Launching Community Energy Coaching Programs:
An Implementation Toolkit and Guide

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Contents

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About NEEP

NEEP was founded in 1996 as a non-profit whose mission is to serve the Northeast and Mid-Atlantic to accelerate regional collaboration to promote advanced energy efficiency and related solutions in homes, buildings, industry, and communities. Our vision is that the region's homes, buildings, and communities are transformed into efficient, affordable, low-carbon, resilient places to live, work, and play.

Disclaimer: NEEP verified the data used for this brief to the best of our ability. This paper reflects the opinion and judgments of the NEEP staff and does not necessarily reflect those of NEEP Board members, NEEP Sponsors, or project participants and funders.

INTRODUCTION

What Is Energy Coaching?

Energy coaching is a community-driven educational program that leverages peer-to-peer support and local project examples to help homeowners navigate the complexity of home performance improvements. A coaching program consolidates existing knowledge and resources into an informational website and offers one-on-one consultations with trained coaches.

How the Program Works

Community outreach in the form of marketing, educational events, and an informational website attracts residents to learn more about energy efficiency and home energy improvements. Residents who express interest in a one-on-on consultation get assigned to an energy coach from their community who listens to their needs and explains different options and next steps. Coaches may discuss many topics, including energy efficiency, modern heating and cooling equipment, installation processes, and available incentives tailored to the resident's home. Successful engagement results in home improvements that can lower energy bills and carbon footprint.

Who Are the Coaches?

Energy coaches are local community members, typically volunteers, who provide homeowners in their communities with unbiased advice, educational resources, and technical assistance, often free of charge. In some instances, coaches may be paid positions. Coaches have a passion for helping their community and are great communicators. They can come from all different backgrounds. Training courses give coaches the knowledge they need to speak on technical subjects like heat pumps.

Benefits for Communities

This work supports regional, state, and municipal decarbonization goals by increasing the adoption of highly efficient technologies, including heat pumps, within the residential and small commercial sectors.

Toolkit Overview

The following guide was created for local entities to support the creation of community-based energy coaching programs. The guide strongly encourages municipal participation in the energy coaching program; however, this is not always feasible and much of the content can be tailored to different administrative structures. The information in this guide was informed by interviews with established programs in Massachusetts and Maine.

There are three chapters to this guide:

Chapter 1: Program Description & Administrative Guidance

- This chapter defines a coaching program and identifies common roles, tasks, and processes you should be aware of. This section also describes methods for finding, training, and hiring coaches.

Chapter 2: Communication & Outreach Strategies

- This chapter recommends a seven-step process to create an outreach strategy. It includes many examples and ideas.

Chapter 3: Model Website Language

- This chapter provides model language that can be used to create a website or webpage for your program including technology descriptions and FAQs.

CHAPTER 1: PROGRAM DESCRIPTION & ADMINISTRATIVE GUIDANCE

Defining a Community Heating Electrification Coaching Program

A community energy coaching program is a municipally supported, community-led education program that helps residents improve the efficiency of their homes and transition their appliances to more efficient alternatives. These programs are often a collaboration between municipalities and passionate local volunteers. These programs offer a trusted educational website and free, one-on-one consultations with knowledgeable energy coaches. A coach is a trained community member who has knowledge of a particular topic, which they offer to their neighbors through free consultations. An energy coach understands the basics of efficient heating and cooling technologies, building weatherization, system design, and the installation process.

Coaches and other program staff are often volunteers but can also be paid positions when funding allows. Coaching is what makes the program so successful, particularly when there is municipal buy-in. Residents appreciate having unbiased, third-party support to walk them through the complex, multi-step electrification process and teach them about the energy and non-energy benefits of the upgrades. Coaches can convey the real, authentic experience of someone in the community, making heat pump adoption seem more like the local norm than the outlier.

This guide focuses on heating electrification, but the components and approach of energy coaching are applicable to other solutions. Programs can include a range of efficient technologies like weatherization, heat pumps, heat pump water heaters, electric vehicles, solar PV, induction stoves, or even sustainability initiatives like sustainable landscape design. It is up to you and your volunteers to decide how much ground you want to cover.

Components of a Successful Program

We have identified three key components to a successful program:

- **Municipal Buy-In** – While there are examples of entirely volunteer-driven community heating electrification programs, the most successful initiatives have municipal buy-in. Ideally, this means that a municipal employee is heavily engaged in the organization and promotion of coaching services, and the municipal name and seal can be used on promotional materials. This does not mean that all the services need to be performed by municipal staff. Collaboration with volunteers and local sustainability groups will

strengthen the program. Municipal buy-in can offer longevity and stability to the program. A paid staff member will generally be more reliable and remain a part of the program for longer. Municipal affiliation gives your program credibility, allowing coaches to quickly build trust with homeowners.

- **Educational Website** – The website is the hub for your program. Residents should be able to learn about the technologies your coaches are supporting, the benefits of these technologies, available financial incentives, and the coaching process.
- **Coaching Service** – Community coaches offer one-on-one consultations with residents. Coaches will do their best to identify the needs and priorities of the residents and guide them through the process of achieving those goals. Coaches offer unbiased advice in a low-pressure environment.
- **Program Evaluation** – Your program should strive for continuous improvement. Program evaluation is crucial for understanding the impact of your program. Make sure to track metrics such as attendance at events, number of coaching engagements, number of installations, and testimonials. Analyzing the process and outcomes can lead to ongoing improvements and verify the effectiveness of the program.

Key Roles

The roles listed below are necessary to launch a successful coaching program. Each role can be filled either with paid staff (full- or part-time) or volunteers, and the same person can fill multiple roles.

- **Program Manager** – This person is responsible for the organization of the program, acts as a liaison with the town, holds regular team meetings, tracks progress, directs volunteers, supports events, collaborates with other sustainability groups, and performs other project management duties.
- **Coach** – The coach meets with residents for one-on-one consultations. Coaches listen to resident priorities and give feedback on how to best achieve them. A coach brings their lived experience and community trust to support of the residents. Coaches must first be trained to learn about heat pumps and/or other technologies and coaching best practices. Coaches can come from all backgrounds and do not need prior knowledge of the technology. For more information about hiring and training coaches see the section below.
- **Outreach Coordinator** – The outreach coordinator organizes events and outreach activities. Activities may include posting on social media, promoting the program to media, tabling at events, holding open houses and public education sessions, designing yard signs, and sending out mailers.
- **Coach Coordinator** – The coach coordinator pairs residents with a coach in a timely manner. They must be aware of the team's capacity and balance the workload of coaches to ensure that they serve residents in a timely manner without burning out. They must also track the residents' journey and make sure coaches follow up with customers when appropriate. A coach coordinator may find it useful to use a customer relationship manager (CRM) to help track resident engagement and coaching consultation.
- **Information Technology (IT) Coordinator** – The IT coordinator supports the team behind the scenes with tasks like website creation, form creation, and database management, depending on the tools being used.
- **Residents** – While not a part of the program team, residents are a key component of the program. The program will need to communicate effectively in ways that resonate with the local community to generate interest and consultations.

Administrative Tasks Associated With Coaching

Resident Intake

Role: Automated, Coach Coordinator, IT Coordinator

The resident intake process is the beginning of a resident's coaching experience. How will residents reach out to you? How will they share their priorities and needs? We recommend using an online survey provider like Google Forms, Microsoft Forms, Survey Monkey, or Calendly to receive coaching requests instead of relying on a manual system where the residents express interest over email. The survey services listed above typically compile information into a spreadsheet for easy viewing, allowing you to keep requests in one place and reduce the number of personnel hours spent on intake. It is always good practice to include an email for further information or for people who feel more comfortable with email than an online survey. The person fulfilling the IT coordinator role should support the creation of the automated intake process. The coach coordinator should monitor form responses and email communications and ensure that the information is successfully tracked in a CRM database or spreadsheet.

The amount of information you want to collect during intake is up to you. At a minimum we recommend collecting the resident's name, email address, phone number, home address, and a description of their needs.

You may also want to collect more specific information about the building that will be useful for the coach to know. Some examples include:

- Resident priorities (comfort, cost savings, carbon reduction, etc.)
- Reason for requesting a consultation
- Age of the building
- Square footage
- Current heating fuel and distribution type
- Current domestic hot water system
- Current cooling system
- Age of equipment
- Level of insulation
- The last time an energy audit was performed

The HeatSmart Alliance has a Homeowner Questionnaire that you can use or tailor for this step.

Coach Dispatch and Engagement Tracking

Role: Coach Coordinator, Coach

Once a resident submits a coaching request, they will need to be assigned to a coach. Responding to coaching requests, matching residents with coaches, and monitoring the engagements are the main priorities of the person filling the coach coordinator role.

A coach coordinator should be aware of each coach's schedule and current workload so that no one coach gets overloaded or burned out. If coaches are too busy, it is the coach coordinator's job to correspond with the

resident to let them know that coaches are currently unavailable. An engagement tracking tool such as a customer relationship manager (CRM) or a spreadsheet should be used to track consultations and coach activity. The tracking tool will help the coach coordinator understand which coaches are available. When assigning a coach, it is best to first ask the coach if they are available and willing to accept the request. Coaches are often volunteers and do not have the same obligations or time to participate as a paid person would. Don't assume a coach's availability.

Once a coach has accepted a request and has been assigned, it is the coach's responsibility to reach out to the resident to introduce themself, provide any preliminary information, and schedule the consultation. The coach should update the engagement tracking tool to indicate that preliminary information was sent, a consultation was scheduled, and a consultation was completed. The coach coordinator can monitor this information to make sure that each engagement is progressing and to remind coaches if an engagement has come to a standstill.

Resident Follow-up

Role: Coach, Coach Coordinator

Coaching engagements do not end after the consultation. Every case is different and may require further consultations or email exchanges. We recommend a minimum of two or three follow-up emails after a consultation. These follow-ups may come from the coaching coordinator but are more impactful if they come from the coach themself. Your continued presence will enable them to act. Follow-ups also help program administrators understand impact and inform continuous improvement. You can decide the frequency of these follow-ups; here are some ideas:

- **Immediate Follow-up** – Within a week of the consultation, the coach sends a follow-up report containing a summary of topics covered, recommended actions, and an ask about any remaining questions.
- **Near-Term Follow-up** – Within four weeks of the first follow-up, the coach checks in to inquire if the resident has made any progress on next steps, and if they have any further questions. If progress has been made such signing an installation contract, the coach should update the engagement tracker.
- **Resident Satisfaction Survey** – It is important to get feedback about the coaching engagement from the resident so you can gauge the impact of your program and make improvements. You can create a post-consultation satisfaction survey to gather information. This feedback should be collected by someone other than the coach so the resident feels more comfortable giving an honest assessment.
- **Long-Term Follow-up** – Within three months of the previous follow-up, the coach checks in to inquire if the resident has made any progress on next steps and if they have any further questions. If progress has been made such as signing an installation contract, the coach should update the engagement tracker.

Team Organization

Role: Program Manager

The program manager is responsible for general program administration. They act as the liaison between the program and the municipality, lead the staff and volunteers, initiate communication plans, report on progress, modify the program, and perform other general program management tasks. Their specific tasks may include:

- Holding regular debrief meetings with the coaches to discuss tough cases and share knowledge. These meetings should be held regularly, such as monthly. These sessions are an important part of fostering a strong coaching team.
- Holding regular marketing and outreach planning meetings with coaches, volunteers, and local sustainability groups to organize events and ad campaigns. See Chapter 2: Communication & Outreach Strategies for more information.
- Identifying and obtaining funding to pay team members.
- Reporting on annual progress and connecting program outcomes to municipal climate goals.
- Determining whether changes need to be made to the program.
- Maintaining coach interest and morale.

Annotated Resident Journey

The following chart provides an example of a resident journey. Below each step in the journey, the chart identifies theoretical administrative **actions** and helpful **tools**. The HeatSmart Alliance's Heat Pump Coaching Handbook describes the coaching process in detail with many useful links.

