Maine Home Energy Navigator and Coaching Pilot Program Design Report

Submitted to the Maine Legislature's Joint Standing Committee on Energy, Utilities and Technology

Pursuant to Resolve 2025, Ch. 86

MAINE DEPARTMENT OF Energy Resources

GOVERNOR'S OFFICE OF Policy Innovation and the Future

Prepared by the Maine Department of Energy Resources and the Maine Governor's Office of Policy, Innovation and the Future in consultation with the Maine Office of Community Affairs, Efficiency Maine Trust, and the Maine State Housing Authority

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Acronyms Used in This Report

BPI – Building Performance Institute

CAA – Community Action Agency

CAG – Community Action Grant

CBO – Community-based organization

CRP – Community Resilience Partnership

DOER – Department of Energy Resources (formerly Governor's Energy Office)

EMT – Efficiency Maine Trust

GEO – Governor's Energy Office (now Department of Energy Resources)

GOPIF – Governor's Office of Policy, Innovation and the Future

LIHEAP/HEAP – (Low-Income) Home Energy Assistance Program

LMI – Low- and moderate-income

MOCA – Maine Office of Community Affairs

MSHA – Maine State Housing Authority (MaineHousing)

RFA – Request for Applications

RPO – Regional planning organization

TA – Technical assistance

WAP – Weatherization Assistance Program

Introduction

L.D. 1967, *Resolve, to Design a Maine Home Energy Navigator and Coaching Pilot Program* (the Resolve), was enacted by the Legislature and signed by the Governor in June 2025. This Resolve directed the Governor's Energy Office (GEO, now the Department of Energy Resources) and the Governor's Office of Policy Innovation and the Future (GOPIF) to design a Maine home energy navigator and coaching pilot program ("pilot program") and submit a report to the Committee on Energy, Utilities, and Technology by February 1, 2026. The pilot program must be designed to:

1. Provide community-based energy coaching services to residential consumers (including both homeowners and renters);
2. Provide guidance to residential consumers, particularly those in low-income and underserved communities, to understand and navigate energy efficiency and clean energy investment options to affordably meet their home energy needs;
3. Advise residential consumers on accessing available grants, rebates, financing and other assistance programs and incentives to meet their home energy needs;
4. Assist residential consumers in prioritizing identified energy-saving opportunities, including through the integration of weatherization strategies to reduce heating and cooling loads that could minimize the need for the installation of new equipment and lower future electric demands on the grid;
5. Help residential consumers review and analyze contractor recommendations regarding cost, payment and other relevant factors;
6. Minimize potential liability risks for the pilot program; and
7. Use grant funds and private partnerships to support pilot program implementation.

The Resolve directed the Department of Energy Resources (DOER) and GOPIF to design the pilot program in consultation with the Efficiency Maine Trust (EMT), the Maine State Housing Authority (MSHA) and the Maine Office of Community Affairs (MOCA). DOER and GOPIF were also required to consult with community-based organizations and tribal governments.

Recommended Approach

The following report outlines three options for the Legislature to consider for establishing an energy coaching pilot program for Maine. After extensive stakeholder feedback, DOER and GOPIF identified that Proposal 1 to create an "Energy Coach Pilot Grant Program," would likely have the most significant impact of all three pilot proposals. This approach includes 1) pilot grants to support local energy coaching initiatives, and 2) state level resources and coordination to help reduce the barriers to launching and expanding energy coaching at the local level. Many commenters noted that funding and capacity are needed to sustain and grow local energy coaching initiatives, particularly in underserved communities. Several municipalities have received grants through the Community Resilience Partnership (CRP) to launch energy coaching programs, and the New England Heat Pump Accelerator represents a new opportunity to direct some funding to communities for energy coaching. However, these grant opportunities are limited and competitive. Dedicated pilot funding would provide an opportunity to evaluate new approaches to energy coaching and determine whether energy coaching should be expanded statewide.

In the absence of state funding to support energy coaching pilot grants, Proposal 3, the establishment of a state-maintained energy coaching resource hub, is a low-cost, 'no regrets' strategy that could be pursued with some dedicated staff time and a small amount of additional funding. Proposal 3 would support communities and organizations to establish local energy coaching programs without significant new funding resources. Public comments and stakeholder conversations indicated the need for standardized training materials and resources to support the intensive process of establishing energy coaching programs; they also indicated that there are a growing number of energy coaching programs in Maine and that the state should continue to engage with these programs while developing resources and evaluating success.

A proposed approach to implementing Proposal 3 is outlined below:

- Coordinate with existing energy coaching programs, organizations such as the Northeast Energy Efficiency Partnerships (NEEP), and state partners including EMT, MOCA, and MSHA to develop a centralized resource hub (Proposal 3), largely leveraging existing resources;
- Explore developing and implementing a standardized training curriculum for energy coaches;
- Support the CRP to require communities using Community Action Grant (CAG) funding to support energy coaching programs to utilize the standardized resource hub materials;
- Support communities in applying for New England Heat Pump Accelerator (NEHPA) and other grants to support local or regional energy coaching programs;
- Work with existing energy coaching programs to identify and track priority metrics, to support evaluation of program success; and

- Evaluate the benefits of the implementation of a state-procured customer relationship management (CRM) platform to support energy coaching programs in tracking engagements.

Background and Purpose

Energy coaching and energy navigation are common terms for a variety of program design types that help consumers meet their home energy needs through personalized support. Utilities, nonprofits, and community action agencies (CAA) have long offered coaching and advisory services that help consumers reduce their energy needs through behavioral interventions. Other existing energy coaching and/or navigation programs focus on helping people access rebates and incentives for home energy upgrades such as weatherization, heat pumps, and solar panels. Energy coaching programs can often be a helpful no-cost (to the resident) first step before spending money on upgrades or pursuing a comprehensive energy audit. These programs provide a hands-on approach to walk people through the process of identifying rebates, selecting contractors, and completing the work.

