Retainer proposal: managed tenant feedback reporting, Ferrybridge Cooperative Homes

November 23, 2026

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Retainer proposal: managed tenant feedback reporting, Ferrybridge Cooperative Homes

Prepared for: Ferrybridge Cooperative Homes

Prepared by: Larkfield Analytics Ltd

Proposal type: 12-month managed-service retainer

> WORKED-EXAMPLE NOTICE:
>
> Ferrybridge Cooperative Homes and all service facts are fictional; this is a worked example. Larkfield Analytics, its people, customers, projects, references and figures are also fictional for this example.

This proposal is valid for **60 days from the date of issue**. Its legal effect is **To be confirmed: legal effect and submission authorization for this proposal.**

Executive Summary

Subject to confirmation of delivery staffing, technical validation and your approval, we propose a 12-month managed-service retainer to keep one resident feedback dashboard current for up to 40 named users. The retainer combines dashboard hosting and licence, two Senior Survey Analyst days each month for data review and narrative reporting, four Engagement Director days across the year for governance, quarterly reviews and a year-end export.

Our proposed approach uses your supplied data feed and online invitation list to maintain a consistent reporting view, provide monthly service reporting and support governance through a named escalation route. The proposed service does not include new integration development, postal survey fielding, 24-hour support or a guaranteed response rate, because these are not requested within the stated scope.

The full-scope price is **£41,080 excluding VAT**, within the stated buyer budget range of £38,000 to £44,000 excluding VAT. The pricing schedule is based on supplied fixed standard rates for the full contract term, including any extension.

We will use discovery to agree the reporting purpose, data layout, dashboard measures, access roles, acceptance criteria and practical arrangements for the supplied feed and invitation list. Any unverified delivery commitment remains subject to bid-team confirmation and your approval.

Service Overview

Subject to technical validation, staffing confirmation and your approval, we propose a managed reporting service covering one browser-based resident feedback dashboard for up to 40 named users over a 12-month term.

Included service component	Included capacity or frequency	Proposed outcome
Dashboard platform hosting and licence	12 monthly platform fees; up to 40 named users	One resident feedback dashboard maintained for named users.
Senior Survey Analyst capacity	Two analyst days monthly; 24 analyst days across the term	Data review, dashboard maintenance within agreed scope, and a monthly narrative summary.
Engagement Director capacity	Four director days annually	Governance, report sign-off and quarterly review support within the included annual capacity.
Quarterly review	One review each quarter	Review of dashboard findings, priorities, risks and agreed actions.
Year-end export	One export at the end of the term	Export of agreed dashboard data and reporting outputs in a format agreed during discovery.

We host client data in a UK data centre, encrypted at rest and in transit, with named-user access and a quarterly access review. We collect and keep only the personal data needed for the agreed project purpose. We will notify you of a confirmed personal-data breach within 24 hours of confirmation, stating what happened, the data affected and the action we are taking at that time.

Dashboards are built and tested against **WCAG 2.2 level AA** before launch and at each major release. We record defects found in testing and fix them before the dashboard goes live.

To be confirmed: the agreed dashboard measures, reporting purpose, data fields, named-user roles, export format and your nominated approver.

Scope of Services

Included delivery approach

Subject to your approval, we propose a two-week discovery period at commencement. This documented approach includes stakeholder interviews, a data inventory and a written data protection impact assessment for your sign-off before any personal data moves.

Subject to technical validation, we propose to receive your one data feed through an agreed scheduled file export, database view or API and load it into a common reporting layout documented in a data dictionary that you retain. No new integration is included or proposed within this retainer.

Subject to approval of the data structure and refresh method, we propose a daily dashboard refresh where the supplied feed supports it. This is a proposed operating parameter, not an unapproved service-level commitment.

Within the included two analyst days each month, and subject to data availability, we propose to:

- Review the supplied feedback data for agreed completeness and quality checks.
- Refresh and maintain the agreed dashboard measures within the existing dashboard scope.
- Prepare a monthly narrative summary of findings, changes, data observations and agreed actions.
- Provide monthly service reporting covering activity completed, capacity used, risks, open decisions, access-review status and planned next steps.
- Maintain a risk register for review at governance meetings.