ACTION	TOOLS
• Team holds events, makes announcements, does outreach.	• Communication & outreach strategy to help with marketing • Live website/webpage
Resident learns about the program through word of mouth, program outreach activities, etc.	
• Team has clear and informative website that provides a pathway for scheduling a consultation. • An intake process has been established to collect preliminary information and liability waivers.	• Website/webpage • Intake form • Liability waiver
Resident expresses interest in a consultation.	
• The coach coordinator monitors the schedules of the coaches and assigns a coach to the request. • If coaches are at capacity, the coach coordinator responds to the inquiry and explains no coaches are available. • The designated coach reaches out to the resident and provides a way to schedule the consultation.	• Engagement tracker (CRM/spreadsheet) to monitor coach workloads • Email templates for common responses such as "request received" and "no coaches available" • Scheduling assistant such as Calendly

ACTION	TOOLS
Resident is contacted by their assigned coach.	
• Coach speaks with resident about their goals and makes suggestions. They may discuss financing, equipment, and more. • After the consultation the coach updates the engagement tracker.	• Consultation template to help the coach focus the conversation, discuss all important topics, and create a consultation report
Resident has consultation with their coach.	
• After the consultation, the coach sends resident a summary of topics covered during the consultation and suggested next steps.	• Post-consultation report template
Resident receives follow-up notes and suggested next steps from coach.	
• Coach updates engagement tracker. • Coach coordinator monitors the engagement tracker for residents who are due for a follow-up and notifies the coach.	• Email template
2-4 weeks following the consultation, resident receives a follow-up email.	
• If the resident responds, answer unresolved questions, set up a second consultation, provide extra support. • Mark the engagement tracker with updates. Track if the resident followed through with improvements. • Coach coordinator tracks when a satisfaction survey should be sent.	• Email template • Satisfaction survey
One year later, resident completes a survey of their experience and actions taken.	
• Program manager tracks metrics for annual reporting and impact evaluation.	• Engagement tracker (CRM/spreadsheet)

Legal Considerations

In Massachusetts, there have been no instances of legal action being taken against a community heating electrification program, municipalities can consider and address three key legal and ethical concerns before launching a program. Disclaimer: This information is provided for informational purposes only. It is not intended as, and should not be relied upon, as legal advice or as a substitute for legal counsel.

Liability for Recommended Services

Municipal legal counsel may be fearful of instances where a customer is dissatisfied with the program and seeks to hold the municipality liable. Residents could claim that a coach operating under the municipal program recommended a course of action that the homeowner is dissatisfied with, and that the municipality should be held liable for a poor outcome.

To mitigate this concern, municipalities can:

- As part of the intake process, have a resident sign a liability waiver that acknowledges that the decisions made by the residents are their own and not those of the coach or the municipality. The HeatSmart Alliance has a template liability waiver that can be tailored to your program.
- Be careful with wording. Avoid words like "advice" or "recommendations" and instead emphasize that you are providing information for residents to think decisions through on their own.

Liability for Property Damage or Injury

For programs where coaches perform home visits, your municipality's legal team may be concerned that a coach could accidentally cause damage to the resident's property, resulting in the resident suing the municipality. They may also be concerned that a coach could injure themself in the building.

To mitigate this concern, municipalities can:

1. Provide only virtual coaching services and do not allow in-home visits. Doing so may reduce the comprehensiveness of the coaching experience; however, it reduces legal stress and time commitments.
2. Have a resident sign a liability waiver that acknowledges that the coach/municipality is not liable for any physical damage to the property as part of the intake process. This can be merged with the liability for recommended services waiver above.
3. Confer with your legal department to see what insurance protections municipal employees have and whether they also extend to volunteers. These insurance policies could potentially cover damage to property or injuries to the coach.

Municipal Ethics

Municipal ethics rules do not allow for a municipality or any person who could be viewed as a spokesperson of the municipality to "pick" winners and losers when it comes to commercial businesses. In terms of a heating electrification program, this means that recommending specific heat pump installers, weatherization contractors, or other service providers or equipment could violate municipal ethics.

To mitigate this concern, municipalities can:

1. Discourage or forbid coaches from recommending specific heat pump installers or other contractors. Residents are generally understanding when coaches explain ethical obligations, program rules, and related limitations.
   - Rely on third-party qualified contractor lists. For example, the state may have a qualified contractor list, such as the Massachusetts Heat Pump Installer Network (HPIN) list.
   - If allowed, initiate a procurement / request for proposal (RFP) process to select a dedicated installer(s).
   - If allowed, initiate a request for information (RFI) process to identify local contractors.

Hiring and Training Coaches

No coaching program would be complete without knowledgeable coaches. Identifying and onboarding coaches may seem like a daunting task, but you likely already have some good candidates in town. Candidates can be trained and do not need to be experts from the beginning. There are a handful of training programs and coaching networks that will bring coaches up to speed on technical concepts and coaching best practices.

Qualities of an Effective Coach

The best energy coaches are those that are passionate, dedicated learners with strong social and teaching skills. Engineers, contractors, and people who work in the energy field and other technical professions may have a head start on relevant concepts like building science, energy efficiency, and electrification. However, a strong technical background is not required to be an effective coach.

Communication skills end up being the most important for coaching success. Too much information will overwhelm, confuse, and dissuade residents. Too little information will reflect poorly on the program and the technology. The best coaches are those that can clearly explain technologies and design considerations, and answer questions to guide the residents toward their own conclusions. Coaches should understand where their knowledge/support ends and where the installer's responsibility begins. For example, coaches would not be expected to perform a Manual J calculation to determine the heat load of the home, but they could do a gut check on a system design for oversizing or point out design options that an installer did not.

Many potentially effective coaches are intimidated by the prospect of energy coaching because they feel their technical background is not adequate. However, conversations with established programs emphasize that prior technical knowledge is not the best indicator of an effective coach. In fact, many technically oriented coaches can over-explain concepts and try to solve problems or offer support that would best be left to an installer, again emphasizing the importance of communication skills alongside technical knowledge.

Finding Coaches

A good place to start is with local sustainability groups such as climate committees, energy committees, local sustainability advocacy groups, and others. These individuals are often aware of local energy challenges and the general concepts of residential energy efficiency. Local sustainability advocates have already shown a commitment to helping their communities and may be interested in expanding their impact.

Another place to start is identifying residents who have had a heat pump installation and have gone through the complexities of the process. When someone has had first hand experience with installing a heat pump, they may be more eager to guide others through the process. Posts in local social media groups such as Facebook and Nextdoor, or in local newspapers, can help programs connect with interested parties.

Number of Coaches

The number of coaches you need will vary by location. Larger municipalities or more sustainability-focused communities may need more coaches to meet demand. It is recommended that you begin with at least two coaches, as they will be able to go through training together and leverage each other for ongoing support and peer learning. As your program develops, it is important to track demand to determine if you need more coaches. Coaches are often volunteers, so it is important to manage their time to ensure they do not burn out. Multiple coaches and an effective coach coordinator will help programs mitigate coach burnout.

Training Coaches

Prospective coaches may come from a wide range of backgrounds. They will need to undergo training to understand important technical concepts and learn about tools and processes for coaching. The market for coach training is limited but growing. Below, we identify some training options.

Rewiring America

Rewiring America is a nationwide non-profit working to electrify homes, businesses, and communities, reduce emissions and energy costs, and improve health. To achieve this outcome, Rewiring America has developed materials in collaboration with Abode Energy Management to train community members from any background to become knowledgeable about building decarbonization and electrification. This free, four-week course includes two hours of full group in-person training for each week of the class. Additionally, an optional smaller one-hour regional office hour with veteran coaches is offered, as well as one hour of national office hours open to all participants led by the instructor. These office hours cover other residential electrification topics in more depth, respond to student questions, and allow time for participants to practice coaching. All sessions are recorded and made available on the course platform. Participants get access to course materials and the online participant forum for six months to one year. Since launching, over 1,500 participants have gone through the course. Typically, over 500 people apply to each cohort, with only 220-240 accepted to participate.

REWIRING AMERICA

- **Cost:** ***Free***
- **Dates:** ***Offered a few times annually, check website for details***
- **Length:** ***Two hours per week for four weeks***
- **Format:** ***Live (virtual) classes, asynchronous content is being developed***
- **Training Website (link)**

HeatSmart Alliance (Massachusetts Only)

HeatSmart Alliance is a volunteer-led non-profit that promotes clean heating and cooling solutions for Massachusetts homes. As part of this mission, HeatSmart has developed a training program for volunteers who want to help residents in their community switch to heat pumps. This training is offered at no cost and consists of four to five virtual classes held weekly. It is offered twice annually and often fills up. To meet demand for this training, the HeatSmart Alliance will provide online access to course materials for self-study upon request.

Below are key details about the program:

- **Cost:** ***Free***
- **Dates:** ***Two to three times a year. Check website for details***
- **Length:** ***1.5 hours per week for six weeks***
- **Format:** ***Live (virtual), asynchronous upon request***
- **Training Website (link)**

Chapter 1 Conclusion

Coaching programs offer residents a valuable opportunity to learn about home improvements from trusted community members in a low-pressure environment. They also support local goals to reduce carbon emissions. Leveraging a volunteer network makes energy coaching programs less resource intensive than other services. Identifying the right staff and volunteers will help you build a long lasting and impactful program. A program manager is responsible for the administration of the program, leading team meetings, and coordinating activities. The coach coordinator manages engagement and coach workloads while the coaches perform the consultations. Someone with IT skills can help set up software tools like the website, intake forms and scheduling forms, and engagement trackers. The next chapter will describe communication and outreach strategies to reach a wide audience and drive consultations.

CHAPTER 2: COMMUNICATION & OUTREACH STRATEGIES

Designing a Marketing Campaign

A community heating electrification program is a municipal education service to increase the adoption of efficient, clean heating and cooling technologies and improve the performance of homes within the community. Trained coaches, often volunteers, offer their expertise to residents via one-on-one consultations.

Effective communication requires intentional planning. This guide contains a Marketing Campaign Template and instructions for completing it. This template is intended to be used by the program manager and/or the designated outreach coordinator. The user will think critically about the best messaging to use, the target audience, and the best channels to reach them. Continued outreach will help your program convert awareness into action.

Annotated Marketing Campaign Template

The section following the guide is an annotated template that will help you solidify your purpose, audience, messaging, and outreach channels. A clean version of this template can be found here.

1. Purpose
2. Goals
3. Metrics for Tracking Success
4. Target Audiences
5. Messaging
6. Outreach Channels
7. Outreach Activities
8. Schedule

Step 1: Establish Purpose

The first step of designing your marketing campaign is to define its purpose or goal. This statement can be quite broad and can be as short as one or two sentences, as long as it encapsulates the campaign's general scope and mission. For example, your marketing campaign's purpose could be as simple as "increase visibility of a community-based energy coaching program."

Step 2: Set Goals

This step divides the overall purpose defined in Step 1 into more specific goals that you can track to measure the performance of the initiative. We recommend using the SMARTIE acronym to set goals:

- **Specific:** Each goal should focus on a specific aspect of the program. Try starting your goals with verbs like "increase" or "decrease" and including numerical targets.

- **Measurable:** Include numbers, percentages, deadlines, or other similar targets to improve the specificity of your goals and allow you to measure progress toward them. Measurable goals enable you to provide updates on progress in newsletters, on the program website, and in annual reports.
- **Achievable:** Being ambitious is great, but even the most aspirational goals should still be technically feasible and within the scope of the program. Being able to achieve about 80 percent of the goals you set is a good benchmark to help balance ambition with feasibility.
- **Realistic:** Even if a goal is technically feasible, it may not necessarily be realistic within the context of your program's funding, staff, and other duties. For example, if your program team consists of three staff members, setting five goals that would each require one full-time staff member or that would take away from other responsibilities is not realistic.
- **Time Bound:** Defining a time period for goals, such as a start and end date or a number of years can help your team stay organized. It can also create the foundation for your schedule (See Step 8) and inform a roadmap toward achieving your goals.
- **Inclusive:** Making sure that people of all different backgrounds can access coaching services or can become a coach will maximize the impact your program has on your community. Setting goals that incorporate inclusivity can ensure that you understand the issues people are facing and can serve a broad range of individuals.
- **Equitable:** Creating goals that address systemic injustice can ensure that your team works to help community members that need it the most. This is particularly important for a community-based energy coaching program, as residents with the highest energy burdens and/or lowest incomes will benefit the most from its services.

Examples of SMARTIE goals include:

- Engage 25 individuals in coaching initiatives in the first year of the program, including at least four residents who are income eligible.
- Enlist and train five volunteer coaches in the first two years of the program, including at least one coach who is fluent in Spanish and one who is fluent in Portuguese.
- Reach 300 individuals through educational events (webinars, meet the installer events, open houses, etc.) in the first three years of the program.