Energy coaching has received significant interest during recent climate and energy planning processes in Maine. Under Objective A, Strategy B of the Maine Energy Plan, DOER recognizes the need to "expand education, outreach, and technical assistance activities to increase access to and utilization of existing energy efficiency, weatherization, and clean energy programs through navigator-type programs and partnerships with other state agencies and community-based organizations." *Maine Won't Wait* (2024), Maine's updated climate action plan, recommends several ways that the state can expand education and outreach to help people take advantage of climate programs and incentives:

- *"Launch an energy coaches program to help low-income and underserved individuals and communities understand their options for meeting their energy needs through grants, rebates, or other incentives."* (Strategy C, recommendation 1)
- *"Partner with community-based organizations to reach underserved individuals and communities to increase awareness about climate programs and opportunities and invite input into the design of programs and policies recommended by Maine Won't Wait."* (Strategy G, recommendation 1)

Existing Programs and Barriers

MSHA, through the state's CAAs, offers a variety of programs to help income-eligible Maine people afford their energy bills, weatherize their homes, and replace outdated heating systems.[1] These programs include the Home Energy Assistance Program (HEAP) to assist with payment of heating bills, the Low-Income Assistance Program (LIAP) to help with payment of electricity bills, the weatherization program to help improve energy efficiency in homes, and the Central Heating Improvement Program (CHIP) to replace or repair central heating systems. While MSHA grants typically cover most or all of the cost of improvements for eligible households, the programs typically experience long wait times due to a high volume of need and limited funding. Eligible customers apply for these programs through their local CAA,

[1] https://www.mainehousing.org/programs-services/energy

and when an individual applies for HEAP they are typically screened for eligibility for other programs that could help lower their energy costs.

EMT offers rebates and incentives for certain efficiency measures including qualifying heat pumps, insulation, and heat pump water heaters, with higher rebates for heat pumps and weatherization available for individuals with low and moderate incomes.[2] In 2025, a low-income household could receive rebates up to $9,000 for heat pumps designed to be used as the only source of heat in the home or up to $3,000 for a supplemental heat pump. Those same households could receive up to $8,000 for air sealing and/or insulation.

Several local, state, and national nonprofits also have programs to help people reduce or afford their energy bills. These include WindowDressers, which provides low-cost or no-cost window inserts;[3] AIO, which provides energy assistance in Knox County;[4] and local Habitat for Humanity programs, which often provide weatherization and home repair services.[5] Maine towns also offer General Assistance to help individuals and families meet their basic needs, including energy costs.[6]

Both EMT and MSHA conduct outreach and engagement to build awareness of their programs among eligible populations. EMT conducts comprehensive statewide outreach through events, web resources, media, training, advertising, and direct customer support. In Fiscal Year 2025, these efforts included event participation, high-traffic online resources, workforce trainings, media engagement, operation of a dedicated call center, and targeted customer education.[7] EMT also relies heavily on contractors and vendors to market its programs. MSHA primarily conducts outreach through the CAAs that administer its assistance programs.[8]

Even with Maine's robust incentives and outreach, experience by those conducting on-the-ground energy outreach suggests that energy program awareness could be expanded through additional engagement with trusted experts. Energy coaching aims to overcome common barriers such as knowledge gaps, digital literacy, and the time it takes to learn about and apply for incentives and assistance programs. Through initial research and discussions with people involved in existing energy coaching programs, state staff identified several barriers faced by specific populations that energy coaching could help to address:

- **Rural populations:** A 2018 report by the Island Institute and the Governor's Energy Office (now DOER), found that in "Maine … the energy burden is 33% higher in rural areas and participation in residential energy efficiency financing and rebate programs can be significantly lower."[9] This "rural

[2] https://www.efficiencymaine.com/at-home/
[3] https://windowdressers.org/
[4] https://www.aiofoodpantry.org/energyassistance
[5] https://www.habitat.org/local/affiliate-by-state?state=ME
[6] https://www.maine.gov/dhhs/ofi/programs-services/general-assistance
[7] https://www.efficiencymaine.com/docs/FY2025-Annual-Report.pdf
[8] https://www.mainehousing.org/programs-services/energy/liheap-agency-contacts
[9] https://www.islandinstitute.org/wp-content/uploads/2019/07/Bridging-the-Rural-Efficiency-Gap-WP-Mar72019-.pdf

energy efficiency gap" is driven by geographic barriers, financial barriers, and awareness and access barriers, including a lack of access to traditional marketing channels, lack of awareness or skepticism of existing resources.

- **New Mainers and non-Native speakers:** The American Council for an Energy Efficient Economy notes that few energy efficiency programs offer program materials, outreach, and support in languages other than English.[10]
- **Older adults:** The 2024 Maine State Plan on Aging Needs Assessment found that older adults can struggle to access information on available services and programs: "When asked how difficult it is to find information about available services and programs … nearly half of survey respondents said they had not tried. Of those who had, 39% said it was somewhat difficult and 9% said it was very difficult."[11] Older adults are less likely to get their information from the internet, one of the primary pathways to access information about energy programs, and may also experience distrust of information coming from governmental entities, contractors, or individuals and organizations that they do not know personally.
- **Addressing time, trust, and knowledge barriers**: EMT, in its Triennial Plan VI, notes that lack of technical expertise and uncertainty about the impact of energy improvements are key market barriers to participation in its residential energy programs.[12] EMT's 2024 Residential Baseline Study notes that individuals with heat pumps are more likely to report that heat pumps are effective for heating and cooling than those without heat pumps, suggesting that there are trust and knowledge gaps about this key technology even though heat pump adoption is increasing.[13]

Energy Coaching in Maine

Several energy coaching programs are currently active at the local level in Maine. York Ready for Climate Action has a volunteer-driven energy coaching program funded in part by a CAG through the state's CRP. Other communities, including Falmouth/Yarmouth, Camden/Rockport, Blue Hill Peninsula Tomorrow, and A Climate to Thrive on Mount Desert Island are in various stages of program development and launch. Historically, the Maine Campus Compact ran an AmeriCorps program where service members hosted at Maine colleges and universities provided energy efficiency education to community members. In 2022, Volunteer Maine awarded a pilot grant to Downeast Community Partners to support four Climate Corps members to provide home energy audits and energy efficiency education to residents in Downeast Maine. Greater Portland Council of Governments and Southern Maine Planning and Development Commission are deploying Resilience Fellows in support of energy coaching through the Southern Maine Energy Navigator Pilot program. In addition, several of Maine's CAAs use Low-Income Home Energy Assistance Program (LIHEAP) funds to offer one-on-one coaching to help low-income households reduce

[10] https://www.aceee.org/sites/default/files/pdfs/B2301.pdf?utm_source=chatgpt.com
[11] https://mainecouncilonaging.org/wp-content/uploads/2024/01/SPOA-Final-Report-FINAL-1_4_24.pdf
[12] https://www.efficiencymaine.com/triennial-plan-vi/
[13] https://www.efficiencymaine.com/docs/Maine_Residential_Baseline_2024.pdf

their energy costs. Finally, many Age-Friendly Communities offer volunteer-based services where trained volunteers perform small home repair and weatherization services and help connect older adults with programs that they may qualify for.

