



HVAC Vendor Partnership Scorecard

A Structured Evaluation Tool for Multi-Site Facility Managers Assessing HVAC Service Vendor Quality, Capability, and Partnership Fit

How to Use This Scorecard

This tool helps multi-site facility managers evaluate prospective or current HVAC service vendors across the dimensions that most directly predict service quality, reliability, and long-term partnership value - beyond contract price. Complete one scorecard per vendor under evaluation. Use the scoring summary in Part 3 to compare vendors side by side and to support a selection recommendation to operations or finance leadership grounded in capability evidence rather than bid price alone.

For current vendor evaluations, base scores on documented service history and direct observation. For prospective vendor evaluations, base scores on proposal responses, reference checks, sample documentation reviewed, and pre-award conversations.

PART 1: VENDOR CAPABILITY SCORING

Score each dimension using the scale provided. Record specific evidence for each score - a score without supporting evidence is not useful for comparison or leadership presentation.

Scoring Scale

Score	Definition
4 - Exceeds Standard	Vendor demonstrates capability that goes meaningfully beyond what was asked or expected
3 - Meets Standard	Vendor demonstrates the capability clearly and completely
2 - Partially Meets	Vendor demonstrates the capability but with gaps or limitations that create risk
1 - Does Not Meet	Vendor does not demonstrate this capability or declines to address it
0 - Unable to Assess	Insufficient information available to score - flag for follow-up before award

DIMENSION 1: SCOPE AND SERVICE DELIVERY CAPABILITY

Does this vendor have the technical capability and operational discipline to deliver the service your portfolio requires?

Evaluation Criterion	Score (0-4)	Evidence / Notes
Vendor demonstrates clear understanding of the specific equipment types in your portfolio - not generic HVAC experience only		
Vendor describes PM execution at the task and measurement level - not in general terms		
Vendor addresses pre-season service requirements as a distinct deliverable - not assumed under routine PM visits		
Vendor describes a clear process for identifying and escalating developing equipment conditions between scheduled visits		
Vendor demonstrates capability to service all systems in scope - HVAC, refrigeration, BAS, and other mechanical systems as applicable		
Vendor describes parts inventory maintained for common failure components in the equipment types covered		

Dimension 1 Total: _____ / 24

DIMENSION 2: DOCUMENTATION AND REPORTING QUALITY

Will this vendor produce the service records that make your portfolio manageable and your capital decisions defensible?

Evaluation Criterion	Score (0-4)	Evidence / Notes

Sample service reports reviewed - reports include specific measurements and component findings, not visit confirmation only		
Sample reports document recommendations with priority level and suggested timeline - not observations without action guidance		
Vendor commits to written service report delivery within a defined timeframe after each visit		
Service records are maintained in a format accessible to the facility manager - not stored only in vendor system		
Vendor provides portfolio-level summary reporting across all locations on a defined schedule		
Documentation standard is consistent across technicians and locations - not dependent on individual technician practice		

Dimension 2 Total: _____ / 24

DIMENSION 3: TECHNOLOGY AND MONITORING CAPABILITY

Does this vendor's technology infrastructure support the visibility and proactive service delivery that multi-site operations require?

Evaluation Criterion	Score (0-4)	Evidence / Notes
Vendor operates a service management platform that provides facility manager access to service history across all locations		
Vendor platform supports equipment-level performance data over time - not just point-in-time visit records		
Vendor offers remote monitoring or IoT capability that provides visibility into equipment performance between service visits		
Vendor describes how monitoring alerts are triaged and acted on - and what the facility manager receives when a developing condition is identified		
Vendor platform supports portfolio-level reporting that aggregates condition trends, open deficiencies, and service activity across locations		
Vendor technology integrates or is compatible with facility management systems the operator already uses		

Dimension 3 Total: _____ / 24

DIMENSION 4: RESPONSE TIME AND AVAILABILITY

When something goes wrong, will this vendor respond at the speed your operations require?

Evaluation Criterion	Score (0-4)	Evidence / Notes
Vendor commits to specific emergency response times in writing - not "best efforts" or "as soon as possible"		
Emergency response time commitments are tiered by system criticality - faster response for high-consequence systems		
Vendor confirms technician availability during facility peak operating hours - including evenings and weekends where applicable		
Vendor describes geographic coverage across your portfolio - including secondary market and rural locations		
Vendor describes escalation process when standard response time cannot be met - not just the commitment itself		
References confirm vendor response time performance matches contract commitments under real peak-demand conditions		

Dimension 4 Total: _____ / 24

DIMENSION 5: MULTI-SITE PORTFOLIO MANAGEMENT

Does vendor have the account management structure and operational experience to manage relationship effectively?

Evaluation Criterion	Score (0-4)	Evidence / Notes
Vendor has a dedicated account management structure for multi-site clients - facility manager has a named point of contact for portfolio-level issues		
Vendor describes how service scheduling is coordinated across multiple locations - not managed as independent single-site relationships		
Vendor has documented experience managing portfolios of comparable size and facility type diversity		
Vendor describes process for onboarding new locations added to the portfolio during the contract period		
Vendor provides portfolio-level performance review on a defined schedule - not just location-level service reports		
Vendor describes how they manage technician consistency across locations - same technicians at same locations where possible		

Dimension 5 Total: _____ / 24

DIMENSION 6: PROACTIVE SERVICE AND CAPITAL PLANNING SUPPORT

Does this vendor function as a strategic service partner - or primarily as a reactive repair resource?

