

Questions for Contractors as Part of Contract Discussions

Checklist of important questions to ask a contractor

(Source: Northeast Energy Efficiency Partnership Air Source Buying Guide and HeatSmart Alliance)

Articulate Your Goals

It is important to articulate your goals to the contractor so that you receive a quote aligning with your needs. Make sure they understand your motivations (saving money, environmental, etc.), comfort needs, aesthetic preferences, and planned use for the heat pumps.

Sizing and Unit Selection

- *What is the heating and cooling load of my home?* Did you run load calculations (“Manual-J”) to determine the size of the equipment or use rule of thumb? How did you size equipment relative to the heating and cooling loads? What are the heating and cooling loads of my home?

Having this information helps ensure that the equipment is not over or undersized. The importance of having a Manual J load calculation done is indicated below:

Purpose of Heat Pump System	Need for Room-by-Room Manual J
Heat pump intended to heat and cool the whole house upon installation or in the near future.	Critical Required for CMLP Rebate
Heat pump intended to condition 60% - 99% of space in house	Strongly Recommended
Heat pump intended to condition less than 60% of space in house.	Good practice.

- Do you use the [NEEP Sizing and Selecting Guide](#) and [Cold Climate Installation Guide](#) to inform your work?
- Will you choose equipment from the [NEEP cold-climate air source heat pump list](#), and use the information in the listing to help size the system properly?
- Ask for the specific brand and model number of each indoor unit and outdoor unit proposed.

Experience and Knowledge

- Have you participated in manufacturer training for the systems you would install?
- Can you provide references from previous customers with similar systems?

Installation

- What is the typical lead time for you to begin installation after receiving a signed contract? How many days do you anticipate the installation will take for our home?
- Where will you mount the outdoor unit(s), and how?

- Where specifically will the indoor units be placed?
- If exterior “line sets” (piping) will be visible, where will they be placed? Will they be covered? With what?
- Do you recommend a wall-mounted thermostat or control? If so, is it wired or wireless? If wired, where will it be placed?
- What additional home improvements should I be prepared to make to accommodate heat pump equipment? (New electrical panel, pruning or removal of plants, removal of old heating or AC equipment, repair of walls where AC equipment was, etc.)
- What inconveniences should I expect as the work progresses? (Examples: significant noise, unavailability of heating and/or cooling, unavailability of certain rooms for normal use)? What is the recourse in case of project delays?
- Do you always perform a triple evacuation before charging the refrigerant lines?
- Will I need to hire my own electrician to provide the electrical work? Will I need any electrical service upgrade to accommodate the heat pumps?
- Will you use any subcontractors in the process? If so, who are they and what work is subcontracted? Are they licensed/insured/bonded? Do you take full responsibility for the actions/inactions of your Subs? Have you worked successfully with these Subcontractors before?
- What kinds of surprises (good and bad) have your customers had installing heat pumps?
- Will you ensure that your work and the products you install qualify the customer for all rebates and other incentives that are applicable to this project? Have you successfully applied for such rebates and incentives before? If so, when?
- What training will I receive as the homeowner on the operation and maintenance of the system?
 - Will you train on system use as well as the changes that need to be made for seasonal change-over between heating and cooling?

Warranty and Follow-through

- Do you provide a warranty for the systems you install, and how long is it? What does the warranty cover? May I review it?
- What kinds of issues have you had to cover under warranty? Have there been any issues between what the manufacturer will be willing to cover and what the customer wants?

Incentives/Payback

- What incentives can you help me with and what are the estimated amounts?
- Do you handle all of the paperwork and submittals required for any rebates?
- How long has it taken customers with similar homes who’ve installed similar systems to earn back their installation costs through annual savings? (There are many variables such as amount of insulation, shade, etc. that make direct comparisons difficult, but you may get a rough idea).

Additional questions

- Can I/Should I replace my hot water heater with a heat pump water heater?
- Can the system be zoned? How?

- What if I remove my old furnace and just use heat pumps? What are the benefits? Will I need a backup system? If so, will I need to use it often or just in unusual circumstances?