Several comprehensive resources already exist or are in development to help local energy coaching programs start up and scale. Stakeholders have noted that these resources can be helpful in sharing best practices between communities and avoiding duplication of work. Resources available or in development include:

1. NEEP is developing an Energy Coaching Toolkit based on best practices in the Northeast and around the country: https://neep.org/blog/empowering-communities-rise-energy-coaching. The toolkit is geared towards municipalities but could be used by other organizations looking to start coaching programs. NEEP has consulted with several Maine-based organizations during the development of this toolkit.
2. Rewiring America offers an online training program for individuals seeking to become "Electric Coaches": https://www.rewiringamerica.org/go-electric/electric-coaches
3. A Climate to Thrive, through their Local Leads the Way initiative, is developing an Energy Coaching Toolkit for organizations seeking to start or sustain energy coaching programs. The toolkit is being developed through collaboration with other organizations involved with energy coaching programs.

Based on feedback from organizers, energy coaching programs throughout Maine have indicated early success, with program administrators reporting engagement and positive feedback from participants. However, most programs are still in their beginning stages. The proposals in this report aim to build on the work done to date and outline different approaches to energy coaching across diverse Maine communities. If enacted and funded, a state pilot would also provide the opportunity to gather the first set of consistent metrics on program success to gauge whether and how these programs are helping people to affordably meet their home energy needs.

Pilot Proposal Development Process

Following the passage of L.D. 1967 in the summer of 2025, DOER and GOPIF engaged with EMT, MSHA, and MOCA and conducted outreach with broader stakeholders to inform this report. During this process, DOER and GOPIF conducted more than 15 meetings with individuals and groups involved with energy coaching, energy efficiency, or energy assistance programs. A summary of this engagement is included in Appendix A. General themes from these conversations are described below.

Across these conversations, many people noted the robust energy coaching activity that exists throughout Maine at the local level. From York to Presque Isle, organizations, tribes, and municipalities are responding to the need for people to understand their options to address the major challenges posed by high energy costs and inefficient homes. Many local energy coaching initiatives collaborate and learn from each other through forums such as Local Leads the Way and the Maine community-led Energy & Climate Action Network (MaineCAN).

Administrators of existing energy coaching programs noted that their programs are designed to address specific local needs, and that future state-level support should allow flexibility to continue to meet those needs in a tailored way. Each community is different, and the strategies that work in southern or coastal Maine may not work in northern Maine or in tribal nations.

When asked what model for a statewide energy coaching pilot would best serve the needs of their communities, participants generally felt that state-level support would be helpful at any magnitude. The greatest needs expressed were for funding and capacity at the local or regional level. Many expressed challenges in retaining volunteers and ensuring continuity of a program without a long-term funding source. Participants noted the importance of having energy coaches that are from the communities they serve and expressed hesitation towards program design models that would bring in volunteer energy coaches who are not from the community.

Representatives from the Wabanaki Nations emphasized the importance of embedding energy coaching in existing tribal housing services, such as LIHEAP. At least one Nation is not able to utilize volunteers due to insurance restrictions, so paid staff capacity is critical. They noted that with much of the housing stock owned by tribal governments, auditing and installing heat pumps in those homes may be a higher priority than individual energy coaching.

Though not within the scope of this Resolve, many people noted that the remaining cost to implement energy upgrades after incentives and the lack of contractor availability are barriers that energy coaching alone cannot address. In particular, the upfront cost of energy upgrades poses a challenge for low- to moderate-income households, and the lack of contractors is most acute in rural areas of the state.

DOER held a public comment period through their website in January 2026. DOER shared a draft of the proposed pilot program design and requested comment on the overall design and the following questions:

1. How might an energy coaching program successfully reach low- and moderate-income and rural households in Maine?
2. How might a Maine energy coaching pilot program measure success?

DOER received 29 public comments, the major themes of which are summarized below.

A number of comments were from members of the public in support of energy coaching and the benefits that it can provide to help people navigate complicated energy-related decisions. A few comments were from communities that are looking to expand their energy coaching initiatives or launch a new program, citing programmatic success or community interest.

To reach low- and moderate-income customers, most commenters emphasized meeting these individuals where they are, particularly through partnerships with organizations with existing relationships and outreach methods (e.g., CAAs, local food banks, churches). A few comments noted the need to provide resources for renters, whose needs they felt were not adequately addressed in the draft proposal. Two comments recommended shifting to an ALICE (Asset Limited, Income Constrained, Employed) framework developed by United Way to define households with low- and moderate-incomes.

Multiple commenters expressed potential concerns with a service corps approach to a state energy coaching program, citing the importance of local energy coaches that are trusted in the community; the resource-intensive nature of training an energy coach (which would need to be repeated every 11 to 22 months for service corps members); and potential difficulty in recruiting corps members to rural areas. Some comments indicated that corps members could add capacity to existing and well-established energy coaching programs.

Several commenters voiced support for the general structure of Proposal 1, indicating it had the most potential to serve the unique needs of communities across the state, but noting the need for additional distinction and clarification around eligibility criteria for Tracks 1 and 2. Some noted that defining programs regionally might not be the most effective distinction, as there are ways (e.g., virtual visits) for well-established programs to support energy coaching in rural locations across the state.

Several commenters supported a centralized energy coaching resource hub in order to reduce the burden for organizations to establish an energy coaching program, ensure access to vetted and up-to-date information, and enhance idea sharing. Some of these comments emphasized the need for a resource hub approach to be accompanied by another pilot program, such as the grant program through Proposal 1, to ensure a more equitable distribution of energy coaching programs across the state. Commenters also indicated that several resource hubs are already in development by nonprofit organizations, and any state resource should avoid duplicative efforts. A few comments noted the need for a standard training curriculum for energy coaches, and provided examples of existing programs (e.g., Building Performance Institute (BPI), Rewiring America) that could meet this need. A couple of comments

noted the potential benefits of a state-procured customer relationship management (CRM) platform to help energy coaching programs effectively track and monitor engagements.