Step 3: Create a Metrics Tracking Method

After defining clear goals, you should regularly (e.g., quarterly or bi-annually) update metrics for tracking progress toward goals. Doing so can help prioritize work and allow you to assess the effectiveness of specific outreach activities. Regularly reporting metrics to stakeholders via newsletters and blog posts, on the program's website, during community events, or via other avenues is a great strategy for increasing program visibility and celebrating achievements.

Decide early in the process how you will track metrics. This will help you determine what baseline data you may need and who you should obtain it from, what information you should ask of program participants before and

after the installation of their heat pump, and what data you should track about installations (e.g., the load of the system, the efficiency rating of each system, the building's baseline energy usage).

Here are some example metrics:

- Number of attendees at events
- Number of people requesting coaching
- Number of people following through on a consultation
- Number of installations
- How people learned about the program (list the outreach channels you employed)
- Resident satisfaction with their consultation

Step 4: Determine Target Audiences

You should establish the marketing campaign's intended audience(s). This will help you concentrate efforts on the groups that are best positioned and/or most likely to engage in your program and those who may offer valuable networks and suggestions. Please see the Target Audiences & Stakeholders section for more ideas.

Step 5: Determine Messaging

Think about the messages you would like to convey to each target audience to be most effective. Messaging should vary by target audience because different groups will value different elements of the program. For example, residents that spend a large portion of their income on their energy bills may value the cost-saving elements the most, while those who are concerned about climate change may find reducing their carbon footprint to be the most powerful motivator.

Develop an effective messaging campaign by creating a value proposition statement for each target audience. This should be framed as an if/then statement from the point of view of the target audience that describes why they would care about your program. For example, a value proposition for residents who want to reduce their carbon footprint could be, "If I work with a coach to install the right heat pump for my home, I will reduce my greenhouse gas emissions and help preserve the environment for future generations."

Depending on target audience priorities, messaging could focus on other areas, including:

- **Comfort:** Heat pumps provide reliable heating and cooling to increase the comfort of your home. They can eliminate hot or cold spots, reduce noise, filter air, and add more temperature-controlled zones to a home or building.
- **Adding Air Conditioning:** Heat pumps provide efficient, comfortable, and quiet cooling to a home or building—a potentially life-saving addition to many homes that have historically lacked AC and are now faced with increasingly sweltering summer temperatures. Heat pump systems can provide cooling through existing air ducts or via efficient ductless systems, including some new models that can replace traditional window AC units.
- **Cost-Saving Opportunity:** Heat pumps are often three-to-four times more energy efficient than traditional heating systems, meaning a heat pump offers an opportunity to save on energy bills,

especially if you currently heat your home with fuel oil, propane, or electric resistance systems. They may also lower bills if you use gas, depending on factors like utility rates or insulation levels in your home. State or utility financial incentives help offset installation costs, and financing options are often available.

- **Self-Reliance and Energy Security:** By installing a heat pump, you increase your energy independence by decreasing your reliance on imported fuels that are susceptible to price fluctuations.
- **Proven Technology:** Heat pump technology has existed since the 1970s and has since been refined to perform more reliably and more efficiently, even in temperatures as low as -15 degrees Fahrenheit. Heat pumps have consistently outsold gas furnaces since 2021, and over four million homes across the United States rely on them to heat and cool their homes.
- **Community:** Join your community in supporting local businesses, creating a healthier environment, protecting future generations, and becoming more independent.

Step 6: Choose Outreach Channels and Activities

Outreach channels are places or networks (either physical or virtual) where you will communicate your messages. Choosing the right channels will help you target your specified audiences. Use a variety of channels to reach new audiences or reach the same audience from multiple directions. Please see the Outreach Channels section for examples and more best practices.

Good outreach activities incorporate all the previous steps—your target audiences, messages, and outreach channels. Outreach can include events, traditional media, visuals, and digital marketing. Please see the Outreach Activities section for more information.

The Resource List at the end of this chapter contains resources that describe effective activities from past energy coaching programs, sample marketing materials, and more. These resources be helpful in brainstorming your outreach activities.

Step 7: Plan Your Activities

Establish a schedule of activities to ensure consistent communication without exceeding your budget. A schedule can also help ensure that your marketing is relevant to the time of year. Careful planning will allow you to coordinate outreach to different target audiences without overwhelming any one specific group. You should update this schedule regularly (e.g., at weekly/biweekly/monthly meetings) with new ideas as the program progresses.

Here are some tips for when to schedule your marketing activities:

- Seasonal shifts such as spring and fall are good times to advertise, as this is when many people are naturally thinking about their heating/cooling system and any upgrades they may need. Themes to focus on in each season include:
  - *Spring*: Preparation for warmer weather, cooling and dehumidification capabilities of heat pumps, and the ability to add a heat pump to previously unconditioned spaces

  - *Summer*: Cooling and dehumidification benefits of heat pumps and availability of coaches to help in emergency situations
  - *Fall*: Preparation for colder weather, emergency readiness, and the reliability of heat pumps in cold temperatures
  - *Winter*: Emergency replacements or repairs of fossil fuel systems and how to access help quickly from energy coaches when existing HVAC systems fail
- Be aware of when water and property tax bills are distributed. This is a good opportunity to coordinate with relevant local departments to attach pamphlets or flyers to bill mailings to attract more attention to your programs.
- Take note of public-school schedules and avoid outreach during times when families may be traveling, such as vacation weeks.
- Consider holiday-themed advertisements, social media posts, and other marketing materials. For example, a New Year-themed advertisement could focus on starting fresh in the new year, accomplishing New Year's resolutions, and staying warm in the winter.
- Take advantage of seasonal events in your community, such as farmer's markets, festivals, and more. These offer great tabling opportunities or ways to advertise your program via word of mouth.

Target Audiences and Stakeholders

Engage with the proper audiences early and often to ensure that your coaching initiative has the desired impact on your community. Targeting your outreach will ensure that your program reaches all relevant members of your community and encourages them to participate. Include key stakeholders, such as HVAC contractors and other members of the workforce, municipal committees, real estate professionals, community-based organizations, community leaders, and more to amplify your messaging beyond just the intended recipients of coaching services. This broad group of stakeholders can help spread information about your program within their networks and lend credibility to your efforts. Community members often view these groups as trusted advisors. Please see the table below for a detailed list of potential target audiences and stakeholders listed by group.

Private Sector/ Businesses	• Restaurants, cafés, bars • Grocery stores, farmers markets • Farms	• Real estate developers & professionals • Financial institutions	• Gyms, sports centers • Hair salons / barber shops • Small business owners
Unions	• Labor unions for contractors	• Teachers (particularly for vocational schools)	• Public unions
Residents	• Senior housing • Homeowners	• Affordable housing developments	• Newcomers • Renters
Municipal Committees/ Boards	• Alternative Energy Committee • Council on Aging • Affordable Housing Committee • Board of Health	• Select Board • Capital Budget Committee • Cultural Council • Design Review Board	• Designer Selection Committee • Housing Authority • School Committee • Economic Development Committee

Under-represented Populations	• People with disabilities • Immigrants • Language minorities • Cultural minorities	• Seniors • Youth • Low-income households • Migrant workers • Undocumented immigrants	• LGBTQ+ community • Environmental justice populations • Indigenous communities • Veterans
Local Organizations	• Faith based • Non profits	• Advocacy • Direct services	• Equity-focused • Workforce development
Municipal Departments	• Town manager • Building & Inspections • Assessor's Office • Constituent/Neighborhood Services	• Elder Affairs • Emergency Management • Fire Department • Health Department • Immigrant Services Department	• Planning and Community Development • Treasurer/Collector's Office • Youth & Family Services
Community Development	• Community development corporations	• Non-profit organizations • Condo associations/HOAs	• Neighborhood/resident/civic associations

Adapted from the Metropolitan Area Planning Council Community Engagement Division (https://files-cdn.masscec.com/uploads/attachments/MAPC%20Stakeholder%20List.pdf)

Be strategic in identifying additional stakeholders for outreach. Some of these stakeholder groups may be more relevant than others depending on the goals of the program or factors that differ between municipalities. To determine which groups to prioritize, you may find it helpful to use a power-interest matrix. A power-interest matrix is a tool that is used to visualize the interest and influence each stakeholder has in your community. See example right:

In the context of outreach for a community-based program, a stakeholder with high power likely has a large network and a strong influence. Such parties may be helpful in facilitating outreach and building credibility and trust of the program. High interest likely indicates strong potential for the stakeholder to engage directly with the program (e.g., local contractors).

Sample Power-Interest Matrix*

*An entity's position on the matrix may differ by community

Adapted from Project Management by Abdullah Oguz

You should tailor the manner of and purpose for engaging with these different categories accordingly. Engage parties with high power for the purpose of expanding networks, and engage parties with high interest for the purpose of encouraging participation. Prioritize engaging with stakeholders with both high power and high interest, followed by those with either high interest or high power. Stakeholders closest to the bottom left corner (intersection between low power and low interest) can be lower priorities. These categories serve as general guidelines, you should use your best judgment when prioritizing outreach.

Outreach Channels

Determine which channels will allow you to engage your target audiences most effectively. Outreach channels include any medium (physical places, people, events, webpages, etc.) you can use to connect with your target audiences. You should develop a general idea of the channels your target audiences prefer while continuing to explore new channels throughout the life of the program. Regularly reviewing metrics (e.g., number of people reached, attendees at events, sign-ups, reactions, etc.) can be a great way to assess the successes or challenges of certain channels and can inform future outreach. The table below provides some examples of outreach channels that you could utilize.

Traditional Outreach Channels	• Local businesses • Store windows/pay counters • Property managers • Recreation leagues	• Word of mouth • Volunteer organizations • Local TV channels & ads • Cable TV ads	• Radio ads & interviews • Press releases • Local newspapers • Transportation (bus/train) stations
Municipal Channels	• Town message board • Website home page • Tabling at annual meetings	• Election year events • Town/city calendar	• Notices in bill mailings • Departmental newsletters
Equity-Focused Outreach	• English as second language programs • Community health centers	• Food banks • Assisted living communities • Community/senior centers	• Cultural centers & organizations • International stores/ restaurants
Online Platforms	• Newsletters	• Webinars/livestreams • Social media posts	• Social media ads
Youth & Families	• Scouting organizations • YMCA, Boys & Girls Clubs	• Schools/after-school programs • Mentoring programs	• Daycare centers
Partner Outreach	• Cultural centers/organizations • Libraries • Museums	• Faith groups • Schools & colleges • Environmental & equity groups	• Realtors • Senior centers • Hobby/recreational groups • Financial institutions

Adapted from the Metropolitan Area Planning Council Community Engagement Division (https://files-cdn.masscec.com/uploads/attachments/MAPC%20Stakeholder%20List.pdf)

Outreach Activities

Choose activities that link your target audience, the messages you want to convey, and the most effective channels to do so. To increase the likelihood of participation in the program, prioritize strategies that allow for direct and personal contact with target audiences. For example, coaches could hold heat pump Q&A sessions at senior centers to connect with older folks, or the outreach coordinator could post in school message boards to target parents. Have fun with your messaging; be creative and tailor your strategy to your community.

You should also tailor your outreach tactics to the program's funding structure. Most people need to see or hear a message at least seven times for it to resonate. Develop a plan and budget that allows for consistent outreach throughout the lifetime of the program. Consider your team's bandwidth too, as some outreach tactics require more planning and organization than others. It may be worthwhile to expend more resources and effort to reach a particular target audience that is more difficult to connect with (for example, spending money to produce marketing material in multiple languages in communities with significant non-English-speaking populations).

