



Steps to Becoming a Volunteer Coach

Revised 10/24/2024

Complete the steps below to become a HeatSmart Alliance coach:

1. **Become a Member of the Alliance.** See more information and instructions at <https://heatsmartalliance.org/volunteers/join-alliance/>.
2. **Attend a coaching course.** Either our [Heat Pump Coaching Basics course](#) or [Rewiring America's Electric Coach course](#) are acceptable. Our course is offered once or twice a year but you will be granted access for self study within days after you register. The Rewiring America course is offered more frequently.
3. **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 pages
 - [Air Source Heat Pumps](#) (ASHP)
 - [Ground Source Heat Pumps](#) (GSHP)
 - [Heat Pump Water Heaters](#) (HPWH)
 - [Air Source Heat Pump Buying Guide](#) published by NEEP.org
4. **Learn about incentive programs**, including rebates and tax credits available to members of your community:

For coaches residing in a community served by an Investor Owned Utilities (IOUs) including Eversource and National Grid, see [Mass Save Residential Rebates and Incentives](#)

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.

All coaches should learn about federal tax credits provided by the Inflation Reduction Act of 2022. See the [EnergyStar overview of federal tax credits](#).
5. **Review the HeatSmart Alliance Coaching Model.** Download the complete model from <https://heatsmartalliance.org/volunteers/coaching-model/>.
6. **Download and review standard documents** that a coach should send to a prospective client at the start of an engagement:
 - [Homeowner Questionnaire](#)
 - [Liability Waiver](#)
 - [Coach and Client Roles and Responsibilities Template](#)



7. **Customize the Coach and Client Roles Template.** Fill in the blanks highlighted in yellow. Specifically, insert the name of the community you serve (town, city or region) and your name. Remove the yellow highlighting and save as a PDF without *Template* in the filename. You should send this PDF document to new clients at the start of each engagement.
8. **Complete the Knowledge and Skills Self-Assessment** via our [on-line self-assessment form](#).
9. **Submit your New Coach Application** via our [on-line application form](#).

That's it! Our Coaching Working Group lead or another designated volunteer will review the information you submit within two weeks. You will receive an email notification that you have been onboarded as an Alliance coach. We recommend that all new coaches receive mentoring from a more experienced coach for their first one or two engagements. Contact coaching-lead@heatsmartalliance.org if you would like to be assigned a mentor.