

Installer Update–2026 #3

2026-07-19

Please find below discussions of:

- Mass Save® quote comparisons
- Our take on Manual J's
- Questions to you about Manual J reports (please reply)
- The HeatSmart Alliance's year-to-date progress
- A July 29 job fair at the Greater Lawrence Technical School.

Mass Save Quote Comparisons: HeatSmart Alliance coaches have exclusive access to Mass Save® no cost virtual Heat Pump Quote Comparison Prep consultations, which will prepare clients to utilize the Quote Comparison Tool (QCT). The QCT is a valuable resource that evaluates up to five heat-pump quotes and generates a clear, "apples to apples" comparison report with key insights into quote sizing, design, and economic impact.

After completing a required Heat Pump Quote Comparison Prep consultation, clients will be sent a link to upload their heat pump quotes and other necessary documentation, including invoices and, when available, Manual J load calculations and historical home fuel-use history. Coaches are encouraged to support their clients by joining the consultation if possible, in scheduling a Heat Pump Quote Comparison Prep consultation and filling out the QCT information, as well as help clients understand the Quote Comparison Report.

The Alliance is working to outline the exact steps coaches can take to support their clients through the Quote Comparison Tool process. Our clients have found these consultations and quote comparisons very useful. From our perspective, the Mass Save QCTs save our coaches a significant amount of work and can provide insights that we cannot because they're based on detailed performance simulations that we don't have the tools to conduct.

Manual J on Tablets Changes the Game: As an installer, you are well aware that properly sizing heat pumps is crucial to maintaining comfort and efficiency, and that proper sizing requires an accurate estimate of the heating design load. The standard method for sizing residential HVAC systems is to perform a Manual J analysis followed by Manual S analysis using ACCA-approved software. But there are several ways to do a Manual J that require varying levels of input detail. A simple "block load" analysis can be done quickly based on a satellite image of the home while a more detailed room-by-room analysis requires measurements of each room. Doing a careful, room-by-room analysis used to be quite time consuming, but a recent innovation has dramatically reduced this time to perhaps 15 minutes for a typical home. Here, we'll discuss some recent observations on how this innovation impacts an installer's use of Manual J and advocate that installers provide a full Manual J report to any prospective customer who requests one.

The Manual J innovation relies on the LiDAR scanners that are now built into some tablet devices, such as Apple iPad Pro models. Tablet apps by [ConduitTech](#), [AmPLY](#) and [CoolCalc](#) make use of the LiDAR scanner and enable a user to scan the interior of a typical home in about 15 minutes. This makes it possible to complete a Manual J analysis while visiting a home instead of returning to the office and facing the time-consuming task of manually entering measurements into Manual J software.

Recently, one of our volunteer coaches assisted a homeowner in Medfield, MA. The homeowner invited 5 HVAC installers to visit their home and provide quotes, and also asked each company to provide their Manual J analysis. All are members of the [Mass Save Heat Pump Leaders Network \(HPLN\)](#). Three of the 5 installers used a tablet to perform a Manual J during their home visit. Only one installer provided a Manual J report on request, though it appeared to be a block-load analysis based on a satellite image. The other installers provided the homeowner, when asked, with the design heating load.

Even with the more detailed measurements provided by the LiDAR scanner, the design heating loads provided by the 3 installers who used tablet apps varied by 30%. The 2 installers who did not use tablet apps provided design heating loads that were over 50% higher than the lowest scanner-based estimate. Based on our experience, we don't think this example is an anomaly. For some homes, the ranges may be even larger.

What accounts for this large variation in heating design load estimates? While some of the variation may be due to different assumptions about the heating design temperature, it's likely that most of the differences are due to different assumptions about the non-geometric inputs to Manual J, such as infiltration, R-values of walls and ceilings, and U-values of windows. Installers who use tablets to do Manual J still need to be careful to review the other inputs for each home.

Given this large variation in Manual J results, we think the best policy for all concerned is transparency. That is, we advocate sharing the full Manual J report when a prospective customer requests it.

Why provide a full Manual J report on request?

- Demonstrating the care you take in estimating design loads will make your prospective customer more comfortable that you're proposing equipment that is well matched to their home's needs.
- If your prospective customer seeks a Mass Save quote comparison (discussed above), your Manual J results will be factored into the comparison.
- If you don't provide this information, it makes it harder for the Mass Save consultant (or a volunteer coach) to evaluate your quote, potentially leaving some uncertainty in your prospective customer's mind.

Question to Installers—Please Reply: Having read our discussion above, which advocates providing full Manual J reports with quotes, are you willing to provide these reports upon customer request? If not, would you at least be willing to provide the estimated design heating

and cooling loads (including design temperatures) that you used to size the equipment you are proposing? Please explain your replies.

Progress Towards 2026 Goals: The table below summarizes the HeatSmart Alliance's progress towards some of our 2026 goals. While we continue to gain new Members, total membership remains flat due to attrition. As in 2025, we are also presenting and tabling at fewer events compared to 2023 and 2024. On the positive side, we've trained about twice as many new coaches in the first half of 2026 compared to all of 2025, with a third coach training session planned in late 2026. These results are at least in part due to a strategic shift in emphasis from direct coaching to supporting MA communities in developing their own coaching programs. In 2026, this includes support for coaching programs in the Pioneer Valley and the City of Watertown. Further, we continue to promote our [Coaching Handbook](#) (first released in 2025, with Version 2.0 released in January 2026), which is receiving widespread accolades.

Progress by the Numbers—Mid-2026

Description	2026 Start	Mid-2026 Actual	2026 Goal
Grow No. of Members	152	148 ^a	200
Grow No. of Communities Represented	58	53 ^a	79
Present/Table at Events	-	8	35
Help Develop Community Coaching Programs	-	2 in Progress ^b	3 - 4
Train/Mentor New Coaches ^c	-	52	90

a) *In early 2026, we purged inactive Members, resulting in little net change in membership despite continuing new Member sign-ups*

b) *Includes the Pioneer Valley Planning Commission and the City of Watertown*

c) *Includes coaches for community-based coaching programs—not just Alliance coaches.*

Job Fair (Announcement from the GLTS): Join us at Greater Lawrence Technical School on **Wednesday, July 29, from 2:00–4:00 PM** to meet skilled, job-ready graduates from our **HVAC, Plumbing, and Electrical** programs. Whether you're hiring now or planning for future growth, this is a great opportunity to connect with trained candidates ready to contribute to your team. Eligible employers may also qualify for up to \$9,600 in wage reimbursement when hiring through the GLTS Clean Energy Wage Reimbursement Program. RSVP to Mac Clark at mclark@glts.net or 978-686-0194 ext. 2045.

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

Best regards,
Bob Zogg

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About us: The [HeatSmart Alliance](#) is a volunteer organization whose mission is to accelerate the adoption of energy-efficient heat pumps in Massachusetts. We focus on air- and ground-source heat pumps, heat-pump water heaters, and weatherization. Our key organizational objectives are:

- Educate residents about heat pumps through community presentations, our website, and other channels
- Provide one-on-one coaching to residents who are interested in evaluating heat pumps for their homes
- Facilitate the growth of community-based heat-pump coaching programs
- Inform local, state, and federal government policies.

The Alliance does not accept donations or referral fees from manufacturers or installers.