Below are examples of possible outreach activities:

- **Mail:** Physical mailings and targeted email lists are effective and inexpensive ways to reach your target audiences. You could send notices and information about how to easily participate in your program in the form of pamphlets, postcards, or flyers. You could also send targeted emails to various email lists—such as folks who have already engaged in town sustainability events—for more personalized outreach.
- **Bill Attachments:** A great way to get the attention of residents and highlight the cost saving benefits of heat pumps is to attach notices or flyers to bill mailings. If utilities distribute bills through an online portal, including a highlighted notice at the top of the page will serve the same purpose.
- **Open Houses:** Educational events can increase the visibility of your program and "demystify" newer technologies such as heat pumps. Engaging with heat pump installers to co-host tours of homes that have heat pumps is a great way for residents to see the benefits for themselves. On-site engagement also provides a setting for residents to ask questions. For events such as these, providing free goodies, scheduling them outside of working hours, making them family friendly, or holding giveaways can increase attendance.
- **Visuals:** An easy and relatively inexpensive way to increase your program's visibility is to post various types of visuals in high-traffic areas of your community. For example, you could place posters, handouts, and pamphlets in high-traffic areas such as libraries, shops, bus stops, or the post office. Local movie theaters often allow community programs to run ads prior to a film. You could also hang banners above main roads or at the town/city hall or place sandwich boards outside police/fire stations, at major intersections, and at community centers. You can offer lawn signs to residents who have participated in the program to encourage their neighbors to do the same. All visuals should feature a prominent and easy call-to-action, such as scanning a QR code, calling a phone number, contacting an email, or visiting a website. If possible, you should post visuals in multiple languages and have an alternate call-to-action that does not rely on internet access to ensure that your program is accessible to all members of your community.

- **Partner Outreach:** Partnering with various entities in your community, which can range from financial institutions to demographic-specific organizations like the local Council on Aging, can help you reach individuals outside of your networks. This is especially important when trying to reach audiences that may face barriers to accessing information about your program, such as low-income households, non-English speakers, or folks without internet access. Partnering with financial institutions to offer more attractive loans on equipment for program participants can help incentivize participation.
- **Tabling at Events:** Get active in the community and set up a table with information at various town events such as festivals, farmers markets, recycling/Department of Public Works (DPW) events, etc.
- **Press:** Although more resource-intensive, publishing interviews, press releases, and/or paying for ads in local newspapers provides the benefit of reaching a large audience through a trusted third party.

The table below provides more examples of outreach activities that your program may wish to utilize.

EVENTS	Kickoff event
	Tabling – farmer's markets, sustainability-related events, festivals, libraries, school fairs
	Speak at senior centers, cultural centers, local org meetings, school events
	Booth at town/city events & festivals
	Open house events to look at equipment
	Meet the installer events
	Parking lot day – tabling along a main street or parking spaces
	Community walk with program leadership
	Workshops & office hours with coaches and/or sustainability staff
	March in parades
	Heat pump 101/electrify your home events
	Invite local media to events
	Energy-saving event for kids with fun activities – could partner with library/museums
	Contractor & landlord-focused webinars/events
DIGITAL MARKETING	Articles/ads in local media
	Targeted emails to residents on relevant municipal & school email lists
	Post content on social media – interviews, success stories, program info
	Social media advertising
	Blog posts
	Post updates & sign-up links on school & town webpages
	Boost/promote website in Google search results
	Ask major employers to send newsletters/memos via email
TRADITIONAL MEDIA	Put events calendar in newspaper
	Word of mouth – ask installers, Mass Save, local orgs, realtors to share program details
	Ask state & local elected officials to send congratulatory press releases
	Publish interviews & success stories in newspapers
	Local TV, radio, & newspaper ads
	Press releases about launch, events, progress updates
	Letters to the editor in newspaper
	Offer streamlined permitting
	Partner with lenders to offer low interest rates on loans
VISUALS	Lawn signs
	Door hangers – leave on doors of houses & apartments
	Fliers – sent by mail, attached to bills, put in store windows, etc.
	Countdown clock for days left to sign up
	Messages in electronic bill payment portals
	Progress thermometer posters to goal – post around town
	Posters – community bulletin boards, libraries, etc.
	Sandwich boards/digital road signs along major roads, in front of public buildings
	Pamphlets/handouts – post office, local stores, libraries, etc.
	Banners in town center, hanging above major roads, etc.

Adapted from the Massachusetts Clean Energy Center's HeatSmart Mass community campaign details (https://www.masscec.com/program/heatsmart-mass)

Template – Marketing Campaign

Below is a template you can use to build out your marketing campaign. *Italicized text* indicates examples that should be deleted from the final version. Feel free to add more bullet points to expand the different sections of the plan as needed.

Purpose

Example: Establish a volunteer-based energy coaching initiative to provide guidance and increase knowledge of energy efficiency and clean heating in the community.

Goals

Goal 1: *Engage with 500 individuals through coaching and educational initiatives in five years, including 100 residents who speak a language other than English as their primary language.*
Goal 2: *[Your goal here]*
Goal 3: *[Your goal here]*

Metrics Tracking

Goal 1: *Engage with 500 individuals through coaching and educational initiatives, including 100 residents who speak a language other than English as their primary language.*

- *Use a CRM platform to record the names and contacts of residents who have participated in coaching or who have attended educational events. Metrics to track include:*
  - *Number of people who signed up*
  - *Number of people who followed through on a consultation*
  - *Number of people who installed equipment*

Goal 2: *[Your goal here]*

- *[Your subgoal here]*

Goal 3: *[Your goal here]*

- *[Your subgoal here]*

Target Audiences & Stakeholders

First priority:

- *Residents using delivered fuels or electric resistance heating*
- *Residents with high energy bills*
- *[Additional audience for this priority]*
- *[Additional audience for this priority]*
- *[Additional audience for this priority]*

Second priority:

- *Residents with no air conditioning*
- *Local HVAC installers*

- *[Additional audience for this priority]*
- *[Additional audience for this priority]*
- *[Additional audience for this priority]*

Third priority:

- *Small commercial building owners*
- *[Additional audience for this priority]*
- *[Additional audience for this priority]*
- *[Additional audience for this priority]*
- *[Additional audience for this priority]*

Messages

- *Landlords: Investing in heat pumps can make your property more appealing to potential tenants and can increase your property's value.*
- *Comfort: Heat pumps provide reliable heating and cooling to increase the comfort of your home. They can eliminate hot or cold spots, reduce noise, filter air, and add more zones to a home or building.*
- *[Additional message]*
- *[Additional message]*
- *[Additional message]*

Outreach Channels

- *Local newspapers*
- *Residents Facebook page*
- *Flyer bundled with water bill*
- *[Additional outreach channel]*
- *[Additional outreach channel]*

Outreach Activities

- *Work with local newspapers to publish articles featuring the coaching program, its success stories, and upcoming events.*
- *Regularly post content on social media such as digital flyers/infographics, coach bios, success stories, FAQs, etc.*
- *Attach flyers to each resident's water bill promoting the energy coaching program and highlighting cost saving opportunities.*
- *[Additional activity]*
- *[Additional activity]*

Schedule of Activities

Completed? (X)	Date/Time	Outreach Activity & Location	Target Audience(s)	Organizer
X	*6/24/25; 7:00pm*	*Kickoff Event – Library*	*Residents*	*Andy*
	7/1/25; 4:00pm	*Presentation – Senior Center*	*Senior citizens*	*Song*

Sample Marketing Resources

The table below contains resources developed and used by the Massachusetts Clean Energy Center and other coaching programs that you may find useful as you develop your marketing campaign.

Resource List

Purpose	Topic
Outreach Activity Supplementary Materials	Past examples (HeatSmart Mass) – click on municipality names for document to open
	Sample Outreach Plan Template (download)
Educational Resources	Air Source Heat Pump Overview Slides
	Air Source Heat Pumps – MassCEC
	Ground Source Heat Pumps – MassCEC
	Benefits and Savings – MassCEC
Marketing Materials	Sample ASHP Flyer
	Sample ASHP Flyer – For New Construction
	Sample GSHP Flyer
	Miscellaneous Sample Flyers
	Sample Postcards
	Sample Brochures
	Sample Lawn Signs
	Sample Door Hangers
	Sample Banners
	Sample Promotional Video
	Sample Financial Summary Handout (download)
Events	Launch Event Planning and Outcomes Checklist (download)
	Kickoff Event Example - HeatSmart Newton
	Meet the Installers Event Example – HeatSmart Newton
Metrics	Identifying Equity-Centered Tracking Metrics – NEEP
	Sample Midpoint Report – York, ME

Chapter 2 Conclusion

Every community is different—they have different key stakeholder groups, priorities, demographics, infrastructure, processes, etc. You will need to gauge the level of outreach you need to perform to consider your program a success. In some communities, residents won't need much persuasion and will come to you with minimal outreach. In other cases, you will need to host educational events and perform mass outreach to attract residents. The above materials can be used for one-off activities or full outreach strategies. Use the example marketing materials from the Massachusetts Clean Energy Center to kick-start your communication.

CHAPTER 3: MODEL WEBSITE LANGUAGE

Introduction

A webpage or website is a crucial aspect of a community energy coaching program. It is where residents will go to find more information and where they will find out how to schedule consultations. You can also use it to publicize upcoming events.

Creating content for a webpage or website can be a large time commitment. For this reason, NEEP has prepared the following guide to help you, a municipal staff or community group member, easily create a simple webpage or a complete website to accompany your energy coaching program. The guide includes tips and model language that you can use and modify as needed to suit the needs of your program.

There are two models in this guide. You can choose the one that best fits your needs.

- **Complete Website**
  - The complete website assumes that you have a standalone web domain. It has lots of content split between multiple pages. This is ideal but not always feasible due to resource constraints.
- **Single Webpage**
  - The single webpage is useful when your coaching program will be housed on an exisiting website such as a municipal government website and you are not able to have multiple pages. It utilizes collapsable sections called accordians to pack more information into a small space.

Host

Ideally, the webpage(s) would live on the municipal website to give residents confidence in the program; however, it may give you more flexibility to make a standalone website. Consider the following pros and cons and evaluate which option would suit your residents' needs.

Pros of hosting webpage(s) on municipal website:

- If your municipality has an energy/sustainability/climate committee, residents may naturally search the committee's website for information about the coaching program before looking to other websites.
- Hosting your program's webpages on the municipal website creates a sense of trust among residents, especially since coaching is a free service.
  - Websites with more content are prioritized in search results. Your webpages are more likely to appear first in search results if they are hosted on the municipality's website, which contains other content.

Cons of hosting webpage(s) on municipal website:

- You may be limited in what language you can use, website functionality, and access to website updates.
- Organizing your webpages in an intuitive way may be difficult on a municipal website that hosts so much other content.

Design Tips

Optimization for Mobile Use

Over 50 percent of web traffic is accessed via mobile devices. Therefore, all website/webpage functionality should be accessible on mobile devices (phones and tablets) as well as laptops and desktop computers. Most mobile optimization is in the hands of your web designer or the tool you use to develop your site (WordPress, Wix, etc.); however, the following tips can help optimize your site for mobile access:

- Make sure buttons that link to other pages or websites are appropriately sized. Too big and they may be susceptible to accidental clicks and may block other content on the page, too small and they may be too difficult to click.
- Keep text (including titles) short, as mobile screens are smaller than laptops or tablets. Chunks of text will appear to be longer on mobile devices.
- Test your website on mobile screens, tablets, and laptops before launching it.

Accessibility

Consider non-English speakers and individuals with disabilities so they may access the information as well. The Americans with Disabilities Act requires state and local governments to follow certain guidelines when developing web content. For more information about this rule and the ADA, please see the official version of the rule published by the Federal Register.

Using the following best practices can improve your website's accessibility.

- Provide translations in the most prevalent languages in your community. Do not assume everyone speaks or reads English.
- Provide a text alternative to non-text content such as images, diagrams, or videos with no audio component. This short description, called "alternative text" or "alt text," will allow a screen reader to describe the meaning and important points of the content to an individual with vision loss. We have provided alt text for the images in the model.
- For videos that have an audio component, provide closed captioning.
- For audio-only recordings, provide a transcript. The audio should also have both a pause and a volume control feature separate from the device's volume control.
- Avoid conveying information solely through color. For graphs, color can be used in tandem with patterns to distinguish between categories (and provide alt text). Using word choice to emphasize important points in text instead of only color coding, bolding, or italicizing can improve accessibility for individuals with vision loss or color blindness. If you cannot use patterns, ensure that color combinations are easily distinguishable by residents with color blindness. Some examples of accessible color palettes can be found here.
- Provide the option to switch to high contrast colors and to resize the text, but ensure that doing so doesn't impact the website's functionality.
- Ensure that the purpose of each link is clear and can either be determined from the text of the link or the context surrounding it. Avoid pasting in full URLs and instead modify the text of the hyperlink to serve as a description.

