

# HVAC Bid Comparison Checklist

*A starting point from CompareBidsPro*

Use this checklist to see why HVAC bids can be hard to compare before award. It highlights common items that create confusion: missing scope, exclusions, permit responsibility, controls, ductwork, electrical work, warranty language, payment terms, and bidder follow-up questions. The checklist is a starting point. CompareBidsPro provides the full side-by-side bid review and decision-ready report when you want the proposals analyzed for you.

## Before comparing prices

Check	Item	What to look for
<input type="checkbox"/>	<b>Same requested outcome</b>	Are all bidders pricing the same basic project, equipment, location, capacity, and replacement/repair scope?
<input type="checkbox"/>	<b>Complete bid package</b>	Do you have all proposal pages, attachments, terms, exclusions, equipment sheets, addenda, and alternates?
<input type="checkbox"/>	<b>Owner request / RFP</b>	Is there a written baseline to compare against, or are you inferring the scope from the bids?
<input type="checkbox"/>	<b>Comparable pricing basis</b>	Are the bids lump sum, allowance-based, time-and-material, alternates, or mixed?
<input type="checkbox"/>	<b>Missing pages / unclear scans</b>	Could important exclusions, terms, or warranty language be hidden in missing or unreadable pages?

## Scope items that often do not line up

Check	Item	What to look for
<input type="checkbox"/>	<b>Equipment match</b>	Manufacturer, model number, tonnage/capacity, efficiency, refrigerant, accessories, curb/adapter assumptions.
<input type="checkbox"/>	<b>Permits and inspections</b>	Who pulls permits? Who pays fees? Are inspections included?
<input type="checkbox"/>	<b>Controls / BAS / EMS</b>	Is controls integration included, excluded, or by others?
<input type="checkbox"/>	<b>Electrical / disconnect</b>	Does the bid include new disconnects, reconnection, code-required electrical work, or only basic hookup?
<input type="checkbox"/>	<b>Ductwork / curb work</b>	Are supply/return duct modifications, curb review, or curb adaptation included?
<input type="checkbox"/>	<b>Gas / condensate</b>	Are gas piping and condensate reconnects clearly included?
<input type="checkbox"/>	<b>Crane / access / lift</b>	Are crane, delivery, rigging, roof access, traffic control, or special access costs included?
<input type="checkbox"/>	<b>Startup / commissioning</b>	Does the contractor include startup, testing, balancing, commissioning, and closeout documentation?
<input type="checkbox"/>	<b>Removal / disposal</b>	Is removal, disposal, refrigerant recovery, and cleanup included?
<input type="checkbox"/>	<b>Warranty</b>	Compare parts, labor, compressor, registration, exclusions, and duration. Warranty differences can change the value of the bid.

## Commercial terms and risk flags

Check	Item	What to look for
<input type="checkbox"/>	<b>Payment terms</b>	Deposit, progress billing, due dates, retainage, card fees, financing terms, or payment triggers.
<input type="checkbox"/>	<b>Price validity</b>	How long is the quote firm? Are material price increases or freight changes reserved?
<input type="checkbox"/>	<b>Exclusions</b>	Look for broad language such as "anything not listed," overtime excluded, permits excluded, controls by others, asbestos excluded.
<input type="checkbox"/>	<b>Schedule / lead time</b>	Is timing stated clearly? Are equipment lead times, delivery timing, or project duration included?
<input type="checkbox"/>	<b>Tax / freight / bonding</b>	Are sales tax, freight, bonding, permits, and fees included or separate?
<input type="checkbox"/>	<b>Math / totals</b>	Do subtotals, tax, alternates, and totals reconcile? If not, ask the bidder to confirm.
<input type="checkbox"/>	<b>Responsibility gaps</b>	Look for items that each contractor assumes someone else will handle.

## Questions to send back before award

Check	Item	What to look for
<input type="checkbox"/>	<b>Scope confirmation</b>	Please confirm that your price includes all work required to provide a complete operating system for the requested scope.
<input type="checkbox"/>	<b>Permits</b>	Please confirm whether permit pulling, permit fees, and inspections are included or excluded.
<input type="checkbox"/>	<b>Controls</b>	Please confirm whether controls/BAS/EMS integration is included, excluded, or by others.
<input type="checkbox"/>	<b>Electrical</b>	Please confirm whether new disconnects, reconnection, and code-required electrical work are included.
<input type="checkbox"/>	<b>Ductwork / curb</b>	Please confirm whether any duct modifications, curb review, or curb adaptation are included if needed.
<input type="checkbox"/>	<b>Warranty</b>	Please clarify parts, labor, compressor coverage, warranty term, and any warranty-registration requirements.
<input type="checkbox"/>	<b>Payment terms</b>	Please confirm deposit, progress billing, final payment timing, and any payment conditions.
<input type="checkbox"/>	<b>Exclusions</b>	Please confirm whether any exclusions apply beyond those listed in the proposal.

## Decision test

Before award, ask: If a board member, owner, or supervisor asked why one bid was selected over another, could you explain the scope differences clearly? If the answer is no, the bids probably need more clarification before price is used as the deciding factor.

## Need the full review?

CompareBidsPro turns uneven HVAC bids into a clear report showing what each bidder included, excluded, left unclear, or priced differently. Visit [CompareBidsPro.com](https://CompareBidsPro.com) to see a sample report or request an HVAC bid analysis.

**[CompareBidsPro.com](https://CompareBidsPro.com)**