



# Steps to Becoming a Volunteer Coach

Revised 3/4/2026

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. **Complete a heat-pump or energy coach training course.** Either our [Heat Pump Coaching Basics course](#) or [Rewiring America's Electric Coach course](#) is acceptable. Our course is offered once or twice a year. The Rewiring America course is offered more frequently. While it is preferable to attend a live offering of our course which includes participatory breakout sessions, it is acceptable to complete it by self study. **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
3. **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.
4. **Read the HeatSmart Alliance Coaching Handbook.** It is available online via [our Coaching Resources page](#) as a collection of Google Docs.
5. **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](#)
6. **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.

7. **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.

If you have any questions about this process, email [coaching-lead@heatsmartalliance.org](mailto:coaching-lead@heatsmartalliance.org).