COMPLETE WEBSITE MODEL

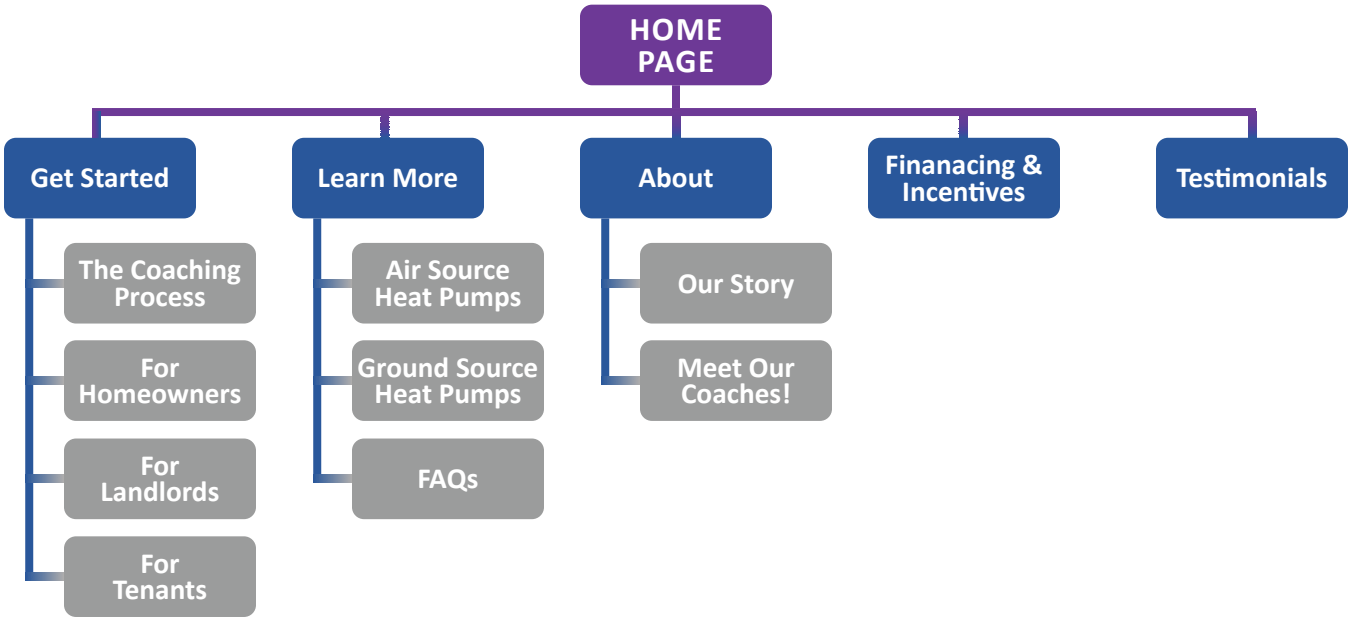
The following model provides language and sample content for a full website—complete with a home page and numerous other pages. Feel free to modify this language as you see fit. Language can be copied from this document into your web editor. You should aim to update this website about every six months to one year, particularly with testimonials, updated metrics, and incentives.

The color code at the top of each page is intended to help you understand the layout of the model. The key to the model is as follows:

- *Notes and suggestions are italicized.*
- [Highlighted content within brackets denotes fill-in-the-blanks.]
- **Blue boxed headings** indicate a menu item or webpage.
- **Grey boxed headings** indicate a child page.
- ***Green, italicized headings*** indicate a new section or heading in the current webpage.
- Dark green underlined text indicates areas where you should link to webpages within the same website (e.g., a link from the home page to the Financing and Incentives page) in your web editor.
- Blue underlined text indicates active links to external websites.

The pages below follow the structure of a sample site map. A site map is a visual representation of a website's structure. It identifies parent pages and sub-pages allowing you to best position content. Pages can be moved or changed to fit your needs. The site map should be fairly similar to the website's menu. Note that pages such as "Get Started" and "Learn More" are menu items—that is, they are not webpages with content themselves, but headers to organize sub-pages (child pages). We use this site map periodically throughout this model to indicate the page we are referencing.

Sample Site Map



HOME PAGE

This page should include some photos of heat pumps, sustainability-related initiatives in your community, etc. It also may be helpful to have a side bar or a callout box featuring upcoming events.

About [Program Name]

You should update the metrics in this section every six months to share your most recent progress.

[Program name] is an official program of [municipality/organization name] and [partners] that started in [year]. Improving the efficiency of your home has many benefits but can be a complex process. We aim to educate our residents about the comfort, cost, and environmental and health benefits of energy efficiency and clean heating and cooling technologies, as well as how to take advantage of financial incentives. Since the program kicked off, we have helped over [number] residents of [town/city] install heat pumps.

[If your program features selected installers, share information about each with logos and a brief overview of the selection criteria explaining how the installer(s) were picked.]

The following link could be a button or hyperlink pasted into the body of the text.

More About Us *(Link to About page)*

Energy Coaching

Replacing your home's current heating and cooling system can be a complicated process. Our volunteer coaches offer their services free of charge to help you learn more about heat pumps and guide you through the process of installing them. Coaches will work with you one-on-one to help you:

- Understand heat pump technology and whether it is right for you.
  - Answer questions you have about heat pumps or heating and cooling.
  - Speak with installers.
  - Compare quotes.
  - Identify financing options and take advantage of available state and federal incentives.

Book an Appointment with a Coach *(Link to coach request form or scheduling platform. This could be a button or a link.)*

Learn More About the Coaching Process *(Link to Coaching Process page)*

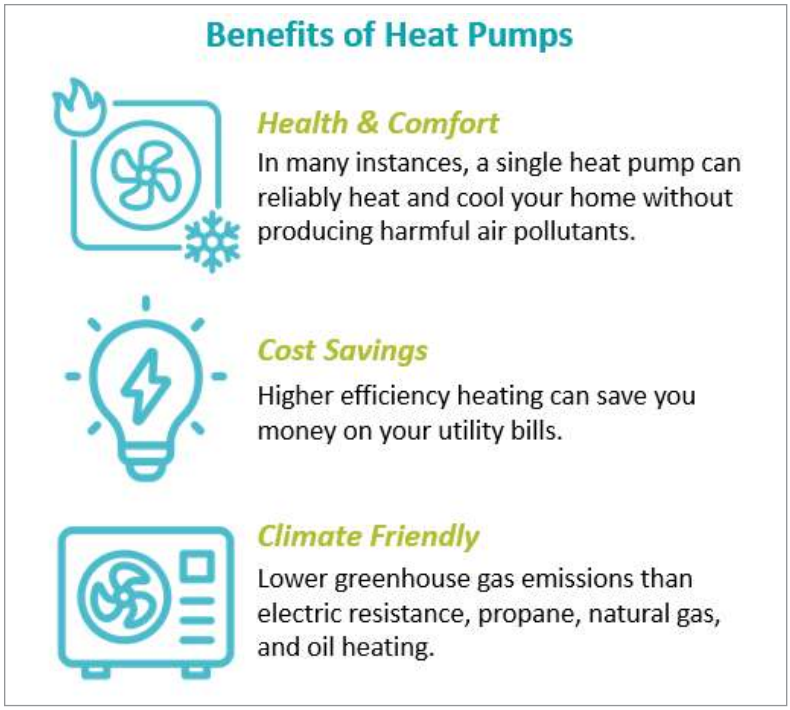
Meet Our Coaches *(Link to Meet the Coaches page)*

View [town/city]'s Climate Action Plan *(Link to climate action plan or Our Story page)*

What Is Clean Heating and Cooling?

Clean heating and cooling technologies use electricity instead of fossil fuels to heat and cool a space. Heat pumps are a type of clean heating and cooling technology that relies on heat transfer instead of heat generation to ensure comfortable temperatures for your home. You are already familiar with heat pump technology whether you know it or not! Refrigerators, freezers, and air conditioners are all types of heat pumps that operate using the refrigeration cycle.

What makes an air or ground source heat pump different from these appliances is that they can be used to provide heating as well as cooling. Think about the hot air that blows from the back of a window air conditioner. In the summer, heat pumps move heat outside, while in the winter they move heat inside. Air source heat pumps move heat to/from the air outside your home, while ground source heat pumps move heat to/from the ground using ground loops that circulate fluid. Because heat pumps transfer heat instead of generating it, they can heat and cool your home more efficiently than natural gas, electric resistance, fuel oil, or propane heaters. Modern advancements in air source heat pump technology allow heat pumps to produce heat even when outdoor temperatures reach -15 degrees Fahrenheit.



Alt text: Graphic showing heat pump benefits. In many instances, a heat pump can reliably heat and cool your home without producing harmful pollutants, save you money on utility bills, and lower greenhouse gas emissions compared to propane, natural gas, oil, or electric resistance heating.

Performing weatherization upgrades such as air sealing, insulation, and weatherstripping in combination with installing a heat pump can further reduce your energy bills. This is because weatherization reduces the amount of thermal energy that escapes your home, which lowers the amount of energy required to heat or cool it.

Impact

[List your program's goals, link to press releases/reports/newsletters containing program updates, list tracked metrics.]

Metrics tracking should highlight community progress toward a common goal. For example, your website could feature the number of installed systems relative to an installation goal, tons of greenhouse gas emissions avoided, the number of residents who have engaged with coaching services, etc. We recommend updating this page every six months to track your most recent progress and accomplishments.

Events

[List events or paste a calendar of events here.]

Get Started

Get Started is a menu item with the following child pages:

- The Coaching Process
- For Homeowners
- For Landlords
- For Tenants

The Coaching Process

What to Expect

Our coaches are trained volunteers and residents of [municipality name] who can answer your questions, facilitate your transition to heat pumps, and help you access incentives. [Municipality name] provides coaching services at no cost to you. You can expect your coach to:

- Meet with you virtually for a [time-duration] consultation
- Discuss your priorities and the details of your current heating and cooling systems
- Recommend heat pump equipment and system designs that meet your needs
- Answer your questions and help you become more informed so you can make your own decisions
- Teach you how to speak with installers and review quotes
- Help you determine financing sources and apply for incentives
- Follow up with you during and after the installation to answer remaining questions and address any concerns you may have
- [Add bullets for any specifics of your program]

Below is a sample graphic showing the coaching process. Feel free to modify.

Alt text: Graphic displaying the energy coaching process. The first step is to meet with a coach, followed by contacting installers, reviewing quotes and determining financing sources, installing heat pumps, and finally enjoying your comfortable, more efficient living space.

🔗 Request a Coach *(Link to coach request form or scheduling platform. This could be a button or a link.)*
🔗 Meet Our Coaches

For Homeowners

Heat pumps can reliably warm your home in the winter and cool it in the summer, ensuring comfort all year round. Properly sized and designed heat pumps should be able to perform in temperatures as low as -15 degrees Fahrenheit. In addition, they operate quietly and can save you money on your energy bills and reduce your carbon footprint due to their efficiency. Below is a list of benefits:

- Reduce your home's energy consumption, leading to potential savings on your utility bills. Properly weatherizing your home along with installing heat pumps can further increase your savings.
- May increase your home's value.
- Replace your current heating and cooling systems with a single system to both heat and cool.
- Add cooling capacity to your home if you don't already have it.
- Improve your HVAC system's reliability and reduce maintenance costs—heat pumps often require minimal maintenance and are more reliable than many other HVAC systems, which can help avoid unexpected problems.
- Reduce your building's greenhouse gas emissions.
- Add more zones to your home for precise climate control.

🔗 About the Coaching Process
🔗 Request a Coach

Historic Homes

[Insert information regarding modifications to historic homes in your municipality.]

This section should include a general statement of whether it is possible to install heat pumps in a historic home in your municipality, what municipal committees or councils the resident may need to consult, and how to determine if a home is a historic home. Some tips about how to safely hide a heat pump from view (language found in the FAQ section) may be helpful as well.

For Landlords

Making energy-efficiency improvements to your buildings, like weatherizing and installing heat pumps can benefit both you and your tenants. They can reduce your property's operating costs, decrease the need for HVAC maintenance, improve your tenants' comfort and satisfaction, and lower your building's reliance on fossil fuels. Heat pumps could be a great option for your properties if you would like to:

- Reduce your property's energy consumption, leading to savings on your operating costs and your tenants' utility bills.
- Increase your property's value.
- Replace your current heating and cooling systems with a single system to both heat and cool.
- Add cooling capacity to buildings that do not have any.
- Improve your HVAC system's reliability and reduce maintenance costs—heat pumps often require minimal maintenance and are more reliable than many other HVAC systems, which can help avoid tenant complaints and unexpected problems.
- Increase your property's appeal to current and future tenants.
- Improve tenant retention.
- Reduce your building's greenhouse gas emissions.

