


How to Analyze a Bid

Whether you're analyzing a bid from one contractor or comparing several options, a few simple tips can help you know what to look for in a heat pump bid. Use this guide to make sure the bid or estimate matches up with what the contractor has told you during your conversations and assessments.

Some utilities allow participating contractors to pass along incentives directly to customers as an instant rebate, which will show up as a line item on your bid. Ask if utility incentives are included in the bid, or if you will need to apply for them separately. If applied for separately, ask if the contractor can assist you in completing the paperwork correctly.

COMMON ITEMS ON THE BID TO REVIEW:

Look for contractor contact info, including phone and/or email.



Bid

Dan's Awesome DHPs
We install, you enjoy!

Tacoma, WA
253.123.4567
DADHP@email.com

TO Homeowner
Tacoma, WA
253.987.6543
Customer ID No. 1234

INVOICE # 475

 DATE: 1.1.19

Exp: 4.1.19

QTY	DESCRIPTION	UNIT PRICE	LINE TOTAL
1	18k Outdoor compressor, model MVP 123456789	1,600.00	1,600
1	18k Indoor head, model MVPind 987654321	1,300.00	1,300
18	Linear feet lineset cover	25.33	456
	New breaker, wiring, electrical labor	250.00	250
	Pad and 6-inch risers	150.00	150
	Shutoff switch	98.00	98
	Minor trim carpentry	75.00	75
	Permits/fees	100.00	100
SUBTOTAL			4,029
SALES TAX			6.5%
SUBTOTAL			4,290.89
UTILITY REBATE			-350.00
TOTAL			3,940.89

Quotation prepared by: *Jane Estimator*

This is a quotation on the goods named, subject to the conditions noted below: Describe any conditions pertaining to these prices and any additional terms of the agreement. You may want to include contingencies that will affect the quotation.

To accept this quotation, sign here and return:

THANK YOU FOR YOUR BUSINESS!

Make sure the invoice or bid number is printed out for reference.

Ask how long the bid is valid for.

Make sure financing and payment terms are clear and understandable.

Ask clarifying questions about permits, taxes and rebates.

Look for the sales person's name.

Ask for a line-item bid that lists each component cost individually.

Read the fine print. Notes and special clauses could alter price.



ADDITIONAL QUESTIONS TO ASK YOUR CONTRACTOR

- Does the bid include all of the items we discussed in person, on the phone and via email?
- Will you provide answers in writing to all questions (in the bid/estimate, emails, assessment report)?
- What should I expect during the installation?
 - What noise, time, and disruption should I prepare for?
 - Will I need to do any finish painting, trim work, or cleanup?
- Can you explain the system specifications to me?
 - Size of system (ducted vs. ductless vs. partially ducted).
 - Accessories or special features such as a surge protector, wall thermostat or WiFi capability.
 - System efficiency and extended temperature capacity (e.g., HSPF, cold climate capability).
 - Any parts or labor warranties.
- What's it like living with the heat pump?
 - What will the system sound like when it is running?
 - Where will the condensate go?
 - What are my controls options?
 - What kind of maintenance and upkeep will my new system require?

For more information about installing a heat pump heating and cooling system, visit ComfortReadyHome.com/guides/heatpumps

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