Commenters provided suggestions for additional metrics, the majority of which focused on avoided costs, emissions, or energy use from adopting energy efficiency upgrades. Some comments suggested tracking certain equity metrics, such as households that had previously never accessed a rebate, and metrics associated with energy coaches, such as volunteer turnover.

A number of comments noted the successful role of the Community Resilience Partnership (CRP) in funding energy coaching programs for municipalities and expressed an interest in using the CRP as a framework to fund additional energy coaching programs, such as through a special grant round.

Pilot Program Design Options

To fulfill the requirements of the Resolve, this report includes three potential pilot program approaches which highlight the varying staffing, resource, and budget needs of different pilot program designs. These proposals are presented in order of estimated impact across the state, with Proposal 1 likely to provide the most benefits and Proposal 3 being the lowest cost and likely 'no regrets' opportunity:

1. The first pilot program proposal ("Proposal 1") funds grants to provide three (3) full-time positions at two (2) regional organizations to support energy coaching across multiple communities;
2. The second pilot program proposal ("Proposal 2") trains and places six (6) Climate Corps service members in rural and underserved communities to serve as energy coaches; and
3. The third pilot program proposal ("Proposal 3") creates a "resource hub" housed at DOER to serve as a central repository for energy coaching resources.

	Energy Coach Pilot Grant Program (Proposal 1)	**Climate Corps Pilot Program (Proposal 2)**	**"Resource Hub" Pilot Program (Proposal 3)**
Overview	Establishes two tracks of energy coaching programs and funds one project from each track. Track 1 (to support existing energy coaching programs): funds one (1) energy coach coordinator and provides funding for outreach. Track 2 (to support new energy coaching programs): funds two (2) energy coaches and provides funding for outreach.	Funds a Climate Corps program that places six (6) service members within Maine communities to serve as energy coaches for a one- or two-year term of service.	Creates a central repository for standardized resources and materials to support communities in implementing their own energy coaching programs.
Agency roles	DOER to develop pilot program-specific materials and administer the pilot, with input from other agencies. EMT, MOCA, and MSHA to provide guidance on how to integrate existing program materials into the pilot and provide trainings on relevant programs and offerings.	Volunteer Maine (in MOCA) to manage and recruit service members. DOER and GOPIF to develop pilot program materials and provide technical expertise. EMT, MOCA, and MSHA to provide guidance on how to integrate existing program materials into the pilot and provide trainings on relevant programs and offerings.	DOER to lead the development of standardized pilot program specific materials. EMT, MOCA, and MSHA to provide guidance on how to integrate existing program materials into the pilot.

Staff involvement	Would require additional staff capacity for grant administration.	Would require additional staff capacity for program administration and training of Climate Corps members.	Could be accomplished by reprioritizing existing staff capacity, but would require additional resources to support development of materials.
Potential partners/ applicants	Regional Planning Organizations (RPOs), CAAs, Community-based organizations (CBOs), municipalities, Age-Friendly Communities, Tribal Governments.	CBOs, RPOs, CAAs, Age-Friendly Communities, municipalities, Tribal Governments, state agencies.	CBOs, CAAs, RPOs, Age-Friendly Communities, municipalities, state agencies, Tribal Governments.
Funding	$715,000 for a 2-year pilot. Would require some additional funding for staff time at the state level to support coordination and resource development and maintenance.	$580,000 for a 2-year pilot with 6 members: • Climate Corps positions: $35,000 per member per year. • Program management: $80,000/year. • Some level of state funding for energy-specific coordination, outreach, and training.	Would require between $50,000 and $100,000, based on the scope of the resource hub, for funding for staff time or contractors to support the development and maintenance of resources.
Metrics	Number of households served, number of projects completed, underserved households served, $ per household served, qualitative outcomes.	Number of households served, number of projects completed, underserved households served, $ per household served, qualitative outcomes.	Webpage visits, resource downloads, number of energy coaching programs supported.
Target number of residential customers served	500 projects implemented and 1,800 households engaged.	400 projects implemented and 1,500 households engaged.	N/A (primary users would be partner organizations)

Pilot Proposal Details

[Proposal 1] Energy Coach Pilot Grant Program

Summary: This proposal establishes an energy coaching pilot grant program with two distinct tracks to meet the varying needs of communities across the state. Under this proposal, DOER would, through a Request for Applications (RFA), award two (2) two-year pilot grants to eligible entities seeking to either establish new energy coaching programs or expand existing programs. The total cost of this pilot program is estimated at $715,000 for a two-year pilot with some additional funding for state-level support to coordinate training.

Proposal 1 Pilot Program Design:

This pilot proposal seeks to support both new and existing energy coaching programs by providing capacity and outreach funding at organizations that serve multiple communities. The pilot would provide grants for two (2) projects in two different "tracks".

Track 1 would support **existing** energy coaching programs with additional coordinating capacity and Track 2 would support the establishment of **new** energy coaching programs. Grantees could self-select and apply for either Track 1 or Track 2 based on the activities that the grant would support. The pilot would fund one project from each track. Projects that support new energy coaching initiatives would be eligible to receive a larger grant in recognition that it takes more resources to start a new program in an area that lacks an established volunteer network, program design, and outreach channels.

Track 1

This track seeks to leverage existing, engaged volunteer capacity and provide additional staff capacity to augment these programs. Through this track, grantees would fund an energy coach coordinator who would support 1) existing energy coaching programs and 2) surrounding communities or other communities in the state not already served by an energy coaching program looking to establish new energy coaching programs. Additionally, grantees would receive funding for outreach initiatives to support energy coaching programs; volunteer reimbursements would be an eligible use of those funds.

Maximum grant amount:

- $200,000 for coordinator
- $75,000 for outreach

= $275,000 total for two-year pilot

Track 2

This track provides full-time, paid energy coaches at regional organizations to address the challenges of maintaining trained and engaged volunteers in rural and remote areas of the state.

