



Steps to Becoming a Volunteer Coach

Revised 4/5/2021

Complete all steps below to become a HeatSmart Alliance coach:

1. **Become an Individual Member or Associate of the Alliance.** See more information and instructions at <https://heatsmartalliance.org/engage-with-us-for-individuals/>.
2. **Read the following general information about various types of heat pumps:**
 - Information published by the Massachusetts Clean Energy Center (MassCEC) on its [Clean Energy Lives Here](#) website, in particular the following documents
 - [Guide to Air Source Heat Pumps](#) (ASHP)
 - [Guide to Ground Source Heat Pumps](#) (GSHP)
 - [Guide to Heat Pump Water Heaters](#) (HPWH)
 - [Air Source Heat Pump Buying Guide](#) published by NEEP.org
3. **Learn about locale-specific incentive programs**, including rebates, incentives and tax credits available to members of your community:

For coaches residing in communities served by Investor Owned Utilities (IOUs) including Eversource and National Grid:

- [Mass Save Electric Heating and Cooling Equipment](#)
- [Mass Save Electric Heat Pump Water Heaters](#)
- Mass Save also provides rebates for [oil](#), [propane](#), and [gas](#) heating systems since central heat pumps are often installed in conjunction with replacing an existing fossil-fuel heating system.
- [MassCEC Whole Home ASHP Pilot Program](#), running through June 25, 2021.

For coaches residing in a community served by a municipal light plant (MLP), visit your MLP's web site to learn about incentive programs they may offer.

For residents of all Massachusetts communities:

- Federal Tax Credits: Various credits are available for home energy efficiency improvements; see [EnergyStar overview of federal tax credits](#)
4. **Read the HeatSmart Alliance Coaching Model.** Download the complete model from <https://heatsmartalliance.org/coaching-model/> and review all four components.



5. **Review Client-Facing Materials** that coaches send to prospective clients and ask them to complete at the start of an engagement:
 - [Homeowner Questionnaire](#)
 - [Liability Waiver](#)
6. **Complete the Knowledge and Skills Self-Assessment** via our [on-line self-assessment form](#).
7. **Write a personal Coaching Statement.** You will share this statement with prospective clients. Example coach's statements are available on the HeatSmart Alliance Google Drive -- search on "Example Coaching Statements".
Note: you must be a Member or Associate to access our shared Google Drive.
8. **Submit your New Coach Application** via our [on-line application form](#).

That's it! Our Coaching Panel will review the information you submit and assign a mentor within two weeks. You will receive a notification that you can represent yourself as a HeatSmart Alliance Volunteer Coach and contact info for your mentor. Your mentor can help you start promoting your services and will be available for consultations as you begin helping clients.