Project proposal: resident feedback reporting pilot, Brackenhurst Community Homes

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Project proposal: resident feedback reporting pilot, Brackenhurst Community Homes

Buyer: Brackenhurst Community Homes

Bidder: Larkfield Analytics Ltd

Proposal: Six-month resident feedback reporting project with a four-month pilot decision point.

Status: Brackenhurst Community Homes and Larkfield Analytics are fictional, and this project proposal is a worked example.

Commercial context: £83,130 excluding VAT for the full proposed scope, within the buyer's £90,000 excluding-VAT ceiling.

Proposal validity: 60 days from the date of issue.

> This proposal presents a proposed delivery approach subject to bid-team approval, confirmation of staffing and technical capability, and agreement of the buyer's required approvals and dependencies.

Executive Summary

We propose a six-month project to combine repairs survey and contact-centre feedback into one reporting view for 12 service managers. Subject to confirmation of delivery capability, staffing, source-system access and buyer approvals, we would complete discovery, agree a documented survey and sampling method, establish a reporting store, configure a role-based dashboard, provide monthly narrative reporting, and complete handover.

The contract includes a four-month pilot decision point. At that point, you can review the pilot deliverables, daily refresh operation for the two named source feeds, dashboard filtering by service area, monthly narrative delivery, and readiness for the remaining two months of the six-month contract. The pilot does not establish a measured baseline, target response rate, or guaranteed improvement.

Our proposed approach draws on survey design, data engineering and dashboard delivery methods used in fictional illustrative engagements for local authorities, housing

associations and regional retailers. We would apply those methods only after discovery and your approval of the required design, data-access and governance decisions.

Project Objectives

- Provide one reporting view combining repairs survey and contact-centre feedback.
- Support 12 service managers with role-based dashboard access and filtering by service area.
- Document and obtain approval for a survey and sampling method.
- Configure two named source feeds to refresh daily, subject to source-system access and technical validation.
- Provide one monthly narrative from the assigned survey analyst.
- Enable export of your data at handover.
- Establish a four-month pilot decision point within the six-month contract.

We would use discovery to identify the source-feed names, available fields, data quality, resident contact permissions, reporting definitions, service-area structure, dashboard measures, and any current baseline measures. The brief supplies no measured baseline or target response rate; any proposed measures or pilot outcomes require your approval.

Scope of Work

Included proposed scope

- A two-week discovery covering stakeholder interviews, a data inventory, source-system review, reporting-definition workshop, and a written data protection impact assessment.
- A written survey, sampling and weighting method for your service lead's approval.
- Connection of repairs survey and contact-centre feedback through a scheduled file export, database view or API, subject to technical validation.
- A proposed read-only export build during discovery where a source system offers no standard export or interface.
- One reporting store using a common layout agreed in discovery, supported by a data dictionary that you retain.
- A browser-based, role-based dashboard for 12 service managers, including service-area filtering.
- Proposed daily refresh scheduling for the two named source feeds, subject to source availability, access and technical validation.

- Monthly narrative reporting prepared by the Senior Survey Analyst.
- Two proposed half-day service-manager training sessions: one at launch and one in month six.
- A recorded dashboard walkthrough and data-export handover.

Scope boundaries

- The proposed dashboard-platform licence covers up to 40 named users; the requested 12 service managers are within that capacity.
- Survey fielding is priced for one batch of 1,000 postal and online invitations. Additional invitations require approval and would be priced using the stated per-1,000-invitation rate.
- Paper comment-card digitisation is excluded from the full-scope total. If required, it is priced at £0.85 per card.
- One 90-minute elected-member briefing is available each year, but is not included in the proposed pricing schedule because it is not requested for this six-month project.
- A quarterly written report and presentation to cabinet or board are not included in the proposed pricing schedule because the buyer requests a monthly narrative rather than a quarterly report.
- Agreed travel and out-of-pocket costs are charged at cost only where you agree them in writing in advance.

> To be confirmed: the two named source feeds, source-system access method, data owner, available export or interface, data fields, refresh windows, personal-data content, retention requirements, service-area hierarchy, named-user list and reporting definitions.

Deliverables

Deliverable	Proposed content	Responsible role	Observable acceptance basis
Discovery pack	Stakeholder findings, data inventory, dependency log, proposed reporting definitions and delivery risk register.	Engagement Director	You review the documented findings, dependencies and proposed decisions.
Data protection impact assessment	Written assessment before personal data moves.	Lead Data Engineer	Your authorised representative signs off the assessment before personal-data transfer.