Financial Incentives
About the Coaching Process
Request a Coach

For Tenants

Owning your own property is not a requirement to participate in [program name] or experience the benefits of energy-efficiency upgrades. However, major upgrades such as equipment swapping and weatherization improvements will require collaboration with your landlord.

Here are some simple actions you can take without the support of your landlord:

- Get a home energy audit. [State name] offers [free/low cost/list the cost] home energy assessments for tenants. These assessments are a great way to learn how to reduce your home's energy usage, and much of the time they do not require landlord permission.
- Seal the gaps between windows and doors to reduce heat loss.
- Use LED lightbulbs.
- Use advanced energy-saving power strips.
- Clean the air filter on your furnace or heat pump every three months.

- Switch ceiling fans to turn counterclockwise in the summer and clockwise in the winter. The blade direction switch should be located either directly above or below the blades. Counterclockwise rotation creates a downdraft to create a cooling breeze while clockwise rotation circulates warm air throughout the room without creating a breeze.
- Keep your thermostat (if you have one) at lower settings. Try to set your thermostat at 68 degrees in the winter and 78 degrees in the summer. If you're away from home, set it to 58 degrees in the winter and 85 degrees in the summer. Using a smart thermostat to change the temperature based on a schedule can make this easier.

Visit the For Landlords page if you would like to learn how to talk to your landlord about the benefits of heat pumps.

Request a Coach
About the Coaching Process
For Landlords

Learn More

Learn More is a menu item with the following child pages:

About Air Source Heat Pumps
About Ground Source Heat Pumps
FAQs

Air Source Heat Pumps

A heat pump is a super-efficient, economical, and environmentally friendly way to heat and cool your home for year-round comfort. Heat pumps run on electricity but are extremely efficient and affordable to operate. This is especially the case if you combine heat pumps with appropriate weatherization, which minimizes the amount of thermal energy that escapes your home. Proper weatherization can significantly reduce the amount of energy your HVAC uses to heat/cool your home, thereby reducing your energy bills.

An air source heat pump works by harvesting thermal energy from the atmosphere. Heat pumps can push that energy into or out of your home, even at below-zero temperatures. Modern cold climate models produce plenty of heat, even

when outdoor temperatures fall to 5, -5, or even -15 degrees Fahrenheit. During cold months, a heat pump extracts heat from the cold outdoors, concentrates it, and delivers it inside to keep you comfortable all winter. In the summer, a heat pump runs in reverse, pumping heat from inside back outdoors. Heat pumps are efficient because less energy is required to move heat than to create it. A fossil fuel heating system is 80-90 percent efficient, meaning that 10-20 percent of the fuel that you pay for is wasted. In comparison, an air source heat pump is 200-400 percent efficient, providing/removing two to four units of energy for every unit of electricity spent.

There are two main types of air source heat pumps: ducted and ductless. Each type has hundreds of models available on the market today. This means there are thousands of system configurations (a "configuration" is a specific arrangement of outdoor and indoor unit types) that can be adapted for different home layouts. Ducted and ductless heat pumps can be custom-designed, mixed, and matched to meet your home's heating and cooling needs.

Cold climate air source heat pumps are specially designed to operate in colder conditions and come in both ducted and ductless configurations. A cold climate heat pump will function reliably in temperatures as low as -15 degrees Fahrenheit, although it will lose efficiency in extreme conditions. These heat pumps will also cool your home in the summer as any heat pump would. We recommend buying a cold climate heat pump to ensure your home is comfortable no matter the season; please check NEEP's Cold Climate Air Source Heat Pump List for specific system suggestions.

Ducted Heat Pumps

Ducted air source heat pumps use your home's existing ductwork (or new ducts if needed) to disperse heated or cooled air throughout your home. The unit is connected to an outdoor compressor and replaces a traditional central system like a furnace or a furnace with central AC. Many ducted heat pumps are centrally ducted systems that serve several rooms or an entire house. A variant of ducted systems known as "compact-ducted" uses much smaller air handlers that usually serve two to four rooms.

Ductless Heat Pumps

Ductless air source heat pumps are often called "mini-split" heat pumps. Just like with a ducted heat pump, a ductless heat pump has an outdoor compressor that is connected to an indoor unit. Each indoor ductless unit or "head" serves a specific room or area. They are easier to install where there is no existing ductwork. Ductless heads are usually mounted high on the wall, but other models, which are mounted low on the wall or embedded in the ceiling, also exist.

Single- vs. Multi-Zone Heat Pumps

A single-zone heat pump pairs one outdoor unit with one indoor unit. The most common single-zone configuration for air source heat pumps is the "ductless mini-split," but single-zone systems can also be ducted. A home can have several separate single-zone systems. A "multi-zone" configuration is a single outdoor unit paired with two or more indoor units, to accommodate multiple indoor areas or "zones." Multi-zone configurations can include multiple ducted or ductless units, or a mix of both.

Ground Source Heat Pumps

Heat pumps are energy efficient and climate-friendly systems that can provide year-round comfort to your home. Heat pumps run on electricity instead of delivered fuels such as propane or natural gas and operate extremely efficiently, making them affordable to operate. Proper weatherization (e.g., air sealing, weatherstripping, insulation) can further improve operating costs; such measures minimize the amount of thermal energy that leaks out of your home and therefore decrease the amount of energy required to heat/cool your home to the desired temperature.

A ground source heat pump is a type of heat pump that uses the relatively consistent temperature underground to move heat from the ground into indoor spaces in the winter, and from indoor spaces into the ground during the summer. Because the average temperature just a few feet underground is around 55 degrees Fahrenheit in the Northeast, ground source systems can effectively heat and cool buildings year-round no matter how cold it is outside. In these systems, liquid flows deep into the ground through pipes, often 100-300 feet deep for single-family residential applications or around 500 feet deep for larger systems. During its journey through the underground pipes, the liquid either warms up or cools down depending on the season. It then moves through a heat pump, which extracts heat from the liquid and moves it into the building.

According to the laws of physics, a lot less energy is required to move heat than to create it. A fossil fuel heating system is 80-90 percent efficient, meaning that 10-20 percent of the fuel that you pay for is wasted. On the other hand, a ground source heat pump is 300-500 percent efficient, providing or removing three to five units of energy for every unit of electricity spent.

Most ground source heat pumps use a centrally ducted distribution system, which requires existing or new ductwork; however, ground source heat pumps can also utilize a radiant floor system or low temperature radiators, which do not require ductwork. Modern systems can also leverage ductless air distribution similar to air source heat pumps.

FAQs

These questions could be formatted as bullet points, a question with a drop-down section for the answer, questions as headers with text underneath for the answer, etc.

Q: How would a heat pump decrease my home's energy bills?

A: Heat pumps are more energy efficient than gas/propane/oil/electric resistance heaters, meaning that they can heat/cool your home to the same degree as traditional heaters with less energy input. Heat pumps are so efficient because they move, or "pump," heat instead of generating it. Fossil fuel heating systems are 80-90 percent efficient, meaning that 10-20 percent of the fuel that you pay for is wasted. On the other hand, an air source heat pump is 200-400 percent efficient, and a ground source heat pump can be as much as 500 percent efficient. This means that for every unit of electricity you pay for you get two to five units of heat energy. Combining a heat pump with weatherization upgrades can further reduce your home's energy bills—appropriate weatherization will minimize leakage of conditioned air out of your home, thereby reducing the amount of energy required to heat/cool it to your desired temperature.

Q: Can heat pumps be effective in the summer and the winter?

A:
- *Air Source Heat Pumps*: For air source heat pumps, we recommend purchasing a cold climate heat pump. Cold climate heat pumps are specially designed to heat your home reliably at temperatures as low as -15 degrees Fahrenheit. However, a heat pump's efficiency can drop at extremely low temperatures.

  Your installer will be able to recommend specific models that are best for your home, but examples of cold climate air source heat pumps can be found on NEEP's Cold Climate Air Source Heat Pump list.
- *Ground Source Heat Pumps*: Even if temperatures above ground are sub-zero or over 100 degrees Fahrenheit, the temperature below ground generally remains consistent (between 40-70 degrees) year-round. Ground source heat pumps can operate even when temperatures above ground are extreme.

Q: What incentives are available for heat pumps?

A: There are many financial incentives available for heat pumps depending on the specifications of your system, your income, and details about your home. See the Financial Incentives page for more information.

Q: Can I install a heat pump if my home doesn't have ductwork?

A:
- *Air Source Heat Pumps:* Yes! Ductless air source heat pumps, often called mini-splits, do not require any pre-existing infrastructure like ducts or radiators. Check with a knowledgeable contractor to learn more about the solutions that will work best for your home and your needs.
- *Ground Source Heat Pumps*: Yes and no; ductwork is the most common distribution method for ground source heat pumps. However, there are some ground source heat pump configurations that do not require ductwork and instead utilize low-heat radiators and radiant flooring systems. Ground source heat pumps are NOT a drop-in solution for forced hot water systems and will require new radiators that operate at lower temperatures. Check with a knowledgeable contractor to learn more about the solutions that will

work best for your home and your needs. Some manufacturers are beginning to produce ground source heat pumps with distribution through ductless wall units, similar to ductless air source heat pumps.

Q: Can I still use my existing heating or cooling system if I install a heat pump?

A: Yes, both ducted and ductless systems can be installed in configurations that allow for the use of the existing HVAC system. Please note that some incentives may require decommissioning your old system.

Q: When is a good time to replace my home's heating/cooling system with a heat pump?

A: The best time to get a heat pump is when your existing HVAC system is nearing the end of its life but before it fails. The average lifespan of an HVAC system is 15-20 years.

As summers get warmer, it could make sense to install a heat pump for its cooling capacity, especially if your home does not have central air conditioning.

Q: What are the drawbacks of heat pumps?

A:
- Heat pumps are initially more expensive than fossil fuel systems. Depending on local utility rates, they can pay for themselves and lead to cost savings over time, but this can take many years. This is particularly true of ground source heat pumps, which involve a significant initial investment.
- Operating costs are not always clear and are largely affected by your gas and electric utility rates. Operating costs also depend on your home's weatherization, insulation, and air sealing.
- Air source heat pumps require equipment to be placed outdoors, which may have aesthetic impacts on your building. Not everyone likes the look of indoor ductless heat pump heads.
- Air source heat pumps can produce heat at temperatures as low as -15 degrees Fahrenheit; however, they begin to lose capacity below five degrees and become less efficient as the outdoor temperature drops.

Q: Are heat pumps loud?

A: No! Both ground source and air source heat pumps make less or about the same noise as a typical central air conditioning system or a refrigerator.

Q: How much disruption to my home will installing a heat pump cause?

A:
- *Air Source Heat Pumps*: Installing a single-zone air source heat pump like a ductless mini-split is an uncomplicated process that can be completed in less than a day without much disruption to your space. If you are installing a multi-zone or ducted heat pump, construction can take a few days.
  The installation process can also take longer if your electric supply panel is at capacity or if your electrical panel needs upgrading to support your heat pump. Your installer should be able to tell you if you need an additional subpanel for your circuit breaker or an electrical service upgrade.
- *Ground Source Heat Pumps:* Ground source heat pumps can take 2-3 months to install and involve a higher level of disruption because the system design is complex and requires drilling bore holes and installing pipes below the ground. For this reason, we do not recommend installing ground source heat pumps if you are currently without functioning HVAC or if you are on an accelerated timeline.

Q: How long will my heat pump last?

A:
- *Air Source Heat Pumps*: Air source heat pumps usually last about 15 years, which is similar to the lifespan

of a traditional central air conditioning system or a furnace (15-20 years).

- *Ground Source Heat Pumps*: The ground loop portion of a ground source system can last for over 50 years, but the indoor heat pump will last for about 15-20 years.

Q: What maintenance does a heat pump need and how much does it cost?

