. She has worked with municipal and investor-owned utilities to develop effective energy efficiency programs.

## **Cheryl Jenkins, Associate Director, Consulting Division, VEIC**

Cheryl has over 11 years of research and analysis experience in electric and gas utility energy efficiency programs. She led the development of technical reference manuals in Ohio, Iowa, and Illinois and the Department of Energy's program benchmarking guidebooks and Community Energy Strategic Planning Academy. She has piloted residential and industrial efficiency programs.

## **Emily Levin, Manager, Program Strategies, VEIC**

Emily designs and advises on energy efficiency programs nationally and is an expert in next-generation program models. She was responsible for the statewide residential strategy for Efficiency Vermont, where she developed and implemented home energy labeling and managed the Home Performance with ENERGY STAR program.

## **Pierre van der Merwe, Director, Data and Technical Services Division, VEIC**

Pierre leads activities in evaluation, reporting and analytics, and business solutions. He is responsible for the integrity of statewide and regional technical reference manuals and the development of residential, commercial, and industrial energy analysis tools. He oversees custom data analytics for large energy users.

## **John Miner, P.E., President, Collaborative Learning, Inc.**

John is a consultant with more than 45 years of experience in the electric utility industry. He has been an APPA instructor for more than three decades and an instructor for the University of Wisconsin for 20 years. He has worked for the Austin Electric Utility Department in Texas and Rochester Public Utilities in Minnesota.

**For detailed course and instructor information, visit [www.APPAAcademy.org](http://www.APPAAcademy.org) and click on Certificate Programs.**

# Certificate Completion Requirements

## Pass an online exam

- The online exam, made up of 100 multiple choice questions, will assess the participant's comprehension of the five required courses.
- Participants can take the exam at their convenience, after finishing the coursework requirement.
- An individual must score at least 75 out of 100 (75%) to pass the exam. Participants have two opportunities to pass the test, thereafter there will be a \$50 fee assessed to retake the exam.

## Submit an energy efficiency program business plan

- The plan will be a model for any energy efficiency program the utility undertakes. It will include all of the topics, actions, and issues that a project manager must address while managing an energy efficiency project.
- Participants will receive plan guidelines that outline what is expected in each section.

## Timing

Participants must complete the program requirements within one year of attending their first course in the certificate program curriculum.

## Questions?

Please contact APPA's Education Department at 202/467-2919 or [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org).

# Enrollment Fees

## APPA Members

Registration received on or before April 17	\$2,400
Registration received after April 17	\$2,650

## Nonmembers

Registration received on or before April 17	\$4,800
Registration received after April 17	\$5,050

The enrollment fee includes the five courses, cost of study material, exam grading and post-course project review/grading.

## Registration Information

To register, visit [www.APPAAcademy.org](http://www.APPAAcademy.org) and click on “Certificate Programs.”

# Accreditation



## Continuing Education Units

The American Public Power Association is accredited by the International Association for Continuing Education and Training (IACET). APPA complies with the ANSI/IACET Standard, which is recognized internationally as a standard of excellence in instructional practices. As a result of this accreditation, APPA is authorized to issue the IACET CEU. For more information on APPA's certification status, attendance requirements and obtaining attendance transcripts, visit [www.APPAAcademy.org](http://www.APPAAcademy.org) under “Accreditation” or contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org).

## Professional Development Hours

APPA educational practices are consistent with the criteria for awarding Professional Development Hours (PDHs) as established by the National Council of Examiners for Engineering and Surveying (NCEES). Course eligibility and number of PDHs may vary by state.



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