

Commercial HVAC Maintenance Contract 40-Point Evaluation Template

The contract evaluation framework for Birmingham commercial property managers and facility coordinators.

1. Purpose of This Template

Commercial HVAC preventive maintenance contracts vary widely in scope, pricing, and language. This 40-point evaluation template surfaces red-flag contract clauses before you sign, scopes emergency tiers without response-time promises, and aligns contract scope to ASHRAE Standard 180 plus BOMA and IFMA operational reporting. Use this on every new contract and every renewal.

2. Equipment Scope (Points 1-8)

1. Is the equipment inventory named explicitly (make, model, serial, refrigerant type, charge, installation year)?
 2. Is AHRI certification documented for each piece of equipment?
 3. Are common-area / tenant-space equipment boundaries defined clearly?
 4. Is equipment added mid-contract covered under the existing scope or priced separately?
 5. Is equipment retired mid-contract handled with a pro-rata adjustment?
 6. Is refrigerant type documented, and is the charge quantity tracked against the EPA Section 608 threshold?
 7. Is Section 608 leak-rate tracking included in the scope?
 8. Are building automation system (BAS) integration points documented?
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3. Service Frequency (Points 9-14)

9. Does the contract specify visit frequency by equipment type (not a generic "routine visits")?
10. Is the frequency aligned to ASHRAE Standard 180 inspection protocol?
11. Are Birmingham-climate-specific windows addressed (June and September condenser cleaning, September pre-heating-season, January chiller shutdown)?
12. Is quarterly PM specified for heavy-use equipment (office RTU, restaurant refrigeration)?
13. Are chiller monthly operator checks included if applicable?

14. Is annual chiller shutdown-and-teardown scheduled in low-load month?

4. Labor Inclusions (Points 15-22)

- 15. Is filter inspection and replacement included?
 - 16. Coil inspection and cleaning (condenser and evaporator)?
 - 17. Belt inspection and tension/replacement?
 - 18. Bearing lubrication per manufacturer schedule?
 - 19. Refrigerant pressure verification and leak check?
 - 20. Condensate drain line flushing with biocide?
 - 21. Electrical connection torque checks and capacitor testing?
 - 22. Compressor amperage testing (startup and steady-state)?
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5. Parts Inclusions (Points 23-27)

- 23. Is the parts-inclusion list explicit (not "routine parts")?
 - 24. Is a dollar-value or quantity cap specified per visit or annually?
 - 25. Are major components (compressor, condenser coil, chiller compressor rebuilds) explicitly excluded?
 - 26. Is refrigerant top-off covered up to a specified annual pound-count?
 - 27. Are A2L refrigerant handling requirements covered for new (2025+) equipment?
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6. Emergency Response (Points 28-31)

- 28. Is the emergency dispatch tier structure documented (credits, priority routing, or flat-rate)?
 - 29. Is "emergency" defined in contract language (equipment-down-or-at-risk affecting occupied space, food safety, tenant retention, or worker environment)?
 - 30. Is the escalation path specified (who calls whom, documentation requirements)?
 - 31. Does the contract AVOID fixed response-time guarantees? (Fixed response-time guarantees are a red flag — they fail under pressure.)
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7. Contract Terms (Points 32-36)

- 32. Is renewal notice 30 days (not 90-day auto-renewal)?
- 33. Is there an exit trigger tied to documented service failures?
- 34. Is price escalation capped (CPI or a specified annual maximum, typically 3-5%)?

35. Is the liability cap reasonable and with exception for negligence-caused damage?
36. Is invoicing monthly or quarterly (not annual advance payment)?
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8. Documentation (Points 37-40)

37. Does every service ticket document the ASHRAE 180 inspection fields?
38. Is the service ticket format compatible with your property management software (Yardi, AppFolio, RealPage, MRI)?
39. Is BOMA- and IFMA-aligned operational reporting supported?
40. Is HUD REAC inspection protocol supported on subsidized multifamily (where applicable)?
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9. Red-Flag Language to Remove

- Automatic renewal with 90-day notice window
 - "Routine parts included" without explicit list
 - "Emergency" undefined
 - Response-time guarantees (commercial dispatch depends on variables)
 - Unilateral price escalation without cap
 - Exclusive-vendor clauses on portfolio buildings
 - Advance annual payment
 - Liability cap at single month contract value without negligence exception
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10. Sources and References

- ASHRAE Standard 180-2018 — Inspection and Maintenance protocol
 - BOMA International — Operational reporting benchmarks
 - IFMA — Facility management standards
 - ACCA — Commercial HVAC contractor standards
 - U.S. EPA — Section 608 regulations
 - HUD — REAC inspection protocol (multifamily)
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Emergency HVAC Repair Pros — Commercial Division

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