



## Certified Demand Side Manager™ Training Program

### About This Program

AEE's Certified Demand Side Manager (CDSM™) training program is designed to provide attendees an encompassing course that teaches how to apply and implement industry best practices for designing, justifying, developing, implementing, and managing Demand Side Management (DSM), Demand Response (DR), and Load Management (LM) programs. The course was updated in 2022 to specifically include a global view of how professionals deal with DSM programs around the world, while at the same time providing the necessary fine detail knowledge that professionals need to effectively facilitate DSM programs from the beginning conception of the program through the program's final retirement.

### What You Will Learn

- Learn how DSM, DR and LM programs are viewed by different constituents
- Learn what industry professionals need to know to effectively deal with situations when developing, implementing, and facilitating DSM, DR and LM programs
- Learn how DSM, DR and LM programs are valued with significant time focusing on the performance and understanding of how to perform cost-effectiveness
- Learn how to make better decisions regarding DSM programs throughout the life of the specific program, including discussions of how the design of a program can avoid potential pitfalls in the DSM programs operation
- Learn how DSM programs go through cost recovery, including understanding how rate structures can impact these programs
- Learn how to more effectively communicate, in non-technical terms, the benefits of DSM programs or the specific energy efficiency measures or projects within the program
- Learn the course topics in an interactive lecture format and various practical sessions (walkthroughs as the entire class, done in small groups, or do it by yourself) facilitated by the instructor

### At-a-Glance

- » This training program prepares attendees to take the Certified Demand Side Manager (CDSM™) exam.
- » This training program is held over 3 days.
- » You earn 2.4 CEU | 24 PDH | 4.8 AEE Credits for completing this program.

### Key Takeaways

- » Work through practical examples to demonstrate the topics and procedures covered.
- » Review the various areas of the Body of Knowledge associated with AEE's CDSM™ certification exam.
- » Discuss how to apply what you have learned to your business and applications to improve profitability.
- » Leave with knowledge that can be readily implemented and a course workbook and other tools that are invaluable to the field.

### Registration

Candidates should visit the website for additional information on available training courses, certification application process, exam registration, and associated fees. Visit [www.aeecenter.org/training](http://www.aeecenter.org/training)

# CDSM™

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## Who Should Attend

This course provides the best value to energy and sustainability professionals engaged in the development, implementation, management, or administration of DSM, DR, and LM programs. The program is also very beneficial to those that oversee these functions or to those seeking career growth in the future into this area.

## Course Outline

- Introduction to the CDSM™ Program
- History of DSM
- Planning and Evaluating DSM Program
- Designing DSM Programs
- Implementing DSM Programs
- Managing DSM Programs
- Verification and Analysis of DSM Programs
- Future DSM Programs
- Case Study

## Our Instructors

This multi-day program is taught by approved instructors with extensive experience with DSM programs in the industry. They present the latest practices, strategies, and theories, while leading discussions in an open, interactive environment. Through the design of the course, attendees will also spend invaluable time connecting with and learning from other program attendees.

## Certification Eligibility

The prerequisites to qualify for the certification process take into account the diverse education and experience applicants may have. Each candidate must meet the required criteria at

[aeecenter.org/cdsm](https://aeecenter.org/cdsm)

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## Training Program

### Detailed Agenda

#### History of DSM

- Definition, purpose, and benefits of DSM
- Legislation points that influenced DSM, DR, and LM
- Drivers of DSM, DR, and LM programs
- Difference between energy, power, and demand
- How different DSM program types impact utility load shapes

#### Planning and Evaluating DSM Programs

- Understanding the financials of DSM, DR, and LM
- Understanding discount rates
- Cost effectiveness tests RIM, TRC, UCT, SCT, PCT
- Pro's/Con's, perspectives, and cautions of each test
- Walk through of calculations of cost effectiveness tests
- Precautions of data
- Data input and needs for evaluation
- Considerations prior to Design (Misc. and Rates)

#### Designing DSM Programs

- Considerations prior to design
- Deciding on what programs to develop and initiate
- Overall design process
- Information needed for design
- Free rider evaluation methods
- Standards development and pitfalls to avoid

#### Implementing DSM Programs

- Implementation guidance and process
- Process and framework development
- Required supporting documents

#### Managing DSM Programs

- Maturity roadmap
- Effective engagement and oversight
- Reasons why some DSM programs are successful and some are not
- Overcoming and preventing future program pitfalls
- Effectively handling issues that arise

#### Verification and Analysis of DSM Programs

- Effective program metrics and trending
- Measurement and verification (M&V) purpose and types
- Planning and when to perform M&V
- M&V advice and cautions

#### Future DSM Programs

- Understand how DSM programs are being influenced in industry today
- Difference in utility revenue and how that influences DSM programs
- Impacts of renewables and electric vehicles
- Taking advantage of these DSM changers for future DSM programs

#### Case Study | Working Session

- 4-hour case study to take an initial DSM program from inception through implementation and through at least one future adjustment recommendation