For regions that do not have existing momentum or established programs, full-time energy coaches would ensure a consistent level of engagement, expertise, and support. Successful applications under this track may explore and introduce pathways for developing a volunteer base to enhance the sustainability of these programs.

Maximum grant amount:

- $400,000 for two coaches
- $20,000 for travel
- $20,000 for outreach and marketing

= $440,000 total for two-year pilot

State Role:

The pilot program would be hosted within DOER, with support from GOPIF and MOCA. Existing DOER staff would be responsible for RFA design and administration and would coordinate the development of training and educational materials and resources. The development of training and materials would further be supported by EMT, MSHA, and other state, quasi-state, non-profit, and private entities. Existing EMT and MSHA resources would be used when referencing their respective programs and incentives. DOER staff would communicate regularly with EMT and MSHA throughout the pilot to ensure the use of up-to-date materials.

Role of Grantees:

- Design and implement an energy coaching program tailored to their communities;
- Recruit, hire, and train program staff to fill the regional energy coach/coordinator position(s);
- With the support of regional partners, conduct outreach to residents, with a focus on low-moderate income (LMI) households; and
- Track participation, demographics served, and program outcomes.

Program Eligibility and Grant Selection

Eligible organizations would include CBOs, municipalities, tribal governments, RPOs, and CAAs. Grantees would serve a minimum number of communities and/or individuals; while encouraged, communities served would not need to be located in the same region. Energy coaching programs in other states have demonstrated the feasibility of virtual energy coaching and this approach allows for grantees to implement programs that benefit from other synergies between communities (e.g., community size).

Grants would be awarded based on:

- Geographic coverage (ensuring statewide reach, especially in rural and underserved areas);
- Proposed impact and measurable outcomes;
- Partnerships with local organizations, businesses, municipalities, and neighboring communities;

- Strategies to reach underserved individuals including low- and moderate-income households, older adults, renters, landlords, and people who speak languages other than English;
- Experience with program implementation;
- Experience coordinating volunteers; and
- Understanding, but not necessarily expertise, of energy efficiency concepts.

Costs and Funding:

Under this proposed program DOER would anticipate making two awards, one around $275,000 (Track 1) and one around $440,000 (Track 2). Some funding would be required to support DOER staff time and for potential contractors to support resource development and training.

Proposal 1 Timeline:

- Year 1: RFA creation, application, selection of grantees, launch of initial grant-funded projects (two-year grants to eligible entities).
- Year 2: Implementation of energy coaching pilot program grants begins.
- Year 3: Pilot program implementation concludes, program evaluation.

[Proposal 2] Climate Corps Pilot Program

Summary: In 2020, Maine *Won't Wait,* the State's Climate Action Plan, recommended creating a Maine Climate Corps for climate-related workforce development.[14] In 2022, the Maine Legislature passed L.D. 1974, creating the Maine Climate Corps. The Maine Climate Corps serves as a network of programs that conduct community service work in eight areas, including energy and housing. Volunteer Maine, the state service commission, supports organizations in the network with training, technical assistance, and program administration.

Under Proposal 2, CBOs, towns, tribes, state agencies, and other eligible entities would apply to host Climate Corps members who would serve as paid energy coaches for a one- or two-year term of service within a community. This approach recognizes that many Maine communities do not have an established volunteer base or nonprofit staff available to train and recruit volunteer energy coaches. Climate Corps members would offer direct energy coaching services to individuals and households in small, rural communities. This proposal seeks to demonstrate the effectiveness of a small "corps" of members that receive standardized training in energy coaching.

Proposal 2 Pilot Program Design

Proposal 2 would fund one full-time staff person at Volunteer Maine to support and administer a Climate Corps energy coaching program, modeled after the Maine Service Fellows program. Volunteer Maine would support a cohort of six service member energy coaches who are hosted by eligible organizations in small, rural communities across Maine. Training would be coordinated by Volunteer Maine staff, with

[14] https://www.maine.gov/future/sites/maine.gov.future/files/inline-files/MaineWontWait_December2020.pdf

guidance from DOER, and delivered by relevant state agencies, organizations, and businesses. Volunteer Maine would provide programmatic management and member oversight, while local organizations would support the members' day-to-day activities, build trust within the community, and provide avenues for member/energy coaches to conduct education and outreach.

Role of Climate Corps Members:

- Provide one-on-one energy coaching services to residents in the communities in which they serve;
- Recruit, train, and manage volunteer energy coaches (if applicable);
- Recruit participants to receive energy coaching services; and
- Collect basic metrics about program participation and client experience throughout the energy coaching process.

Role of Local Organizations:

- Host Climate Corps members for a one- or two-year service term;
- Provide a workspace and a local advisor to guide members' day-to-day activities;
- Support Climate Corps member outreach by leveraging their existing relationships and trust within the community; and
- Provide a small cost-share (e.g., $1,800 per year) for Corps members' professional development training.

Role of Volunteer Maine:

- Provide administrative support for Climate Corps members;
- Track metrics across the pilot program; and
- Develop and coordinate standardized trainings and resources for Climate Corps members in collaboration with DOER, EMT, and MSHA.

Eligible organizations would include CBOs, tribal governments, state agencies, municipalities, RPOs, and CAAs. All applicants would be required to have a physical presence in the community that they are proposing to serve. This could include an office or physical building, or frequent collaboration/partnership with other entities that have a physical location in the community. Note that the Maine Climate Corps does not permit members to replace the work of a full-time staff member at their host organization.

Eligible communities would be in Aroostook, Franklin, Hancock, Knox, Lincoln, Oxford, Piscataquis, Somerset, Waldo, and Washington counties. Towns in Penobscot County that are outside the Greater Bangor region and have populations under 5,000 would also be eligible to participate. These eligibility guidelines are based on the Maine Service Fellows program, which aims to provide support to rural and underserved communities. The eligible counties are defined as "very rural" under the United States Department of Agriculture Rural-Urban Continuum Codes.

Host sites would be selected based on:

- Geographic coverage (ensuring broad coverage, especially in rural and underserved areas);
- Proposed impact and measurable outcomes;
- Ability to support and guide a Climate Corps member, demonstrated through a proposed work plan;
- Partnerships with local organizations, businesses, municipalities, and neighboring communities;
- Strategies to reach underserved individuals including low- and moderate-income households, older adults, renters, landlords, and people who speak languages other than English;
- Experience with program implementation and volunteer management; and
- Understanding, but not necessarily expertise, of energy efficiency.