A:
- *Air Source Heat Pumps: Annual maintenance for an air source heat pump costs about as much as annual* maintenance for a furnace. Although it's best to have a professional inspect your system each year, you can clean the filters on your own. Cleaning the filters every few months can help the system run more efficiently and improve its longevity. Check your filters regularly to make sure the heat pump remains free of any obstacles blocking its vents.
- *Ground Source Heat Pumps*: Ground source heat pumps require very little maintenance, although they do need regular checkups and filter changes.

Q: Can I install a heat pump in an older building?

A: Yes, but your installer may recommend some repairs to your home before installing the system. Many older buildings require weatherization upgrades such as insulation or air sealing to prevent conditioned air from escaping your home. This will help your system run more efficiently so you can optimize your savings and maximize system longevity. Ducted or compact ducted heat pump systems are a better choice for older homes that have lots of small rooms. This is because an indoor ductless unit will produce too much heat/cooling for a small space while a ducted unit can better distribute small heat loads. Ductless units work best in large rooms or open concept buildings.

Q: What if I want to install a ground source heat pump but I don't have much outdoor space?

A: Ground source heat pumps will not take up yard space, as they are constructed underground. Your installer will be able to assess the best placement and configuration of a ground source heat pump at your home.

Q: Is there a way to hide my heat pump if I don't like how it looks?

A: Yes—your installer can help make it more visually appealing. You can hide an outdoor unit with shrubs, a fence, a privacy screen, or other solutions as long as you allow for proper ventilation. It's a good idea to leave some space around the heat pump to allow air to flow in and out of it.

Indoors, you could install ceiling units that are almost flush with the ceiling. If you opt for the more traditional upper wall or lower wall units, then you can conceal them with hanging plants or a decorative cover, or place them in a less visible recess. Avoid using any moisture-sensitive items to cover the units, and don't cover the vents or place anything on top of the unit. Ensure that any covers are easily removable in case you need to access the unit for repairs or maintenance.

Q: Do I need to be careful of frost and snow?

A: Outdoor air source heat pump units are typically installed on stands above the ground to avoid blocking the vents with accumulated snow. In heavy snowstorms, keeping an eye on the system and making sure snowbanks do not pile up around the heat pump is important. Air source heat pumps have a built-in defrost cycle that will melt ice on the outdoor unit. If the system gets overwhelmed with snow or ice, its sensors will automatically shut it down to prevent a safety hazard.

About

About is a menu item with the following child pages:

Our Story
Meet Our Coaches!

Our Story

You should aim to update this page every six months with the most recent metrics if available. The following content was adapted from the HeatSmart Newton website.

[Program name] is a community-based, volunteer-run clean heating and cooling initiative to help residents improve home comfort, use less energy, and reduce greenhouse gas emissions. Managed by [municipal committee name, partner orgs, etc.], [program name] is an official program of [municipality name]. The initiative began with [details of any grants, climate action plan mandates, etc.].

Heating, cooling, and hot water from residential buildings account for nearly [X percent] of [municipality name]'s greenhouse gas emissions. By promoting the adoption of efficient heat pump technology, [program name] is working to help our community reduce its greenhouse gas emissions as we move toward [municipal or program-specific decarbonization goal details].

Only include if your program features a selected installer: [Program name] works closely with our vetted partner installer(s): [partner installer name(s)]. The [program name] team, along with our partner installer, can also help you maximize your savings by offering a group discount to [program name] participants and helping connect you with the latest rebates, tax credits, and financing.

Questions? [Details about whom to contact with questions.]
Ready to get started? Book an appointment with a coach and take the first step to clean heating and cooling!
Optional: [Links to municipality's website, climate action plan, partner organizations*]*

Meet Our Coaches!

You should update this page frequently (every six months) to account for any turnover among coaches.
[Short bios about each coach including their name, a photo, contact information, professional experience, hobbies, and any fun fact(s)]
Request a Coach

Finanacing & Incentives

You should update this page every six months, as incentives change often. We also recommend avoiding specifying dollar amounts of incentives and instead linking the incentive's website to prevent inaccuracies as incentives change.

These example incentives only apply to Massachusetts municipalities served by investor-owned utilities (Eversource, National Grid, or Unitil). If your municipality is served by a municipal light plant (MLP) or is outside of Massachusetts, then you will need to change the information. Some good places to find incentives available in your area are the Database of State Incentives for Renewables & Efficiency (DSIRE), Rewiring America, or your MLP's website.

Single-Family Incentives

AIR SOURCE HEAT PUMPS – SINGLE-FAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Federal Tax Credit	Tax credit of a percentage of project cost.	**No**
Massachusetts Department of Energy Resources (DOER)	Apply to the Alternative Portfolio Standard (APS) program to start selling Alternative Energy Certificates (AECs) generated by your heat pump.	**No**
Mass Save	Rebate determined by heat pump size.	**No**
Mass Save	Enhanced rebate per heat pump.	**Yes**
Mass Save HEAT Loan	0% financing on heat pump loans through third-party lenders.	**No**
Massachusetts Community Climate Bank	Low interest rates on loans supporting home energy-efficiency improvements.	**Yes**

**Conditions may apply. See links for more details.*

GROUND SOURCE HEAT PUMPS – SINGLE-FAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Federal Tax Credit	Tax credit of a percentage of project cost.	**No**
Massachusetts State Tax Credit	Exemption from state sales tax on heat pump equipment.	**No**
Massachusetts Department of Energy Resources (DOER)	Apply to the Alternative Portfolio Standard (APS) program to start selling Alternative Energy Certificates (AECs) generated by your heat pump.	**No**
Mass Save	Fixed rebate amount per home.	**No**
Mass Save	Enhanced rebate amount per home.	**Yes**
Mass Save HEAT Loan	0% financing on heat pump loans through third-party lenders.	**No**
Massachusetts Community Climate Bank	Low interest rates on loans supporting home energy-efficiency improvements.	**Yes**

**Conditions may apply. See links for more details.*

Multifamily Incentives

AIR SOURCE HEAT PUMPS – MULTIFAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Mass Save	Rebate determined by results of required energy audit.	**No**
Mass Save/LEAN	Full coverage of project costs.	**Yes**
Massachusetts Community Climate Bank	Low interest rates on loans for energy-efficiency improvements for properties with 2-4 units.	**Yes**

**Conditions may apply. See links for more details.*

GROUND SOURCE HEAT PUMPS – MULTIFAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Mass Save	Rebate determined by results of required energy audit.	**No**
Massachusetts Community Climate Bank	Low interest rates on loans for energy-efficiency improvements for properties with 2-4 units.	**Yes**

**Conditions may apply. See links for more details.*

Testimonials

Testimonials could be self-submitted by residents, or you could interview residents who agree to be featured. For example, you could feature a "project of the month" spotlight or something similar. Testimonials should be from a variety of demographics to showcase multiple different benefits of participating in your coaching program and installing heat pumps (tenants, homeowners, landlords, individuals who don't speak English, etc.). You should aim to update this page every six months.

[Case studies/project spotlights about successful projects]

SINGLE WEBPAGE MODEL

The following model provides language and sample content for a single page webpage. Feel free to modify this language as you see fit. Language can be copied from this document into your web editor. You should aim to update this website about every six months to one year, particularly with testimonials, updated metrics, and incentives.

The key to the model is as follows:

- *Notes and suggestions are italicized.*
- [Highlighted content within brackets denotes fill-in-the-blanks.]
- **Purple heading** indicates the title of the webpage. Headings will be centered and use a larger font size.
- ***Green, italicized headings*** *indicate an accordion where more information appears when you click the title.*

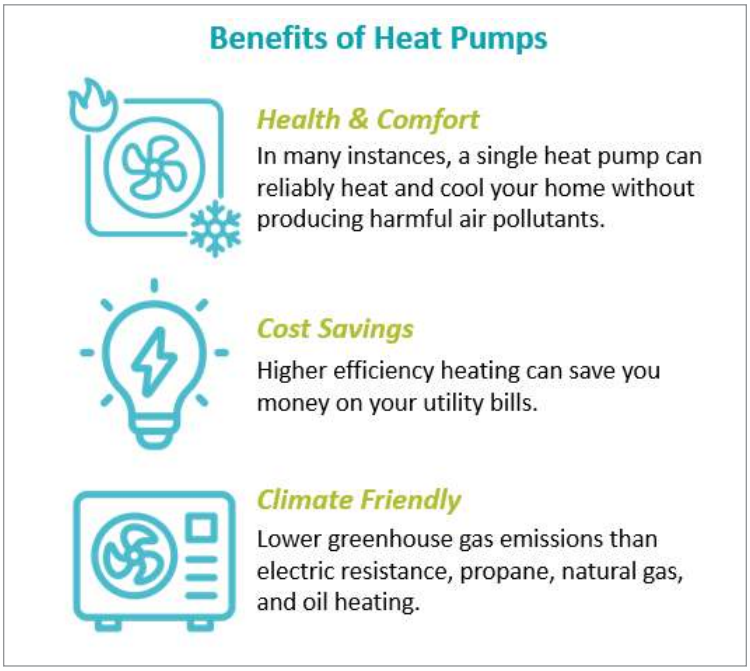
Page Format:

TITLE	
TEXT: Intro/About	Visual
ACCORDION: What Is Energy Coaching?	
ACCORDION: What Are Heat Pumps?	
ACCORDION: Financial Incentives	
TEXT: Meet Your Coaches	Photo(s) of your coaches
ACCORDION: FAQs	
TEXT: Other Important Information	Visual

[TITLE]

Want to save money on your utility bills and go green? Connect with one of our no-cost energy coaches and learn about your options!

[Program name] is an official program of [municipality/organization name] and [partners] that started in [year]. Improving the efficiency of your home has many benefits but can be a complex process. Our goal is to educate community members about the comfort, cost, and environmental and health benefits of energy efficiency and clean heating and cooling technologies, as well as how to access financial incentives. Since this program launched, we have helped over [number] residents of [town/city] install heat pumps in their homes.



(Accordion for) What Is Energy Coaching?

Heat pump installation projects can be complicated. Every home has different needs, and every person has different priorities. Our coaches are trained volunteers and residents of [municipality name] who can answer your questions, facilitate your transition to heat pumps, and help you evaluate incentives. [Municipality name] provides coaching services at no cost to you. You can expect your coach to:

- Meet with you for a 60-minute consultation
- Discuss your priorities and the details of your current heating and cooling systems
- Recommend heat pump equipment and system designs that meet your needs
- Answer your questions to help you become more informed so you can make your own decisions
- Teach you how to review quotes and speak confidently with installers
- Help you determine financing sources and apply for incentives
- Follow up during and after the installation to address any remaining questions and concerns you may have
- [Add bullets for any specifics of your program]
- [Link to scheduling form/scheduling service OR embed your form here]

(Accordion for) What Are Heat Pumps?

A heat pump is a super-efficient, economical, and environmentally friendly way to heat and cool your home for year-round comfort. Heat pumps run on electricity but are extremely efficient and affordable to operate because they rely on heat transfer instead of heat generation. This is especially true if you combine heat pumps with appropriate weatherization, such as adding more insulation and sealing drafts. These actions reduce the amount

of hot or cold air that escapes your home. Proper weatherization can significantly reduce the amount of energy your system uses to heat/cool your home, thereby reducing your energy bills. You are already familiar with heat pump technology whether you know it or not! Refrigerators, freezers, and air conditioners are all types of heat pumps that remove heat from the air.

There are two main categories of heat pumps: air source and ground source. Each has strengths and weaknesses.

Air Source Heat Pumps:

An air source heat pump works by extracting heat from the atmosphere. Air source heat pumps can push that heat into or out of your home, even at below-zero temperatures. Modern cold climate models produce plenty of heat, even when outdoor temperatures fall to 5, -5, or even -15 degrees Fahrenheit. During cold months, a heat pump extracts heat from outdoors, concentrates it, and delivers it inside to keep you comfortable all winter. In the summer, a heat pump runs in reverse, pumping heat from inside back outdoors. Heat pumps are efficient because less energy is required to move heat than to generate it. A fossil fuel heating system is 80-90 percent efficient, meaning that 10-20 percent of the fuel that you pay for is wasted. In comparison, an air source heat pump is 200-400 percent efficient, meaning that you produce more hot or cold air than the amount of electricity you consume.

