

Material comparison sheet

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Complete one sheet for each proposed roof system. Ask the bidder to identify the exact product and assembly, then compare your priorities against documented information. Leave unknowns open until answered; do not turn a marketing claim into a verified fact.

01. Property, roof area and decision date

02. Option: product, manufacturer and system

03. Existing roof, slope and deck assumptions

04. Local approval or installer-confirmed suitability

05. Installed scope and quoted total

06. Maintenance tasks, access needs and owner responsibilities

07. Material warranty, workmanship warranty and exclusions

08. Appearance, noise and comfort priorities

09. Evidence still needed and person responsible

10. Decision and reason

Completed example

Illustrative only: Rear roof; Option A is a specified asphalt-shingle system. Proposal A includes tear-off but leaves deck repairs as an allowance. The homeowner prioritizes matching the front roof and clear maintenance instructions. Decision: keep Option A on the shortlist, pending written ventilation details, product identification and a deck-repair unit price. This is a comparison method, not a product recommendation.

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12-point quote checklist

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Ask every bidder to define the same scope in writing. Record the proposal reference on each line; a blank does not mean included. Use one copy per bidder. Compare scope before price.

01. Exact roof areas, slopes, and project boundaries

02. Tear-off, disposal, and number of existing layers

03. Deck inspection and replacement allowance

04. Underlayment and secondary water protection

05. Valley, wall, chimney, skylight, and pipe flashing

06. Drip edge, perimeter metal, and edge securement

07. Intake and exhaust ventilation or assembly strategy

08. Fastening pattern and tested-system compatibility

09. Permits, inspections, product approvals, and closeout

10. Cleanup, magnet sweep, landscaping, and damage responsibility

11. Material and workmanship warranty terms

12. Schedule, weather plan, payments, change orders, and lien releases

Completed example

Example: Bid A identifies the roof areas and tear-off but does not name the flashing scope. Record the relevant proposal sections for answered items. Leave the flashing line unresolved and request a written revision before comparing totals.

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Contractor interview scorecard

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Use the same questions for every contractor. Record evidence and score each answer: 0 = unanswered; 1 = verbal answer only; 2 = written, relevant evidence supplied. A high score does not replace checking credentials and references. Resolve any critical gap before selecting a contractor.

01. Contractor, contact, interview date and proposed crew

02. Applicable license or registration: number and verification source (0-2)

03. Insurance: document, issuer confirmation and expiry (0-2)

04. Similar completed projects and references contacted (0-2)

05. Who supervises, installs and handles subcontractors? (0-2)

06. Written scope, exact products and exclusions (0-2)

07. Deck damage, change-order approval and unit pricing (0-2)

08. Weather protection, property protection and cleanup plan (0-2)

09. Permit, inspection and closeout responsibilities (0-2)

10. Payment milestones and written warranty service process (0-2)

11. Total out of 18; unresolved critical gaps; next action

Completed example

Illustrative only: Contractor A supplies written answers on eight topics; the insurance answer is verbal. Score: 17/18. Two references have been contacted. Critical gap: insurance has not been independently confirmed. Next action: request the relevant certificate and confirm it with the issuer before selection. Do not award the job solely because of the score.

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Apples-to-apples bid worksheet

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Copy this sheet for each bidder. Transfer the same scope into each copy and request written revisions for differences. Record allowances separately from fixed prices. Only add a missing item when its price is confirmed; never treat an unknown as zero.

01. Bidder, proposal date, validity date and revision

02. Exact areas, material/system and tear-off included

03. Deck repair allowance and unit rate

04. Underlayment, flashing and perimeter details

05. Ventilation or assembly approach

06. Permit, disposal, access and property protection

07. Quoted base total and tax treatment

08. Confirmed additions needed for matching scope

09. Confirmed credits for duplicated or removed scope

10. Comparable total = base + confirmed additions - confirmed credits

11. Unknown costs, allowance risks, payment terms and decision

Completed example

Illustrative arithmetic, not market pricing: Bid A base is \$18,000; a written revision adds \$600 for omitted disposal; no credits apply. Comparable total is \$18,600. Bid B is \$18,400 including disposal. Both exclude unforeseen deck repair, so record each unit rate separately. The \$200 difference does not settle the decision: reconcile flashing, warranty, allowances and responsibilities first.

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Final walkthrough and closeout list

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Review from the ground or another safe location with the contractor. Request photographs for roof-level details. Record each unresolved item, its owner and due date; follow the agreed contract process for completion and payment.

01. Project, contractor, walkthrough date and attendees
02. Agreed scope and approved changes reconciled
03. Contractor photos of flashing, penetrations and edges received
04. Ground-level exterior and accessible interior concerns recorded
05. Debris, gutters, magnet sweep and property condition checked
06. Applicable permit/inspection closeout documents received
07. Product identification, invoices and care instructions received
08. Material and workmanship warranty documents and contacts received
09. Registration, transfer and owner maintenance duties explained
10. Open items: description, responsible person and due date
11. Completion confirmation, final documents and agreed next step

Completed example

Illustrative only: The walkthrough identifies debris beside the driveway and a missing warranty registration receipt. Contractor contact: project manager. Agreed actions: cleanup by September 10; registration evidence by September 12. Homeowner confirms completion with photos and retains the written record. No roof access is needed for this walkthrough.

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