Costs and Funding:

$580,000 for a 2-year pilot with 6 members

- Climate Corps positions: ~$35,000/member/year (assuming equivalent of $16/hour)
- Program management at Volunteer Maine: ~$80,000/year
- Some additional energy-specific coordination, outreach, and training

Proposal 2 Timeline:

This report proposes a 2-year pilot program:

- Year 1: Host site application, selection of host sites, recruitment of service members, launch of first service terms.
- Year 2: Continuation of first service terms.
- Year 3: Second service terms and program evaluation.

[Proposal 3] "Resource Hub" Pilot Program

Summary: Under Proposal 3, the state would work with organizations that have successfully implemented energy coaching programs in Maine and New England, and are already working to share resources, to develop a resource hub with standardized resources and materials to help guide CBOs, tribal governments, municipalities, RPOs, CAAs, and others to implement their own energy coaching programs. Where possible, Proposal 3 would rely on existing resources developed by key partners including EMT, MOCA, and MSHA, but would require some additional funding to support the development and maintenance of the resource hub. State staff would be responsible for reviewing materials included in the resource hub to ensure they are accurate and up-to-date.

Proposal 3 Pilot Program Design:

DOER, MOCA, and GOPIF, in consultation with entities including EMT, MSHA, CAAs, and existing energy coaching programs in Maine and other states, would develop a "resource hub" webpage for educational

materials designed for energy coaches and program administrators. The resource hub would build on materials already available from EMT, MSHA, and partner organizations and may include outreach materials, training curricula, and program design templates (see "Consideration for All Proposals" for training resources and materials that could be included). The resource hub would also be designed in close coordination with organizations already supporting the development of standardized resources in order to reduce duplicative efforts.

Proposal 3 seeks to leverage existing momentum and interest in energy coaching programs by connecting interested entities with resources and best practices from successful programs. This proposal also aims to reduce the burden placed on local organizations in developing energy coaching programs.

The resource hub would include resources and materials to facilitate the design of energy coaching programs, support the training of energy coaches, support volunteer management, and identify opportunities to secure funding. The hub would be a standalone webpage with educational resources, case studies, and links to external sites. The resource hub would be housed on the DOER website.

Costs and Funding:

A small amount of funding, between $50,000 and $100,000 based on the scope of the resources to be included in the hub, would be leveraged to support state staff time or contractors for the development of specific training materials and to design, host, and maintain the dedicated webpage.

Proposal 3 Program Timeline:

Year 1: Development of centralized resources, engagement with stakeholders.
Year 2: Launch of "resource hub" quarterly evaluation of site metrics and performance with a full review following the end of the second year.

Considerations for All Proposals

Determining Pilot Success

It is essential to clearly define how the success of a pilot program would be measured to determine whether it could, and should, be scaled to other parts of the state. The proposed pilot program would seek to answer the following questions:

- How effective are energy coach programs in driving participation among individuals who would not otherwise take advantage of energy incentives and assistance programs?
- What gaps exist in outreach and access to existing energy programs, and how can energy coaching help to overcome these gaps?
- What is the average cost of energy coach support for a completed home energy project?
- How successful are energy coaches at addressing some of the barriers that specific underserved groups face to accessing energy programs?
- What are the estimated costs to sustain an energy coach program over time?
- How might an energy coach program be scaled to reach more small, low-capacity communities?

Both quantitative and qualitative measures would be used to evaluate the pilot program and determine if it should be expanded to a statewide program.

Quantitative: Each local program/grantee would collect information on the number of participants, home upgrades and/or energy audits completed, and participant demographics. These outcomes would be used to determine the overall program costs per participant and per home upgrade completed.

Proposed metrics to be used for Proposals 1 and 2 are included below. Appendix B includes some metrics from existing energy coaching programs, which were referenced when establishing the proposed metrics below. Stakeholders indicated that many benefits associated with energy coaching are hard to quantify (e.g., increased trust and understanding). Additionally, they noted that it may be difficult to quantify the impact of energy coaching on individual decision making because of the many other factors (e.g., rebates) that may influence a homeowner's energy decision. The aim of the metrics below is to provide a picture of overall impact while accounting for outcomes that are hard to quantify.

- Number of households served (e.g., engagements with energy coaches);
- Number of projects implemented, with a goal of 33% of engaged households completing at least one identified upgrade;
- Underserved households served, with a goal of 25% of projects in LMI households;
- Program cost per household served and per project completed; and
- Number of volunteers/volunteer hours leveraged.

DOER and GOPIF would continue to evaluate what metrics best communicate programmatic impact. Proposed metrics are designed to limit the amount of administrative work that volunteer coaches would

need to perform and recognize that some metrics (e.g., cost, energy, emissions reductions) are already tracked by EMT and other program administrators. While likely outside of the timeframe of a pilot program, EMT program data could be used to determine whether towns or ZIP codes with energy coaching programs experience an uptick in program participation in the years after an energy coaching program is established.

This report proposes a different set of metrics to evaluate Proposal 3, as the resource hub model does not fund the creation of energy coaching programs. Key metrics for this program would include:

- Webpage visits;
- Resource downloads; and
- Number of energy coaching programs supported, tracked through interviews and engagement with programs across the state.

Qualitative: Each local program/grantee would conduct exit interviews or surveys with program participants to understand the barriers that they faced prior to participation and how energy coaching may have helped to lessen those barriers. Where applicable, interviewers would gather information about participants' comfort and understanding of how to use heat pumps, heat pump water heaters, and other energy efficiency and/or clean energy technologies to gauge the effectiveness of coaching in promoting beneficial use of these technologies. Exit interviews would also seek to identify how important energy coaching was in implementing a home energy upgrade.

Program Evaluation: The group of agencies (DOER, GOPIF, MOCA, EMT, MSHA) that developed this proposal would meet twice a year throughout the pilot period to receive progress updates. At the end of the pilot, the group would meet to review indicators of program success and determine whether to recommend (and how to fund) an expanded program.