Within the included four Engagement Director days annually, and subject to prioritisation through governance, we propose to:

- Lead governance and provide senior oversight.
- Sign off reports prepared for the service.
- Support quarterly review meetings.
- Operate the named escalation route within the agreed support model.

Proposed resilience and access controls

Subject to technical validation and your approval, we propose daily encrypted backups of the agreed reporting-store data and dashboard configuration, retained under an agreed schedule. Larkfield Analytics would own execution of the proposed backup and restore procedure; Ferrybridge Cooperative Homes would retain ownership of its source data and the year-end export.

Subject to approval, we propose one restore test during the term, with the result recorded in the monthly service report. The recovery objective, retention period, restoration target and storage architecture are **To be confirmed: backup, restore and recovery requirements.**

Subject to approval, we propose named-user access, role-based permissions, least-privilege configuration, quarterly access review and joiner/mover/leaver changes initiated by your authorised contact. We will test access roles before launch against the agreed user-role matrix. To be confirmed: approved user roles, authorised access-request process and access acceptance criteria.

Exclusions

The following items are outside the included retainer scope:

- New integration development.
- Postal survey fielding.
- 24-hour support.
- Any guaranteed response rate.
- Additional users above 40 named users.
- Work exceeding the included two analyst days monthly or four director days annually.
- Travel and out-of-pocket costs unless agreed by you in writing in advance; agreed costs are charged at cost.

Any additional work, including a change to data sources, dashboard scope, user limit or survey fielding, requires separate written agreement. Survey fielding is priced at £1,900 per 1,000 invitations; paper comment-card scanning and double-keying is priced at £0.85 per card. Neither service is included in the full-scope total.

Service Levels

No buyer service-level targets have been supplied, and we do not propose an unapproved service-level commitment. In particular, 24-hour support is not included.

Subject to bid-team approval and agreement with you, we propose the following support model for inclusion in the service schedule. These are unapproved proposed parameters, not current contractual commitments.

Proposed support element	Unapproved proposed parameter
Support period	Monday to Friday, 09:00 to 17:00 UK time, excluding public holidays in England and Wales.
Priority 1	Complete loss of access to the resident feedback dashboard for all named users.
Priority 2	Material degradation affecting a significant dashboard function or multiple named users.
Priority 3	Individual user issue, data query or non-critical dashboard amendment.
Proposed acknowledgement targets	Priority 1: four working hours; Priority 2: one working day; Priority 3: two working days.
Proposed update targets	Priority 1: each working day until mitigated; Priority 2: every two working days; Priority 3: through the monthly service report or as agreed.
Escalation stages	Service contact, Senior Survey Analyst, Imogen Farrow as Engagement Director, then Larkfield Analytics' managing director.

To be confirmed: support-model authorization, operational support contacts, service-level targets, incident logging process and acceptance of the proposed coverage hours, priorities, acknowledgement targets and update targets.

Governance & Communication

Subject to confirmation of available staff and your governance arrangements, we propose fortnightly delivery sprints during setup and a written progress report with a risk register reviewed at every steering meeting. Following launch, we propose monthly service reporting and quarterly review meetings.

Forum or communication	Proposed cadence	Proposed content	Responsible role
Monthly service report	Monthly	Completed activity, analyst and director capacity used, data-quality observations, access review, risks, decisions, actions and next-month plan.	Senior Survey Analyst, subject to staffing confirmation
Quarterly review	Quarterly	Findings, narrative report, risks, agreed actions and service priorities.	Engagement Director, subject to staffing confirmation
Escalation route	As required	Imogen Farrow, then Larkfield Analytics' managing director.	Engagement Director
Access review	Quarterly	Named-user access and role review against your approved access list.	Proposed joint responsibility

The quarterly written report is delivered within 15 working days of each quarter end. Subject to available director capacity and your request, the Engagement Director can present the quarterly report to your cabinet or board.

We will demonstrate agreed deliverables to your nominated approver. You will confirm acceptance in writing against criteria agreed during discovery, or identify material issues for correction.

Team

Subject to staffing confirmation, we propose the following delivery team.