Deliverable	Proposed content	Responsible role	Observable acceptance basis
Survey and sampling method	Written survey, sample design and weighting method.	Senior Survey Analyst	Your service lead approves the sampling method.
Reporting store and data dictionary	Common data layout for the approved source feeds and a data dictionary retained by you.	Lead Data Engineer	Approved feeds load into the agreed layout and the data dictionary is provided.
Role-based dashboard	Dashboard with named-user access and service-area filters for service managers.	Dashboard Developer	Managers can filter by service area; access roles are configured and tested.
Daily refresh configuration	Proposed automated daily refresh schedule for two named feeds.	Lead Data Engineer	The two named source feeds refresh daily, subject to source availability and approved access.
Monthly narratives	One analyst-written narrative each month during the proposed contract period, subject to available refresh data.	Senior Survey Analyst	The analyst delivers one monthly narrative.
Training and handover pack	Two proposed half-day training sessions, recorded walkthrough, data export and handover documentation.	Engagement Director	You can export your data at handover and receive the agreed handover materials.

Project Plan & Milestones

The following is a planning assumption requiring your approval. It is structured to fit the supplied six-month contract period and four-month pilot decision point. Calendar dates depend on an agreed kickoff date.

Timing	Proposed activity and deliverable	Responsible role	Dependency	Observable milestone
Weeks 1-2	Discovery, data inventory, stakeholder interviews, risk register and data protection impact assessment.	Engagement Director and Lead Data Engineer	Kickoff; buyer stakeholder availability; source-owner participation.	You review discovery outputs; personal-data movement awaits your sign-off.
Weeks 2-4	Survey, sampling and weighting method.	Senior Survey Analyst	Discovery findings and your survey decisions.	Your service lead approves the sampling method.

Timing	Proposed activity and deliverable	Responsible role	Dependency	Observable milestone
Weeks 3-8	Reporting-store configuration, data dictionary and feed connection design.	Lead Data Engineer	Approved data access, source extracts or interfaces.	Approved feeds load into the agreed common layout.
Weeks 6-10	Dashboard configuration, role design, accessibility testing and launch training.	Dashboard Developer	Reporting-store data and approved service-area hierarchy.	Service-area filtering and role access are demonstrated.
Months 3-4	Pilot operation, daily-refresh monitoring, monthly narratives and pilot review.	Delivery team	Operational feed access and buyer review participation.	Four-month pilot decision point.
Months 5-6	Remaining contract operation, monthly narratives, final training, data export and handover.	Delivery team	Your decision to continue after the pilot decision point.	You can export your data at handover.

We would deliver through fortnightly sprints, with a written progress report and risk register reviewed at each steering meeting.

Team & Resources

Role	Named resource	Relevant experience and proposed responsibility
Engagement Director	Imogen Farrow	16 years in public-sector research. Proposed to lead the contract, chair governance, manage escalation and sign off reports.
Lead Data Engineer	Dev Okonkwo	11 years building reporting stores. Proposed to lead source integration, reporting-store design and the data protection impact assessment.
Senior Survey Analyst	Sunniva Hale	9 years designing resident and tenant surveys and holds a postgraduate diploma in survey methodology. Proposed to develop the sampling method and write monthly narratives.
Dashboard Developer	Tomasz Wren	7 years building dashboards. Proposed to configure dashboard access, service-area filtering and accessibility testing against WCAG 2.2 level AA.

To be confirmed: bid-team approval and availability of the named delivery team for the proposed contract period.

Relevant illustrative experience

- **Wexcombe District Council, fictional illustrative example:** Larkfield replaced four feedback forms with one survey and a weekly dashboard between 2023 and 2025. The reported response rate moved from 9 percent to 23 percent over 18 months. This is an illustrative example only and does not establish a target or forecast for Brackenhurst. Customer-authorised fictional reference: Corin Aldous, Head of Customer Services, corin.aldous@wexcombe-council.example, 01000 555 0101.
- **Tavistone Housing Association, fictional illustrative example:** Larkfield redesigned an annual tenant survey around required measures and built a quarterly board dashboard in 2024. The first quarterly dashboard reached the board six weeks after contract start. Customer-authorised fictional reference: Maren Ostby, Director of Operations, maren.ostby@tavistone-housing.example, 01000 555 0103.
- **Ardmoor Borough Council, fictional illustrative example:** Larkfield joined three complaints and compliments sources into one dashboard for 14 service managers between 2023 and 2024. The reported median time to produce a quarterly complaints report moved from 11 working days to 3. This measure is not comparable with monthly resident-feedback reporting without discovery. Customer-authorised fictional reference: Elspeth Rowan, Head of Corporate Performance, elspeth.rowan@ardmoor-council.example, 01000 555 0102.
- **Hollin & Rye Stores, fictional illustrative example:** Larkfield connected till, stock and loyalty data and produced a weekly dashboard for each shop manager in 2025. Reported stock-outs moved from an average of 14 per shop per month to 6 within four months. This retailer example illustrates multi-source dashboard delivery only and is not a resident-feedback benchmark. Customer-authorised fictional reference: Perrin Hale, Operations Manager, perrin.hale@hollinrye.example, 01000 555 0104.