Liability and Risk Reduction

There is risk involved in programs where volunteers provide advice about home upgrades and enter people's homes and it would be important for a pilot program to employ strategies to minimize these risks to the program and to participants. To help manage liability and minimize risk, the pilot program may employ several strategies, such as:

- Requiring that organizations who receive grants to run local energy coaching programs have insurance that covers volunteer activity;
- Clearly delineating the work of volunteer energy coaches as compared to paid, professional experts (such as contractors and energy auditors) and outlining how differences in opinion between energy coaches, community organizations, and vendors would be resolved (see "Role of Energy Coaches" below);
- Requiring appropriate liability waivers to be signed by program participants; and

- Identifying multiple qualified contractors and advising residents to obtain price quotes from multiple contractors, if applicable.

Role of Energy Coaches

As mentioned above, to address potential liability risks, it is essential to have clear guidelines around the responsibilities and duties of energy coaches. DOER and state-level administrators would develop waivers and other guidance materials that clearly outline the support that energy coaches can offer. Generally, energy coaches should:

- Provide energy coaching services to support residents in identifying potential energy efficiency upgrades and relevant programs and incentives;
    - Advise residential consumers on accessing available grants, rebates, financing, and other assistance programs and incentives to meet their home energy needs;
    - Identify the resident's current energy status, including the existing heating and cooling system(s), weatherization, lighting, appliances, and average bill amount(s);
    - Advocate for and help prioritize potential upgrades to improve efficiency and lower energy costs;
    - Help residents to identify qualified contractors and review and analyze contractor recommendations regarding cost, payment, and other relevant factors;
    - Encourage homeowners to seek price quotes from multiple, qualified contractors, as applicable;
    - Provide residents with information about the expected energy bill impacts associated with potential home upgrades, their options related to sequencing, and factors that may aid in decision making; and
    - Follow up with participants who install heat pumps, heat pump water heaters, and other efficient appliances to ensure they are using them correctly and are receiving the benefits.
- Hold an introductory call or meeting with residents, which may include a walk-through of the residence;
- Not directly perform energy upgrades within homes;
- Clearly identify that they are not experts, but they can provide general advice; and
- Defer to qualified professionals for specific advice about home upgrades.

Training and Materials

Through conversations with administrators of existing energy coach programs, three distinct categories of resources and training materials were identified: 1) materials specific to energy coaching program administration (e.g., program design templates, liability forms, metric tracking resources, marketing and outreach materials), 2) training materials related to energy efficiency and clean energy concepts (e.g., heat pump and weatherization basics, available rebates and incentives), and 3) training materials related to client engagement skills development. While Proposal 3 would expressly create a resource hub, all of

the pilot proposals would involve the dissemination of standardized resources. When applicable, EMT, MOCA, and MSHA would provide trainings on their respective program offerings and educational materials.

Standardized training would ensure that consistent information is being shared by energy coaches across the state. Robust training for energy coaches can enhance workforce development initiatives by introducing individuals to foundational energy concepts and continued training opportunities.

DOER and GOPIF would continue to engage with communities and organizations engaged in energy coaching to refine content for a resource hub. Suggested components of a state energy coaching resource hub hosted by DOER include:

1. Energy coaching program materials

As identified in the background materials, external partners have already begun consolidating and sharing resources and best practices. DOER, GOPIF, and state entities would, where appropriate, work through these existing forums to support the development or adaptation of standardized materials to support energy coaching programs. These may include:

- Energy coaching toolkits developed by external partners, such as NEEP and A Climate to Thrive;
- Energy coach scripts, actionable decision trees, and other tools to support energy coaches in effectively engaging with residents;
- Standard metrics for programs to track in order to consolidate the statewide impacts of energy coaching programs;
- Case study examples of successful energy coaching programs;
- A volunteer management toolkit with best practices to support high levels of volunteer management and retention;
- Boilerplate legal disclaimers and other resources to address potential liability concerns; and
- Marketing material templates to recruit and retain volunteers and engage community members.

2. Energy efficiency and clean energy training materials

EMT is Maine's primary resource for energy efficiency information and incentives. Training materials would rely on existing materials; when necessary, existing materials may be adapted or new materials developed to support the specific needs of an energy coaching program. Examples of existing and potential new materials include:

- Links to program webpages, such as EMT and MSHA offerings;
- Educational brochures about EMT incentives, MSHA, and CAA offerings;
- EMT educational brochures and online resources about energy efficiency tips and best practices;
- Energy efficiency upgrade and home walkthrough checklists;

- Information from Maine state agencies, such as the Office of the Public Advocate and DOER, about clean energy options;
- Basic building science information, including home electrification considerations;
- Renter-specific information, including renter's rights and landlord guides to energy efficiency;
- Information relating to effectively evaluating contractor's quotes; and
- Foundations of electricity and heating fuel bills, and actions that impact home energy expenses.

3. Client engagement training materials

Stakeholders noted that the ability of energy coaches to effectively engage with clients can be just as important as knowledge about energy topics. Multiple stakeholders recommended incorporating "customer service" or client engagement training into an energy coach curriculum. Training curricula would include resources related to:

- Effectively engaging with residents and providing customer support;
- Recruiting, coordinating, and retaining volunteers; and
- Addressing potential liability concerns.

Potential Funding Sources

Several funding opportunities are available to help communities establish energy coaching programs. The CRP has funded several municipal energy coaching programs to date; the New England Heat Pump Accelerator Community Grants will provide an additional opportunity to establish energy coaching programs.

- Community Resilience Partnership: CAG funding continues to support municipal energy coaching as an approved activity for no-match grant funds. Communities enrolled in the partnership can apply for up to $75,000, and multiple communities can submit joint applications for up to $175,000.
- New England Heat Pump Accelerator Community Grants: The New England Heat Pump Accelerator (Accelerator) is a multi-state effort to accelerate the adoption of cold-climate heat pump technology across New England. The Accelerator coalition was awarded a $450 million grant from the U.S. Environmental Protection Agency (EPA) Climate Pollution Reduction Grant Program in July 2024. A portion of that grant will be used to award smaller grants for community-based projects beginning in mid-2026. Organizations that are seeking to establish local energy coaching programs may be eligible to apply for these grants, pending final program design details from the Accelerator coalition.
- Private philanthropy: Private philanthropy in Maine has supported numerous initiatives that strategically deploy resources to advance Maine's climate goals. Philanthropy could augment state or other funding to extend the reach of a state energy coaching pilot.