Person	Role	Relevant documented experience	Proposed responsibility
Imogen Farrow	Engagement Director	16 years in public-sector research; leads contracts and signs off reports.	Governance, escalation and report sign-off.
Dev Okonkwo	Lead Data Engineer	11 years building reporting stores; owns data protection impact assessments for Larkfield projects.	Technical validation and data-protection impact assessment support if required.
Sunniva Hale	Senior Survey Analyst	9 years designing resident and tenant surveys; postgraduate diploma in survey methodology; writes monthly and quarterly narrative summaries.	Data review, narrative reporting and dashboard insight.
Tomasz Wren	Dashboard Developer	7 years building dashboards; owns accessibility testing against WCAG 2.2 level AA.	Dashboard configuration and accessibility testing if required.

Illustrative experience

The following fictional, illustrative and customer-authorized references demonstrate methods relevant to the proposed service. They are not assurances of results for Ferrybridge Cooperative Homes.

- **Wexcombe District Council:** fictional resident feedback programme, 2023 to 2025. We replaced four feedback forms with one survey and a weekly dashboard. The illustrative response rate rose from 9 percent to 23 percent over 18 months. This example informs the proposed approach to consolidated resident feedback reporting; it does not guarantee a response-rate outcome.
- **Tavistone Housing Association:** fictional tenant satisfaction measures project, 2024. We redesigned an annual tenant survey around regulator-required measures and built a quarterly board dashboard. The first quarterly dashboard reached the board six weeks after contract start. This informs the proposed quarterly review and board-reporting approach.
- **Ardmoor Borough Council:** fictional complaints and compliments analytics project, 2023 to 2024. We joined three data sources into one dashboard for 14 service managers. The illustrative median production time for the quarterly report fell from 11 working days to three. This informs the proposed common reporting-layout approach; it does not guarantee a comparable time reduction.
- **Hollin & Rye Stores:** fictional sales-dashboard project, 2025. We connected till, stock and loyalty data and produced a weekly dashboard for each shop manager. This informs the proposed dashboard refresh and named-user reporting model.

To be confirmed: availability of the named proposed team for the commencement period and buyer permission to contact the fictional customer-authorized references.

Monthly Investment

All prices are in pounds sterling and exclude VAT. Rates are fixed for the whole contract term, including any extension.

Line item	Rate × quantity	Total excluding VAT
Hosting and licence for the dashboard platform for up to 40 named users	£1,400 per month × 12 monthly platform fees	£16,800
Senior Survey Analyst included capacity	£820 per day × 24 analyst days	£19,680
Engagement Director included capacity	£1,150 per day × 4 director days	£4,600
Full-scope total	**12 months; two analyst days monthly; four director days annually**	**£41,080 excluding VAT**

The full-scope total is within the buyer budget range of £38,000 to £44,000 excluding VAT. VAT treatment beyond the stated exclusion is **To be confirmed: applicable VAT amount and invoicing treatment.**

We will invoice monthly in arrears, payable within 30 days. No expenses are charged unless you agree them in writing in advance; agreed travel and out-of-pocket costs are charged at cost.

Terms

The service term is **12 months**. This proposal is valid for **60 days from the date of issue**.

Invoices are issued monthly in arrears and are payable within **30 days**. The governing law is the law of **England and Wales**, with disputes referred to the courts of England and Wales.

Larkfield Analytics is a registered data controller and processor. It holds the invented **Clearfield Data Practice** assurance mark, renewed in March 2026. Its public liability insurance is £5 million and its professional indemnity insurance is £2 million, both renewed each January.

Larkfield Analytics declares that it has not colluded with another bidder, offers no gift or inducement to any officer of the buyer, accepts the buyer's standard terms and conditions, lists no clarifications, holds a current tax clearance certificate and will make its modern slavery statement available on request. The declarations are signed for Larkfield by Imogen Farrow, Engagement Director.

To be confirmed: executed contract terms, service acceptance criteria, warranty terms, termination and renewal terms, data-processing documentation, retention requirements, liability terms and proposal submission authorization.

Renewal and handover

Before the end of the 12-month term, subject to your approval, we propose a renewal review covering usage, included-capacity consumption, dashboard scope, named-user access and any required changes. Any extension requires separate written agreement.

If the service ends, subject to agreement of format and lawful data-handling requirements, we propose to provide the included year-end export and support an orderly handover of the agreed data dictionary, dashboard documentation, access list and open-risk record. To be confirmed: handover timetable, recipient, export format, post-termination access period and data-deletion requirements.