Project Governance

We propose a fortnightly delivery sprint, written progress report and maintained risk register. We would review delivery status, dependencies, decisions, data quality, access issues and risks at each steering meeting. Imogen Farrow would be the proposed first escalation contact, followed by Larkfield's managing director.

Proposed data protection, access and resilience controls

- Client data would be hosted in a UK data centre, encrypted at rest and in transit, with named-user access and a quarterly access review.
- We would collect and retain only personal data required for the agreed project purpose.
- We would notify you of a confirmed personal-data breach within 24 hours, stating what happened, affected data known at that time, and actions being taken.

- We propose role profiles for service manager, analyst and administrator access; named-user access would be tested before launch and reviewed quarterly.
- We propose daily encrypted backup copies of the reporting-store data, with Larkfield responsible for operating backup and restore procedures during the contract. We propose one restore test before launch and one at the four-month pilot decision point, with results recorded for your review.
- We would build and test the dashboard against WCAG 2.2 level AA before launch and each major release. Accessibility defects found in testing would be recorded and corrected before go-live.

To be confirmed: platform backup capability, backup retention period, recovery-time objective, recovery-point objective, buyer approval of the proposed restore-test procedure, buyer identity-management requirements, and the security approval required for source access.

Proposed support model

The following support model is an unapproved proposal for agreement and does not represent a confirmed service commitment.

Item	Proposed parameter for agreement
Support period	From dashboard launch through the six-month contract handover.
Coverage hours	09:00-17:00 United Kingdom time, Monday to Friday, excluding public holidays.
Priority 1	Complete dashboard or reporting-store unavailability affecting all users; proposed acknowledgement within 4 business hours and daily updates.
Priority 2	Material degradation affecting a material function or group of users; proposed acknowledgement within 1 business day and updates every 2 business days.
Priority 3	Minor defect, question or enhancement request with a workaround; proposed acknowledgement within 2 business days and update at the next steering meeting.
Escalation	Dashboard Developer or Lead Data Engineer, then Engagement Director, then Larkfield managing director.

To be confirmed: support contact channel, confirmed support staffing, agreed coverage hours, incident-response targets, update targets, out-of-hours requirements and service-level terms.

Compliance matrix

ID	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action and responsible role
BR-01	Six-month project combining repairs survey and contact-centre feedback for 12 service managers.	Proposed	Executive Summary; Scope of Work; Project Plan	Proposed survey, data-engineering and dashboard workflow.	Named feeds, system access and final reporting design.	Lead Data Engineer to validate source connections during discovery.
BR-02	Discovery, documented survey and sampling method, reporting store, role-based dashboard, monthly narrative and handover.	Proposed	Scope of Work; Deliverables	Proposed delivery workflow and named team responsibilities.	Buyer approval of scope design and staffing confirmation.	Engagement Director to obtain kickoff approvals and confirm delivery allocation.
BR-03	Four-month pilot before deciding whether to extend.	Proposed	Executive Summary; Project Plan	Proposed milestone structure within six months.	Decision process and continuation authority.	Engagement Director to agree pilot-review agenda and decision record.
BR-04	Service lead approval of sampling method.	Proposed	Deliverables; Project Plan	Written sampling and weighting method proposed for approval.	Named service lead and approval route.	Senior Survey Analyst to submit method; buyer to identify service lead.

ID	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action and responsible role
BR-05	Two named source feeds refresh daily.	To be confirmed	Scope of Work; Deliverables; Project Governance	Proposed daily-refresh design using export, database view or API.	To be confirmed: the two named source feeds and their supported access and refresh capability.	Lead Data Engineer to validate interfaces and schedule during discovery.
BR-06	Managers can filter by service area.	Proposed	Deliverables; Project Plan	Proposed dashboard configuration and access testing.	Service-area hierarchy and dashboard definitions.	Dashboard Developer to configure after buyer approval.
BR-07	Analyst delivers one monthly narrative.	Proposed	Deliverables; Project Plan	Senior Survey Analyst proposed to write monthly narratives.	Reporting calendar and data-availability cut-off.	Engagement Director to agree reporting calendar with buyer.
BR-08	Buyer can export its data at handover.	Proposed	Deliverables; Scope of Work	Proposed reporting-store handover and data-export workflow.	Export format, transfer method and receiving owner.	Lead Data Engineer to agree export specification during discovery.
BR-09	Data protection and access controls.	Proposed	Project Governance	UK hosting, encryption, named-user access, quarterly access review and data protection impact assessment approach.	Buyer security requirements and approval of access design.	Lead Data Engineer to complete assessment and access-control design.

