PATTERSON MECHANICAL

Commercial HVAC Maintenance Agreement Scorecard

A side-by-side worksheet for comparing scope, records, response terms and contract conditions.

> Score only what is written in the proposal or agreement. A sales summary, verbal promise or visit count does not replace an equipment schedule and task list.

Property / site _____

Date _____

Proposal A _____

Proposal B _____

Proposal C _____

Scoring

> 0 = missing | 1 = vague | 2 = partly defined | 3 = explicit and property-specific. Add notes for exclusions, assumptions and follow-up questions.

Category	What good looks like	A	B	C	Notes
Asset register	Units, locations, types and asset IDs				
Baseline	Initial condition and known-deficiency process				
Tasks	Equipment-specific inspect / test / clean / replace tasks				
Frequency	Visits and tasks by asset and season				
Consumables	Filters, belts, chemicals and storage responsibility				
Measurements	Required operating readings and test records				
Repairs	Authorization threshold, quotes and temporary repair process				
Response	Hours, contact method, rates, priority and any arrival commitment				
Reports	Per-asset work, findings, photos and unresolved items				
Exclusions	Controls, water treatment, specialty vendors, access and shutdowns				
Contract	Price, term, renewal, cancellation and price changes				

Proposal questions and red flags

Done	Question	Answer / proposal reference
[ ]	Does each covered asset have a unit number and location?	
[ ]	Which tasks occur on each visit and which occur only annually?	
[ ]	Are coil cleaning, filters, belts, chemicals and disposal included?	
[ ]	What readings and evidence appear in the service report?	
[ ]	Are repair labour, parts and after-hours work included or separate?	
[ ]	Does priority service define anything operational?	
[ ]	Who provides access, shutdowns, lifts, escorts and specialty coordination?	
[ ]	How are open deficiencies tracked to repair, defer or capital planning?	
[ ]	Who owns and receives the equipment and service records?	
[ ]	Are renewal, cancellation and price-adjustment terms explicit?	

Decision summary

Highest score _____

Best scope fit _____

Material exclusions _____

Clarifications required _____

Selected proposal / reason _____

Approval / date

The lowest annual price is not automatically the lowest operating risk. Compare the tasks, evidence and response terms attached to each covered asset.