Compliance matrix

Identifier	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action	Responsible role
R1	12-month managed service for one resident feedback dashboard	Supported, subject to approval	Executive Summary; Service Overview; Terms	Dashboard hosting, licence and managed reporting approach.	Agreed dashboard scope and acceptance criteria.	Confirm scope during discovery.	Engagement Director
R2	Up to 40 named users	Supported	Service Overview; Monthly Investment	Platform rate expressly covers up to 40 named users.	Named-user list and access roles.	Approve user-role matrix.	Ferrybridge nominated approver
R3	One data feed and online invitation list	Supported, subject to technical validation	Scope of Services	Standard export, database view or API approach; common reporting store.	Feed format, availability and invitation-list process.	Complete data inventory and technical validation.	Lead Data Engineer
R4	Two analyst days each month	Supported	Service Overview; Scope of Services; Monthly Investment	24 Senior Survey Analyst days priced at the supplied day rate.	Monthly priority plan.	Agree monthly work priorities.	Senior Survey Analyst
R5	Four engagement-director days across the year	Supported	Service Overview; Scope of Services; Monthly Investment	Four Engagement Director days priced at the supplied day rate.	Annual allocation of director capacity.	Agree governance calendar.	Engagement Director
R6	One quarterly review	Supported, subject to staffing confirmation	Service Overview; Governance & Communication	Quarterly review workshop and quarterly written-report approach.	Meeting dates and attendees.	Schedule quarterly reviews.	Engagement Director

Identifier	Buyer requirement	Status	Response location	Evidence basis	Remaining gap	Next action	Responsible role
R7	Monthly service reporting	Supported, subject to approval	Scope of Services; Governance & Communication	Monthly narrative-summary capability and proposed service-report contents.	Approved report template and recipients.	Agree reporting template in discovery.	Senior Survey Analyst
R8	Named escalation route	Supported	Service Levels; Governance & Communication	Imogen Farrow, then Larkfield Analytics' managing director.	Operational contact details and support process.	Confirm escalation contact list.	Engagement Director
R9	Clear capacity limits and year-end export	Supported, subject to agreement	Service Overview; Scope of Services; Terms	Stated analyst, director and user limits; included year-end export.	Export format and handover recipient.	Agree export specification.	Engagement Director
R10	No new integration, postal fielding, 24-hour support or guaranteed response rate requested	Compliant	Executive Summary; Scope of Services; Service Levels	These items are expressly excluded from the proposed retainer.	None, unless scope changes.	Record any requested change through written agreement.	Engagement Director
R11	Budget range £38,000 to £44,000 excluding VAT	Supported	Monthly Investment	Full-scope total of £41,080 excluding VAT.	Applicable VAT amount.	Confirm VAT treatment.	Bid team
R12	Monthly invoicing in arrears, payable within 30 days; proposal valid 60 days	Supported	Cover Page; Monthly Investment; Terms	Supplied payment terms and validity period.	Date of issue.	Insert issue date on approved submission.	Bid team

Commencement

Subject to contract execution, staffing confirmation, technical validation and your approval, we propose commencement from an agreed kickoff date. Calendar dates cannot be set until that date is confirmed.

Planning assumption	Proposed activity and deliverable	Dependency	Observable acceptance criterion
Weeks 1-2	Discovery: stakeholder interviews, data inventory, written data protection impact assessment, data dictionary outline and agreed acceptance criteria.	Kickoff, access to relevant stakeholders and source-data information.	Your written sign-off of the data protection impact assessment before personal data moves, plus agreed delivery criteria.
Weeks 3-4	Proposed dashboard configuration, access-role setup, data-feed validation, accessibility testing and launch preparation.	Approved data structure, source-feed access and approved user-role matrix.	Demonstration to your nominated approver; written acceptance or a list of material issues to correct.
Post-launch through month 12	Managed reporting: monthly analyst activity, monthly service reporting, quarterly reviews, director governance and year-end export.	Accepted launch deliverable and continuing availability of the supplied feed.	Monthly reports, quarterly reviews and the agreed year-end export delivered in accordance with the agreed service schedule.

YOUR NEXT STEP:

Please confirm your intention to proceed, nominate a commercial and service approver, provide the proposed kickoff date, and authorize discovery. Our bid team must then confirm delivery staffing, support-model authorization, technical assumptions, VAT treatment, contract terms and submission authorization before acceptance.