

Pergola Site-Measurement & Quotation-Comparison Sheet

A printable worksheet to help you define the job, measure the usable space, compare suppliers on the same scope, and keep planning and installation questions in one place.

1) Project brief

Project detail	Notes
Property / garden location	
Main use (shade / dining / seating / climbers / privacy / rain cover)	
Freestanding or attached?	
Open / slatted / retractable / solid / mixed roof preference	
Preferred materials	
Target budget	
Preferred installation timeframe	

2) Site measurements

Measurement check	Record
Proposed overall footprint (W × D)	
Clear internal width between posts	
Clear internal depth between posts	
Height wanted / headroom needed	
Distance to house wall	
Distance to nearest boundary	
Ground level differences at each post position	
Furniture footprint incl. chairs pulled out / circulation	
Paths, doors, steps, bins or access routes to keep clear	

3) Site conditions checklist

Check	Yes / No / Notes
Underground drains or services checked	
Overhead branches, gutters or cables checked	
Site exposed to strong wind	
Drainage or standing-water issues	
Nearby trees / root zones to consider	
Sun direction observed for the main use time	
Screening or privacy needs identified	
Climber planting space available at base	

Sketch box

Use this space for a simple plan view: mark boundaries, house wall, doors, paths, sun direction, and proposed post positions.

4) Planning, foundations & specification checks

Question	Notes
Any doubt over planning or permitted development?	
Listed building / designated land / flat or maisonette?	
Front or side position?	
Near shared boundary or subject to lease / covenant restrictions?	
Foundation type proposed (slab / concrete / ground screws / other)	
Supplier's wind / snow assumptions requested	
Bracing and load information requested	
Screens, sails, roof or climber load considered	
Drainage / guttering needed?	
Electrics / lighting interfaces needed?	
Care schedule and replacement-part availability requested	

5) Materials, shade & planting notes

Topic	Notes
Material under consideration (softwood / hardwood / steel / aluminium / composite)	
Finish / coating / treatment	
Responsible sourcing evidence requested	
Shade requirement by time of day	
Roof / canopy / louvre details	
Climber species planned	
Expected climber height / spread / weight	
Support method for climbers (wires / trellis / posts)	
Maintenance implications understood	

6) Questions to ask suppliers / installers

Supplier question	Answer / notes
What are the external dimensions and the clear internal dimensions between posts?	
What base / foundation does this exact design require on my site?	
How is the structure braced and what loads was it designed for?	
What is included in the price, and what is excluded?	
Who is responsible for drainage, electrics, screens, roof elements and planting interfaces?	
What maintenance schedule is required and what invalidates the warranty?	
Can damaged parts or future extras be ordered individually?	

7) Quotation comparison

Comparison point	Quote A	Quote B	Quote C
Supplier / contact			
Product / design name			
External dimensions			
Clear internal dimensions			
Total height / post positions			
Material grade / coating / treatment			
Roof / canopy / louvres / screens			
Foundation design & ground prep			
Drainage / gutters included			
Electrics / lighting included			
Delivery & access limits			
Assembly / installation			
Waste removal / spoil removal			
Warranty & exclusions			
Maintenance obligations			
Planning / drawings responsibility			
Lead time			
Total price incl. VAT			
Notes / concerns			

8) Final decision summary

Decision point	Notes
Best fit for the job	
Best value on a like-for-like scope	
Most confidence in foundations / structure	
Best maintenance / ownership fit	
Planning / permission concerns resolved	
Chosen supplier and reason	
Deposit date / next action	

Tip: compare quotes only when the scope is genuinely comparable. A lower headline price may exclude foundations, drainage, waste removal, screens, roof elements or installation.