Quote / estimate: tenant survey refresh, Hazelpark Housing Trust

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Header

Buyer: Hazelpark Housing Trust *(fictional buyer)*

Bidder: Larkfield Analytics Ltd *(fictional bidder)*

Document status: This quote is a worked example. Hazelpark Housing Trust, Larkfield Analytics Ltd, all people, requirements and figures are fictional.

We provide this estimate for one tenant survey refresh. The estimate is within the buyer's stated budget range of £14,000 to £16,000 excluding VAT.

TO BE CONFIRMED:

bid-team authorization to issue this estimate and the legal effect of this document.

Relevant illustrative experience

Our fictional, illustrative and unverified experience includes Wexcombe District Council's 2023 to 2025 resident feedback programme, where we replaced four feedback forms with one survey and a weekly dashboard; the response rate rose from 9 percent to 23 percent over 18 months. At Tavistone Housing Association in 2024, we redesigned an annual tenant survey around required measures and delivered a quarterly dashboard to the board six weeks after contract start. These examples inform our proposed survey-design and reporting approach; no dashboard is included in this estimate.

Our fictional, illustrative and unverified Ardmoor Borough Council work joined three complaints and compliments data sources into one dashboard for 14 service managers, reducing the median quarterly-report production time from 11 working days to 3. Our fictional, illustrative and unverified Hollin & Rye Stores work connected till, stock and loyalty data and produced weekly dashboards; reported stock-outs fell from an average of 14 per shop per month to 6 within four months. These dashboard examples are not included in this scope.

Scope of Work

We propose to deliver one 4,000-invitation online tenant survey and one plain-language report. Subject to confirmation of delivery capability, staffing and buyer approval, we will:

- review and refine question wording;
- agree a written sampling and weighting method with you;
- field up to 4,000 online invitations using the invitation list you provide;
- analyse survey responses; and
- prepare one plain-language report.

You will provide the invitation list and approve the final survey questions. We will use these as predecessors to fieldwork.

Exclusions

This estimate excludes a dashboard, postal mailing, translation and a second wave. It also excludes expenses unless you agree them in writing in advance; any agreed travel and out-of-pocket costs would be charged at cost.

Assumptions

- The survey is fielded online only, with no more than 4,000 invitations.
- You provide a usable invitation list in time to support the agreed fieldwork plan.
- You approve final questions before fieldwork begins.
- The proposed allocation is seven Senior Survey Analyst days and one Engagement Director day. This allocation is a pricing assumption for this estimate and is subject to bid-team confirmation.

Deliverables

Deliverable	Proposed content	Dependency	Observable acceptance criterion
Draft questionnaire	Proposed revised question wording for your review.	Kickoff and buyer input.	You can review and approve the proposed final questions.
Sampling and weighting method	Written proposed method agreed during discovery.	Invitation-list information and buyer approval.	The method records the agreed sampling and weighting approach.
Online survey fieldwork	Fielding of up to 4,000 online invitations.	Approved final questions and buyer-provided invitation list.	Fieldwork is completed against the approved questionnaire and invitation volume.
Plain-language report	Analysis of responses and one plain-language report.	Completed fieldwork.	We demonstrate the report to your nominated approver; you confirm acceptance in writing against criteria agreed in discovery, or list material issues for correction.

Pricing

All amounts below are in GBP and exclude VAT. This is an estimate, not a fixed fee.

Item	Quantity	Rate	Calculation	Amount excluding VAT
Online survey fielding	4 units of 1,000 invitations	£1,900 per 1,000 invitations	4 × £1,900	£7,600
Senior Survey Analyst	7 days	£820 per day	7 × £820	£5,740
Engagement Director	1 day	£1,150 per day	1 × £1,150	£1,150
Estimated total			**£7,600 + £5,740 + £1,150**	**£14,490**

The estimated total is £14,490 excluding VAT, leaving £1,510 against the upper end of the stated £16,000 excluding-VAT budget range.