Ground Source Heat Pumps:

A ground source heat pump is a type of heat pump that uses the relatively consistent temperature underground to move heat from the ground into indoor spaces during winter, and from indoor spaces into the ground during the summer. Because the average temperature a few feet underground is around 55 degrees Fahrenheit in the Northeast, ground source systems can effectively heat and cool buildings year-round no matter the temperature outside. In these systems, liquid flows deep into the ground through pipes, often 100-300 feet deep for single-family residential systems or around 500 feet deep for larger systems. While moving underground, the liquid either warms up or cools down depending on the season. It then moves through a heat pump, which extracts heat from the liquid and moves it into the building.

A lot less energy is required to move heat than to create it. A fossil fuel heating system is 80-90 percent efficient, meaning that 10-20 percent of the fuel that you pay for is wasted. On the other hand, a ground source heat pump is 300-500 percent efficient, meaning that you get more hot or cold air out than the amount of electricity you use to make it.

(Accordion for) Available Financial Incentives

You should update this page every six months, as incentives change often. We also recommend avoiding specifying dollar amounts of incentives and instead linking the incentive's website to prevent inaccuracies as incentives change.

These example incentives only apply to Massachusetts municipalities served by investor-owned utilities (Eversource, National Grid, or Unitil). If your municipality is served by a municipal light plant (MLP) or is outside of Massachusetts, then you will need to change the information. Some good places to find incentives available in your area are the Database of State Incentives for Renewables & Efficiency (DSIRE), Rewiring America, or your MLP's website.

Single-Family Incentives

AIR SOURCE HEAT PUMPS – SINGLE-FAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Federal Tax Credit	Tax credit for a percentage of project cost.	**No**
Massachusetts Department of Energy Resources (DOER)	Apply to the Alternative Portfolio Standard (APS) program to start selling Alternative Energy Certificates (AECs) generated by your heat pump.	**No**
Mass Save	Rebate determined by heat pump size.	**No**
Mass Save	Enhanced rebate per heat pump.	**Yes**
Mass Save HEAT Loan	0% financing on heat pump loans through third-party lenders.	**No**
Massachusetts Community Climate Bank	Low interest rates on loans supporting home energy-efficiency improvements.	**Yes**

**Conditions may apply. See links for more details.*

GROUND SOURCE HEAT PUMPS – SINGLE-FAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Federal Tax Credit	Tax credit for a percentage of project cost.	**No**
Massachusetts State Tax Credit	Exemption from state sales tax on heat pump equipment.	**No**
Massachusetts Department of Energy Resources (DOER)	Apply to the Alternative Portfolio Standard (APS) program to start selling Alternative Energy Certificates (AECs) generated by your heat pump.	**No**
Mass Save	Fixed rebate amount per home.	**No**
Mass Save	Enhanced rebate amount per home.	**Yes**
Mass Save HEAT Loan	0% financing on heat pump loans (up to $25,000) through third-party lenders.	**No**
Massachusetts Community Climate Bank	Low interest rates on loans supporting home energy-efficiency improvements.	**Yes**

**Conditions may apply. See links for more details.*

Multifamily Incentives

Air Source Heat Pumps – Multifamily		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Mass Save	Rebate determined by results of mandatory no-cost energy audit.	**No**
Mass Save/LEAN	Full coverage of project costs.	**Yes**
Massachusetts Community Climate Bank	Low interest rates on loans for energy-efficiency improvements for properties with 2-4 units.	**Yes**

**Conditions may apply. See links for more details.*

GROUND SOURCE HEAT PUMPS – MULTIFAMILY		
Incentive Source and Link	**Incentive Details***	**Income Qualified?**
Mass Save	Rebate determined by results of required energy audit.	**No**
Massachusetts Community Climate Bank	Low interest rates on loans for energy-efficiency improvements for properties with 2-4 units.	**Yes**

**Conditions may apply. See links for more details.*

(Outside of Accordion) Meet Your Energy Coaches

Note that this section should appear separately, and not as an accordion.

Having a section that includes names, photos, and possibly bios for the energy coaches can be advantageous, especially if interested parties are able to see that many energy coaches are community members looking to help other residents out. It "humanizes" the whole process.

(Accordion for) FAQs

Q: How would a heat pump decrease my home's energy bills?

A: Heat pumps are more energy efficient than gas/propane/oil/electric resistance heaters, meaning that they can heat/cool your home to the same degree as traditional heaters with less energy input. Heat pumps are so efficient because they move, or "pump," heat instead of generating it. Fossil fuel heating systems are 80-90 percent efficient, meaning that 10-20 percent of the fuel that you pay for is wasted. On the other hand, an air source heat pump is 200-400 percent efficient, and a ground source heat pump can be as much as 500 percent efficient. This means that for every unit of electricity you pay for you get two to five units of heat energy. Combining a heat pump with weatherization upgrades can further reduce your home's energy bills—appropriate weatherization will minimize leakage of conditioned air out of your home, thereby reducing the amount of energy required to heat/cool it to your desired temperature.

Q: Can heat pumps be effective in the summer and the winter?

A:
- *Air Source Heat Pumps*: For air source heat pumps, we recommend purchasing a cold climate heat pump. Cold climate heat pumps are specially designed to heat your home reliably at temperatures as low as -15 degrees Fahrenheit. However, a heat pump's efficiency can drop at extremely low temperatures. Your installer will be able to recommend specific models that are best for your home, but examples of cold climate air source heat pumps can be found on NEEP's Cold Climate Air Source Heat Pump list.
- *Ground Source Heat Pumps*: Even if temperatures above ground are sub-zero or over 100 degrees Fahrenheit, the temperature below ground generally remains consistent (between 40-70 degrees) year-round. Ground source heat pumps can operate even when temperatures above ground are extreme.

Q: What incentives are available for heat pumps?

A: There are many financial incentives available for heat pumps depending on the specifications of your system, your income, and details about your home. See the Financial Incentives page for more information.

Q: Can I install a heat pump if my home doesn't have ductwork?

A:
- *Air Source Heat Pumps:* Yes! Ductless air source heat pumps, often called mini-splits, do not require any pre-existing infrastructure like ducts or radiators. Check with a knowledgeable contractor to learn more about the solutions that will work best for your home and your needs.
- *Ground Source Heat Pumps*: Yes and no; ductwork is the most common distribution method for ground source heat pumps. However, there are some ground source heat pump configurations that do not require ductwork and instead utilize low-heat radiators and radiant flooring systems. Ground source heat pumps are NOT a drop-in solution for forced hot water systems and will require new radiators that operate at lower temperatures. Check with a knowledgeable contractor to learn more about the solutions that will work best for your home and your needs. Some manufacturers are beginning to produce ground source heat pumps with distribution through ductless wall units, similar to ductless air source heat pumps.

Q: Can I still use my existing heating or cooling system if I install a heat pump?

A: Yes, both ducted and ductless systems can be installed in configurations that allow for the use of the existing HVAC system. Please note that some incentives may require decommissioning your old system.

Q: When is a good time to replace my home's heating/cooling system with a heat pump?

A: The best time to get a heat pump is when your existing HVAC system is nearing the end of its life but before it fails. The average lifespan of an HVAC system is 15-20 years.

As summers get warmer, it could make sense to install a heat pump for its cooling capacity, especially if your home does not have central air conditioning.

Q: What are the drawbacks of heat pumps?

A:
- Heat pumps are initially more expensive than fossil fuel systems. Depending on local utility rates, they can pay for themselves and lead to cost savings over time, but this can take many years. This is particularly true of ground source heat pumps, which involve a significant initial investment.
- Operating costs are not always clear and are largely affected by your gas and electric utility rates.

Operating costs also depend on your home's weatherization, insulation, and air sealing.

- Air source heat pumps require equipment to be placed outdoors, which may have aesthetic impacts on your building. Not everyone likes the look of indoor ductless heat pump heads.
- Air source heat pumps can produce heat at temperatures as low as -15 degrees Fahrenheit; however, they begin to lose capacity below five degrees and become less efficient as the outdoor temperature drops.

Q: Are heat pumps loud?

A: No! Both ground source and air source heat pumps make less or about the same noise as a typical central air conditioning system or a refrigerator.

Q: How much disruption to my home will installing a heat pump cause?

A:
- *Air Source Heat Pumps*: Installing a single-zone air source heat pump like a ductless mini-split is an uncomplicated process that can be completed in less than a day without much disruption to your space. If you are installing a multi-zone or ducted heat pump, construction can take a few days.
  The installation process can also take longer if your electric supply panel is at capacity or if your electrical panel needs upgrading to support your heat pump. Your installer should be able to tell you if you need an additional subpanel for your circuit breaker or an electrical service upgrade.
- *Ground Source Heat Pumps:* Ground source heat pumps can take 2-3 months to install and involve a higher level of disruption because the system design is complex and requires drilling bore holes and installing pipes below the ground. For this reason, we do not recommend installing ground source heat pumps if you are currently without functioning HVAC or if you are on an accelerated timeline.

Q: How long will my heat pump last?

A:
- *Air Source Heat Pumps*: Air source heat pumps usually last about 15 years, which is similar to the lifespan of a traditional central air conditioning system or a furnace (15-20 years).
- *Ground Source Heat Pumps*: The ground loop portion of a ground source system can last for over 50 years, but the indoor heat pump will last for about 15-20 years.

Q: What maintenance does a heat pump need and how much does it cost?

A:
- *Air Source Heat Pumps: Annual maintenance for an air source heat pump costs about as much as annual* maintenance for a furnace. Although it's best to have a professional inspect your system each year, you can clean the filters on your own. Cleaning the filters every few months can help the system run more efficiently and improve its longevity. Check your filters regularly to make sure the heat pump remains free of any obstacles blocking its vents.
- *Ground Source Heat Pumps*: Ground source heat pumps require very little maintenance, although they do need regular checkups and filter changes.

Q: Can I install a heat pump in an older building?

A: Yes, but your installer may recommend some repairs to your home before installing the system. Many older buildings require weatherization upgrades such as insulation or air sealing to prevent conditioned air from escaping your home. This will help your system run more efficiently so you can optimize your savings and

maximize system longevity. Ducted or compact ducted heat pump systems are a better choice for older homes that have lots of small rooms. This is because an indoor ductless unit will produce too much heat/cooling for a small space while a ducted unit can better distribute small heat loads. Ductless units work best in large rooms or open concept buildings.

Q: What if I want to install a ground source heat pump but I don't have much outdoor space?

A: Ground source heat pumps will not take up yard space, as they are constructed underground. Your installer will be able to assess the best placement and configuration of a ground source heat pump at your home.

Q: Is there a way to hide my heat pump if I don't like how it looks?

A: Yes—your installer can help make it more visually appealing. You can hide an outdoor unit with shrubs, a fence, a privacy screen, or other solutions as long as you allow for proper ventilation. It's a good idea to leave some space around the heat pump to allow air to flow in and out of it.

Indoors, you could install ceiling units that are almost flush with the ceiling. If you opt for the more traditional upper wall or lower wall units, then you can conceal them with hanging plants or a decorative cover, or place them in a less visible recess. Avoid using any moisture-sensitive items to cover the units, and don't cover the vents or place anything on top of the unit. Ensure that any covers are easily removable in case you need to access the unit for repairs or maintenance.

Q: Do I need to be careful of frost and snow?

A: Outdoor air source heat pump units are typically installed on stands above the ground to avoid blocking the vents with accumulated snow. In heavy snowstorms, keeping an eye on the system and making sure snowbanks do not pile up around the heat pump is important. Air source heat pumps have a built-in defrost cycle that will melt ice on the outdoor unit. If the system gets overwhelmed with snow or ice, its sensors will automatically shut it down to prevent a safety hazard.

(Outside of Accordion) More Information & Resources

Note that this section should appear separately, and not as an accordion.

Heating, cooling, and hot water from residential buildings account for nearly [X percent] of [municipality name]'s greenhouse gas emissions. By promoting the adoption of efficient heat pump technology, [program name] is working to help our community reduce its greenhouse gas emissions as we move toward [municipal or program-specific decarbonization goal details].

[Hyperlink: City/Town's Climate Action Plan]
[Hyperlink: NEEP ASHP Buying Guide]
[Hyperlink: other resources]
Contact [name of contact person] at [email address] if you have any questions.

Chapter 3 Conclusion

Your website will be your main hub for educational resources and initiating coaching consultations. Depending on your capacity for web development, you can utilize the longer-form website or the shorter webpage. Edit the language to fit your needs.