ID	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action and responsible role
BR-10	£90,000 excluding-VAT ceiling; monthly invoices in arrears payable within 30 days.	Proposed	Pricing; Terms & Conditions	Full-scope total is £83,130 excluding VAT.	VAT treatment and bid-team commercial authorisation.	Engagement Director to secure commercial approval before submission.

Pricing

The proposed pricing structure is time and materials using the stated standard day, monthly platform and per-1,000-invitation rates. The full-scope total covers the six-month contract, including the four-month pilot decision point. It does not create separate pilot or phase pricing.

Line item	Calculation	Amount excluding VAT
Engagement Director	12 days × £1,150 per day	£13,800
Lead Data Engineer	25 days × £950 per day	£23,750
Senior Survey Analyst	24 days × £820 per day	£19,680
Dashboard Developer	20 days × £780 per day	£15,600
Hosting and licence for dashboard platform	6 months × £1,400 per month	£8,400
Survey fielding, postal and online	1 unit of 1,000 invitations × £1,900 per 1,000 invitations	£1,900
Full-scope total	**Six-month project scope**	**£83,130 excluding VAT**

The proposed full-scope total is below the buyer's £90,000 excluding-VAT ceiling. VAT is not included in the stated rates or total.

To be confirmed: VAT applicability and amount, commercial approval of the proposed quantities, any additional survey-fielding volume, any paper comment-card digitisation requirement, agreed expenses, and bid-team authorisation to submit the commercial offer.

Assumptions & Dependencies

- You will provide a nominated service lead, project sponsor, data owners, technical contacts and authorised approver.
- You will provide timely access to the two named source feeds through an agreed scheduled export, database view or API, or authorise development of a read-only export during discovery.
- You will approve the data protection impact assessment before personal data moves.
- You will approve the survey and sampling method before fielding or use.
- You will provide the service-area hierarchy, dashboard definitions, user list and role assignments required for dashboard configuration.
- You will make relevant managers available for proposed launch and month-six training.
- You will review demonstrations and provide written acceptance or list material issues to correct against criteria agreed in discovery.
- You will decide at the four-month pilot decision point whether the project proceeds through the remaining contract period.

To be confirmed: data-retention requirements, lawful basis and contact permissions for survey activity, accessibility requirements beyond WCAG 2.2 level AA, acceptance criteria agreed in discovery, handover export format, buyer security policies, and any required integration, certification or warranty.

Terms & Conditions

- Pricing is stated excluding VAT.
- Invoices will be issued monthly in arrears and are payable within 30 days.
- This proposal is valid for 60 days from the date of issue.
- Expenses are not charged unless you agree them in writing in advance; agreed travel and out-of-pocket costs are charged at cost.
- Governing law is the law of England and Wales, with disputes referred to the courts of England and Wales.
- Larkfield declares that it has not colluded with another bidder, offers no gift or inducement to any buyer officer, accepts the buyer's standard terms and conditions, and lists no clarifications.
- Larkfield holds a current tax clearance certificate and will make its modern slavery statement available on request.

- Larkfield is a registered data controller and processor, holds the fictional Clearfield Data Practice assurance mark renewed in March 2026, and holds public liability insurance of £5 million and professional indemnity insurance of £2 million, both renewed each January.

To be confirmed: legal effect of this proposal, contract commencement date, warranty terms, liability terms, buyer standard terms and conditions version, and submission authorisation.

Acceptance

We propose that we demonstrate each deliverable to your nominated approver. You would confirm acceptance in writing against the criteria agreed in discovery, or identify the material issues we must correct.

For the buyer's stated acceptance requirements, the acceptance record would confirm that your service lead has approved the sampling method; two named source feeds refresh daily; service managers can filter by service area; the analyst has delivered one monthly narrative; and you can export your data at handover.

> **NEXT STEP:**
>
> Please nominate the service lead, project sponsor, data owners and technical contacts; confirm the two named source feeds; approve the proposed kickoff; and provide the outstanding technical, security, commercial and legal confirmations identified in this proposal. Following those confirmations, we can submit the sampling method, data protection impact assessment and detailed implementation design for your approval.