TO BE CONFIRMED:

VAT applicability and VAT amount.

Timeline

The buyer requires a draft questionnaire within two weeks and a final report within eight weeks of kickoff. The following is a planning assumption requiring your approval and confirmation of delivery capability and staffing.

Timing from kickoff	Proposed phase and deliverable	Responsible role	Predecessor or access dependency	Acceptance criterion
Weeks 1-2	Question review, draft questionnaire, and proposed sampling and weighting method.	Senior Survey Analyst; Engagement Director oversight.	Buyer input.	Draft questionnaire available within two weeks of kickoff.
Weeks 3-4	Final-question approval and online fieldwork preparation.	Senior Survey Analyst.	Buyer approval of final questions and invitation list.	Approved questionnaire and invitation list are available for fieldwork.
Weeks 4-6	Online fieldwork for up to 4,000 invitations.	Senior Survey Analyst.	Approved questionnaire and invitation list.	Fieldwork completes against the agreed scope.

Timing from kickoff	Proposed phase and deliverable	Responsible role	Predecessor or access dependency	Acceptance criterion
Weeks 6-8	Response analysis and one plain-language final report.	Senior Survey Analyst; Engagement Director report sign-off.	Completed fieldwork.	Final report is delivered within eight weeks of kickoff and demonstrated to your nominated approver.

Terms

This estimate is valid for **30 days**.

We will invoice monthly in arrears. Invoices are payable within **30 days**.

The proposed governing law is the law of England and Wales, with disputes referred to the courts of England and Wales.

We will not charge expenses unless you agree them in writing in advance. Agreed travel and out-of-pocket costs are charged at cost.

Compliance matrix

Requirement ID	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action and responsible role
HP-01	Single survey refresh: question review, sampling and weighting, online fieldwork, analysis and one plain-language report.	Proposed	Scope of Work; Deliverables	Survey design, fielding, weighting and plain-language reporting approach.	To be confirmed: bid-team authorization and delivery staffing for the proposed scope.	Bid team to authorize the offer and confirm staffing.
HP-02	Field up to 4,000 online invitations.	Proposed	Scope of Work; Pricing	Survey fielding rate of £1,900 per 1,000 invitations.	To be confirmed: buyer-provided invitation list.	Buyer to provide the invitation list; bid team to confirm fielding arrangements.

Requirement ID	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action and responsible role
HP-03	No dashboard, postal mailing, translation or follow-up wave.	Compliant	Scope of Work	Estimate expressly excludes these items.	None.	No action required.
HP-04	Draft questionnaire within two weeks and final report within eight weeks of kickoff.	Proposed	Timeline	Proposed kickoff-relative delivery plan.	To be confirmed: delivery capability and staffing against the proposed schedule.	Bid team to confirm schedule and staffing; buyer to confirm kickoff.
HP-05	Budget range of £14,000 to £16,000 excluding VAT.	Compliant, subject to VAT confirmation	Pricing	Calculated estimate of £14,490 excluding VAT.	To be confirmed: VAT applicability and VAT amount.	Bid team to confirm tax treatment.
HP-06	Quote validity of 30 days and payment monthly in arrears within 30 days.	Compliant	Terms	Quoted commercial terms.	To be confirmed: legal effect of this document.	Bid team to confirm legal effect before issue.

Acceptance

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

To accept this worked-example estimate for review, please confirm the scope, proposed seven Senior Survey Analyst days and one Engagement Director day, kickoff date, invitation-list availability, final-question approval process, VAT treatment and legal effect. Please then sign below.

For Hazelpark Housing Trust *(fictional buyer)*	For Larkfield Analytics Ltd *(fictional bidder)*
Name: To be confirmed **Title:** To be confirmed **Signature:** _____ **Date:** _____	**Name:** Imogen Farrow **Title:** Engagement Director **Signature:** _____ **Date:** _____