

**Installer Update–2023 #2**  
**2023-04-27**

We highlight below the key activities of the HeatSmart Alliance since our January 2023 update.

***Progress by the Numbers***

<b>Description</b>	<b>2023 Start</b>	<b>Current Status</b>	<b>2023 Goal</b>
Grow No. of Members/Associates	71	89	100
Grow No. of Communities Represented	31	39	40
Support Educational Events	–	10	24 - 30
Accept New Coaching Assignments	–	48	500
Train/Mentor New Coaches	–	14 (underway)	25

**Coaching:** We're seeing rapid growth in coaching activities both within the Alliance and within specific Massachusetts communities. We estimate that Massachusetts currently has over 50 active heat-pump coaches. At least 15 Massachusetts communities either have, or will soon launch, coaching programs.

On March 26, the Alliance led an event on community-based energy coaching, hosted by the Building Electrification Accelerator (BEA). This event generated significant follow-up from communities seeking assistance with developing local coaching programs.

On March 29, Canary Media published an article based on an interview with the lead of our Coaching Working Group, Steve Breit, entitled [\*'Heat-pump coaches' help neighbors ditch fossil heat in Massachusetts\*](#). This article generated even further interest in community-based coaching from community organizations both within and outside Massachusetts, along with a deluge of requests for coaching from individual homeowners.

We launched our first 2023 Coaching Basics training course (5 sessions, April 25 to June 12), with 14 trainees from 13 different municipalities. We hope to offer a second training course later in the year.

We've recognized for some time that, to scale volunteer coaching for greater impact, communities need more support than we, as a volunteer organization, can provide. In our January Installer Update, we introduced our draft [\*Vision for Scaling Residential Energy Coaching\*](#), which continues to resonate not only with community groups across the state, but also with agencies having the resources to implement a program to support community-based coaching. We remain optimistic that Massachusetts will launch such a program, and we continue to refine the vision document and to share it with interested parties.

**Heat-Load Analysis Tool:** This spreadsheet tool allows our coaches to benchmark the thermal integrity of a home against other Massachusetts homes and to approximate a home's overall design heating load based on historical fuel consumption. While not a substitute for an ACCA Manual J load calculation, it can provide a valuable independent check. In February, we [published our Heat-Load Analysis tool](#) with the goal of attracting interest from an organization having the resources to adapt it and maintain it for broader use. We welcome your feedback.

**What we look for in a Quote:** We are a volunteer organization, not professionals, and we are not qualified to advise you on how to conduct your business. That said, we'd like to share what we like to see in a quote, but that is often missing:

- *Description:* Clear description of the installer's offering
- *Model Numbers:* Complete model numbers for indoor units, outdoor units, thermostats, and furnaces (if included)
- *AHRI Reference Numbers:* Facilitates a) confirmation of eligibility for Mass Save® (or local municipal light plant) rebates, and b) look-up in the NEEP ccASHP List for additional performance mapping
- *Pairing of Indoor and Outdoor Units:* For systems including multiple indoor and outdoor units, indicates which indoor units mate with which outdoor units
- *Mounting of Outdoor Units:* Indicates where each outdoor unit will be placed, including the pedestal height(s)
- *Mounting of Indoor Units:* Indicates where each indoor unit will be placed
- *Basis for System Sizing:* Indicates how the design heating load was estimated, and whether this estimate will be refined prior to installation
- *Refrigerant Line Sets:* Indicates whether existing refrigerant line sets will be reused or replaced. If reused, explains the cleaning process to be used and whether the existing line sizes fall within manufacturer's recommendations.
- *Permits:* Indicates whether the installer will secure all required permits, or whether this will be the customer's responsibility
- *Additional Work:* Indicates what additional work, if any, may be needed, but is not included in the quote (such as electrical work)
- *Warranty:* States manufacturer's warranty and installer's labor warranty, if any
- *Incentives:* Includes estimated Mass Save (or local municipal light plant) rebates, with any applicable caveats. Also indicates whether the installer will apply for all applicable rebates on behalf of the customer. Further, it's helpful to indicate whether equipment may meet requirements for federal tax credits.
- *Terms and Conditions:* Provides all contractual terms and conditions.

We understand that quotes are business-sensitive, and we never share them with others.

**Question to Installers:** In each update, we pose a question to you. We hope you'll take a moment to respond. Our question is: ***Please share your thoughts on what we look for in a quote (see bullet list above). What may be unnecessary (and why)? What have we missed that some installers don't routinely include?***

If you have any other questions, comments, or suggestions, please do not hesitate to contact us.

Best regards,  
Bob Zogg  
Facilitator, HeatSmart Alliance  
[Facilitator@HeatSmartAlliance.org](mailto:Facilitator@HeatSmartAlliance.org)

**About us:** The [HeatSmart Alliance](#) is a volunteer group that grew out of the HeatSmart Mass program sponsored by the Massachusetts Clean Energy Center and the Massachusetts Department of Energy Resources. Our mission is to accelerate the adoption of energy-efficient heat pumps in Massachusetts homes and buildings. We focus on air- and ground-source heat pumps, heat-pump water heaters, and weatherization as vital components of the overall strategy for reducing greenhouse gas emissions. We accomplish our mission by:

- Educating and coaching homeowners, landlords, and business owners
- Simplifying installer evaluation and selection
- Collaborating and sharing information with community groups and other like-minded organizations.