Evaluation Criterion	Score (0-4)	Evidence / Notes
Vendor proactively surfaces equipment approaching end of useful life and recommends capital planning timelines - not limited to reactive repair recommendations		
Vendor provides energy efficiency observations and recommendations as part of routine service - not only when specifically requested		
Vendor describes awareness of refrigerant compliance requirements under the EPA AIM Act and how they communicate supply and cost implications to clients		
Vendor demonstrates ability to support internal budget conversations with documented performance evidence - not just invoices		
Vendor references describe proactive communication about developing conditions - facility managers informed before problems affect operations		
Vendor describes how they distinguish between equipment worth continued investment and equipment that should be in the replacement plan		

Dimension 6 Total: _____ / 24

DIMENSION 7: REFERENCES AND TRACK RECORD

Does this vendor's documented history with comparable clients confirm their proposal claims?

Evaluation Criterion	Score (0-4)	Evidence / Notes
References provided are from multi-site operators with comparable portfolio size and facility type - not single-site or dissimilar environment clients		
References confirm documentation quality matches what vendor described in proposal - specific measurements and findings, not visit confirmation only		
References confirm emergency response time performance under real peak-demand conditions - not just general satisfaction		
References confirm vendor proactively identified and communicated developing equipment conditions - not primarily reactive		
References confirm change order frequency was low and scope disputes were minimal - vendor priced the actual work accurately		
References confirm the total cost of the relationship over time was consistent with or better than expectations at contract award		

Dimension 7 Total: _____ / 24

PART 2: SCORING SUMMARY

Transfer dimension totals from Part 1. Calculate weighted scores where applicable.

Dimension	Maximum Score	Your Score	Percentage
1 - Scope and Service Delivery Capability	24		%
2 - Documentation and Reporting Quality	24		%
3 - Technology and Monitoring Capability	24		%
4 - Response Time and Availability	24		%
5 - Multi-Site Portfolio Management	24		%
6 - Proactive Service and Capital Planning Support	24		%
7 - References and Track Record	24		%
Total	168		%

Score Interpretation

Total Score	Interpretation
140-168 (83-100%)	Strong partnership candidate. Vendor demonstrates capability across all dimensions. Proceed to contract negotiation with confidence.
112-139 (67-82%)	Qualified candidate with identified gaps. Review specific low-scoring criteria before award. Address gaps explicitly in contract terms.
84-111 (50-66%)	Significant capability gaps exist. Gaps in high-weight dimensions represent meaningful service delivery risk. Consider whether gaps can be addressed contractually or whether another vendor is a stronger fit.
Below 84 (under 50%)	Vendor does not meet the capability standard for this portfolio. Low score on multiple dimensions indicates structural service delivery risk that contract language alone cannot resolve.

Critical Dimension Flags

Regardless of total score, flag any vendor who scores 1 or 0 on any criterion in the following dimensions for immediate review before proceeding:

- Dimension 2 - Documentation and Reporting Quality: A vendor who cannot demonstrate documentation capability at the pre-award stage will not improve after contract award.
- Dimension 4 - Response Time and Availability: A vendor without specific, written response time commitments is a vendor whose emergency availability is undefined.
- Dimension 7 - References and Track Record: A vendor who cannot provide references from comparable multi-site clients has not demonstrated the portfolio management experience this engagement requires.

PART 3: VENDOR COMPARISON SUMMARY

Complete one row per vendor evaluated. Use for side-by-side comparison and leadership presentation.

Vendor	D1 Score	D2 Score	D3 Score	D4 Score	D5 Score	D6 Score	D7 Score	Total Score	Total %	Critical Flags	Recommendation

Selection Recommendation Summary

Use this section to document your vendor selection recommendation for presentation to operations or finance leadership.

Recommended Vendor: _____

Total Score and Percentage: _____

Key Strengths Supporting Selection:

- _____
- _____
- _____



Key Gaps and How They Will Be Addressed in Contract Terms:

1. _____
2. _____

Basis for Selecting Over Lower-Priced Alternative(s):

PART 4: FOLLOW-UP QUESTIONS FOR LOW-SCORING CRITERIA

Use these questions in pre-award conversations to gather additional information before finalizing scores on criteria where evidence was insufficient.

On Documentation and Reporting

- Can you provide two additional sample service reports from multi-site clients with portfolios similar to ours?
- What is your process when a technician does not complete all required documentation fields at the time of the visit?
- How do you ensure documentation standards are consistent across different technicians servicing our locations?

On Technology and Monitoring

- Can you walk us through what our facility management team would see in your platform on a typical day - not a demo environment, but actual client data?
- What happens when a monitoring alert is generated at one of our locations outside of business hours?
- Which of our specific equipment types are compatible with your remote monitoring capability?

On Response Time and Availability

- What was your average emergency response time across your multi-site client portfolio in the last twelve months - and how do you measure and report that?
- What is your process when a technician is not available within your committed response window?
- How do you handle simultaneous emergency calls across multiple locations in the same market?

On Multi-Site Portfolio Management

- Who specifically would be our named account manager and what is their current portfolio size?
- How do you handle a situation where service quality at one location in our portfolio falls below standard?
- Can you describe how you onboarded your most recent multi-site client of comparable size to ours?

On References

- Can you connect us with the facility manager - not the account manager - at two of your current multi-site clients?
- Are any of your current multi-site clients willing to share their actual service records for a sample location so we can evaluate documentation quality independently?