

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
☐	Same requested outcome	Are all bidders pricing the same basic project, equipment, location, capacity, and replacement/repair scope?
☐	Complete bid package	Do you have all proposal pages, attachments, terms, exclusions, equipment sheets, addenda, and alternates?
☐	Owner request / RFP	Is there a written baseline to compare against, or are you inferring the scope from the bids?
☐	Comparable pricing basis	Are the bids lump sum, allowance-based, time-and-material, alternates, or mixed?
☐	Missing pages / unclear scans	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
☐	Equipment match	Manufacturer, model number, tonnage/capacity, efficiency, refrigerant, accessories, curb/adapter assumptions.
☐	Permits and inspections	Who pulls permits? Who pays fees? Are inspections included?
☐	Controls / BAS / EMS	Is controls integration included, excluded, or by others?
☐	Electrical / disconnect	Does the bid include new disconnects, reconnection, code-required electrical work, or only basic hookup?
☐	Ductwork / curb work	Are supply/return duct modifications, curb review, or curb adaptation included?
☐	Gas / condensate	Are gas piping and condensate reconnects clearly included?
☐	Crane / access / lift	Are crane, delivery, rigging, roof access, traffic control, or special access costs included?
☐	Startup / commissioning	Does the contractor include startup, testing, balancing, commissioning, and closeout documentation?
☐	Removal / disposal	Is removal, disposal, refrigerant recovery, and cleanup included?
☐	Warranty	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
☐	Payment terms	Deposit, progress billing, due dates, retainage, card fees, financing terms, or payment triggers.
☐	Price validity	How long is the quote firm? Are material price increases or freight changes reserved?
☐	Exclusions	Look for broad language such as "anything not listed," overtime excluded, permits excluded, controls by others, asbestos excluded.
☐	Schedule / lead time	Is timing stated clearly? Are equipment lead times, delivery timing, or project duration included?
☐	Tax / freight / bonding	Are sales tax, freight, bonding, permits, and fees included or separate?
☐	Math / totals	Do subtotals, tax, alternates, and totals reconcile? If not, ask the bidder to confirm.
☐	Responsibility gaps	Look for items that each contractor assumes someone else will handle.

Questions to send back before award

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

Keep this checklist

Save this checklist for the next time multiple HVAC bids land on your desk. It can help you identify scope differences, exclusions, unclear responsibilities, and questions that should be resolved before selecting a contractor.

When the bids become too lengthy, inconsistent, or time-consuming to compare with confidence, CompareBidsPro can perform the full side-by-side analysis and prepare bidder-specific questions before you make a decision.

See a sample analysis at CompareBidsPro.com.

Know what you're buying. And what you're not buying.