Appendix A: Summary of stakeholder discussions

Event/Venue	Organizations Represented	Themes
Local Leads the Way – Energy Coaching Monthly Call	passivehausMAINE, Bath Climate Action Commission, Blue Hill Peninsula Tomorrow, A Climate to Thrive, CamdenCAN, South Portland, York Ready for Climate Action, Camden/Rockport Energy Coaching Program	• Additional capacity, and funding for that capacity, is essential to address admin burden. • Outreach to get residents interested is a substantial challenge → need trusted partners to build trust for these programs. • "Soft science" is important for trainings as well. • Energy coaching "needs to be a local person," regional scale is likely the most efficient. • State affiliation of a coach could be challenging, need to build trust and not create the perception of the coach benefiting. • Gap funding is critical.
Community Resilience Partnership Regional Coordinators Meeting	MCOG, AVCOG, LCRPC, GPCOG, HCPC, NMDC, EMDC, SMPDC	• Additional capacity, and funding for that capacity, is essential. • Sustainability of programs without a strong existing volunteer base is difficult (e.g., Bucksport unsure of how they could do a program without a Fellow). • Regional pilot would be the most effective, would need to fund a program coordinator. • Neighbor-to-neighbor is most effective; leverages existing relationships. • Training needs to address customer service in addition to technical expertise.
Maine Climate Council Equity Subcommittee	Resilience Works, L.L.C, AARP Maine, Maine CDC	• Not all communities have a strong organization to support energy coaching work; need to build external (regional) capacity. • Fellows have worked well in some communities to build capacity.
Meetings with CAAs	Aroostook Community Action Program (ACAP), Penquis, York County Community Action Corporation (YCCAC), Waldo Community Action Partners	• ACAP employs a "whole family coaching" program which covers 19 domains (including housing, energy, etc.) and braids 15 funding sources. • All CAAs have contracts for whole family coaching, blending funding to support

		energy education, tools, incentives, and tracking utility bill savings. • YCCAC's revamped energy coaching focuses on utility bills, staff training, and a trust-based, low-pressure approach, especially for older adults. • Lack of gap funding makes energy coaching/outreach challenging. • Could see a state program augmenting existing whole family coaching model. • Sees full-time staff as having the requisite expertise for these conversations; volunteers can support outreach and less complex cases. • Volunteer support has potential but requires strong oversight, training, and trauma-informed practices. • Energy education is needed across income levels, with lighter-touch support for middle-income households. • Additional funding would enable more outreach and more intensive services.
Maine Climate Council Buildings Working Group	passivhausMAINE, Center for an Ecology-Based Economy, Bates College, E4theFuture, MaineCAN, Genesis Community Loan Fund, University of New England, Maine Real Estate & Development Association	• Consider measuring success using energy or cost saved. • Track energy audits in addition to energy upgrade projects completed. • Gauging impact of energy coaching is important, but recognize the difficulty in attributing choices to energy coaching vs. other supports. • Important to strike a balance between top-down and supporting what is already happening at the local level, avoid duplication of efforts. • Opportunities for students to serve as coaches, but recognize that clients may be less receptive to energy advice from a college student/AmeriCorps volunteer. • Council on Aging volunteer Medicare coaches as a successful example.
Conversation with Age-Friendly Communities	Age Friendly Saco, UMaine Center on Aging, Age Friendly Windham, Healthy Peninsula	• Community Connector and Age-Friendly programs vary by community, but many involve going into homes to address safety,

		energy, and basic needs as a "foot in the door" to broader support. • Several communities (e.g., Saco, Windham, Blue Hill Peninsula) do home safety, minor repairs, energy audits, window inserts, and accessibility improvements.
Meetings with members of Wabanaki Sustainable Energy Teams	Mi'kmaq Nation, Houlton Band of Maliseet Indians, Passamaquoddy Tribe and Penobscot Nation	• Capacity and funding for physical upgrades and energy audits are the largest needs. • Tribes prefer an allocation rather than competing with other communities for funding. • Energy coaches could work with tribal resilience coordinators, if awarded. • Having one coordinator serving all nations would be challenging; there should be some coaching capacity within each nation. • Ability to use volunteers may be limited due to insurance, capacity, and service program requirements (for Americorps programs).

Appendix B: Summary of Outcomes of Existing Energy Coaching Programs

Program	Description	Outcomes	Funding
Mass CEC	Program from 2018-2020 that awarded funds to 10 projects that served 15 communities to implement volunteer-based energy coaching programs.	4,053 inquiries, 2,004 site visits by installers, and 744 projects implemented.	$940,000 in total funds awarded across 10 projects.
HeatSmart Alliance	Network of 24 cities and towns across Massachusetts with over 60 volunteer energy coaches.	In 2024, the Alliance notes that between 800-1,200 homeowners received heat pump coaching through the 24 member programs. (~42 homeowners reached per program or 17 per coach).	No total funding numbers are included since this is a coalition of 24 independent programs.
Acton, Massachusetts	The program has 13 volunteer clean energy coaches who help residents and building owners through home visits, phone calls and emails. Program is maintained through existing resources.	Across two years, the program saw 211 requests for guidance and ~155 homeowners taking steps towards a clean-energy upgrade (~8 homeowners engaged/volunteer/year).	Program uses existing staff capacity and does not compensate volunteers, making costs low. Total costs over two years (for website and outreach costs): $10,900.
York, Maine	Volunteers visit the homes of neighbors to help them make their homes more energy-efficient and more comfortable while saving money and reducing their carbon footprint.	Two-year goal was 120 engagements, 60 projects, 10 in low-income homes with 7-10 volunteer coaches. After one year, had 86 inquiries, 53 engagements, 24 projects (1 in low-income homes).	$50,000 Community Action Grant.
Southern Maine Energy Navigators	The project will support energy upgrades for low- and moderate-income homes in Kittery, Kennebunk, Wells, Ogunquit, and Kennebunkport. Energy Navigators will also provide guidance in navigating energy incentive programs. This program provides funding for upgrades in LMI households.	Stated targets over 3-year pilot were to support installations in 450 households and providing financial assistance to 300. Note that the financial assistance goal might not be met due to outside program (e.g., WAP) suspension or termination.	$800,000, some portion of this funding supports direct implementation of projects.