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# From Reactive to Ready

*A Business Case for Civic.ly - Prepared for Sarah Cartwright*

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PREPARED BY

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Confidential

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## **1. Executive Summary**

The council is already doing a great deal right. High-risk assets are subject to compliance inspections, defects are being recorded, and the motivation to move from a reactive footing to a more planned, proactive approach is clear. That instinct to get ahead of issues - rather than simply respond to them - is exactly the right direction of travel, and Civic.ly is designed to make that shift as straightforward as possible.

Based on the health check responses, the areas where Civic.ly would add the most

immediate value are:

- **Asset register depth** - The current register meets AGAR requirements but does not yet carry the operational detail (condition, location, inspection history) needed for planned maintenance and insurance confidence.
- **Maintenance scheduling** - Maintenance is currently handled as issues arise or held in memory, which creates a succession risk and makes it difficult to forecast costs or demonstrate duty of care.
- **Disconnected defect records** - Defects are being logged, which is excellent practice, but they are not yet linked to assets or inspection outcomes, limiting the audit trail available to insurers and internal governance.
- **Scattered documentation** - Key documents exist but are spread across multiple locations, meaning that pulling together a comprehensive evidence pack for audit or insurance purposes currently requires significant effort.

Civic.ly is an all-in-one asset management platform built specifically for town and parish councils. It replaces spreadsheets, diaries, and disconnected records with a single web and mobile system that handles the asset register, inspection scheduling, maintenance jobs, defect tracking, and document management - all linked together and accessible from anywhere.

As an existing Scribe customer, the council qualifies for a **10% partnership discount**. The monthly subscription is **£12 per month** (cancel anytime with 30 days' notice), with an annual cost of **£144**. Against estimated annual benefits of **£1,900 - £2,600**, the return on investment is compelling and the payback period is effectively immediate.

The recommended next step is a short demonstration call to walk through the platform and confirm it is the right fit. You can book a time directly at [meetings-eu1.hubspot.com/john-fagan](https://meetings-eu1.hubspot.com/john-fagan).

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## 2. Current Situation

### The Estate

The council's estate, with a declared AGAR Box 9 value of **£72,822**, centres on one community building and its contents, together with notice boards. For a council operating on a precept of **£14,115**, this represents a meaningful asset base relative to annual income - one that warrants a structured, evidence-based approach to management.

The building and its contents are likely to include fixtures, furniture, equipment, and potentially electrical or mechanical plant, each with its own maintenance and compliance requirements. Notice boards, while modest in value, represent the council's public-facing presence and carry their own inspection and condition-monitoring needs.

### Tools and Processes

The council currently manages its assets using a combination of spreadsheets, a diary, and personal knowledge. The Scribe App is in use for financial management, which provides a solid foundation for AGAR reporting and financial control. These are practical, familiar tools that have served the council well, and they reflect the resourcefulness of a small team managing a broad range of responsibilities.

With a single member of staff responsible for operations, the current setup places a significant amount of institutional knowledge in one place. This is not unusual for councils of this size, but it does mean that the systems and processes themselves need to carry more of the burden - so that information is accessible regardless of who needs it or when.

## Key Challenges

- **Asset register limited to AGAR reporting.** The register currently groups assets at a high level for annual return purposes, without the operational detail – condition ratings, individual asset records, locations, or inspection history – needed to support planned maintenance or insurance accuracy.
- **Maintenance handled as issues arise.** There is an opportunity to move from responding to problems as they occur to a scheduled, forward-looking maintenance programme. Currently, maintenance tasks are held in memory rather than a managed system, which creates risk if circumstances change.
- **Defect records not linked to assets or inspections.** Defects are being logged, which is good practice, but without a direct link to specific assets and their inspection records, it is difficult to demonstrate a complete duty-of-care trail or spot recurring issues before they escalate.
- **Documents spread across multiple locations.** Certificates, warranties, contracts, and compliance records exist but are held in different places. Bringing them together into a coherent evidence pack – for an audit, an insurance query, or a councillor question – currently requires considerable effort.
- **Contractor work verified by reports alone.** Contractor activity is tracked through the reports they provide, but there is currently no independent means of verifying that scheduled visits have taken place or that work has been completed to the required standard.

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## 3. The Civic.ly Solution

Civic.ly is the only asset management platform built from the ground up for UK town

and parish councils. It combines a structured asset register, mobile inspection tools, maintenance scheduling, defect management, and document storage into a single system - accessible via web browser and a dedicated iOS and Android app.

Rather than replacing one spreadsheet with another, Civic.ly connects all the pieces together: an inspection failure automatically raises a defect, a defect triggers a job, and every action is timestamped and linked to the specific asset - creating an audit trail that is always up to date and ready to present.

**Key Features and Benefits**

<b>Feature</b>	<b>How It Helps</b>
<b>AI-Powered Asset Creation</b>	Upload smartphone photos of the building, contents, and notice boards and Civic.ly automatically creates individual asset records - complete with GPS location, asset type, condition, and relevant UK safety regulations. The AGAR-level register becomes a full operational register in a matter of hours, not weeks.
<b>Pre-Built Inspection Checklists</b>	With 28+ pre-built checklists covering buildings, outdoor assets, and equipment, inspections can be extended beyond high-risk compliance checks to cover all assets on a scheduled basis. Each completed

<b>Feature</b>	<b>How It Helps</b>
	<p>checklist is timestamped and stored against the asset, building an evidence trail that meets insurer and NALC requirements.</p>
<b>Mobile Field App (iOS and Android)</b>	<p>With a single member of staff managing operations, the ability to complete inspections, log defects, and update job records from a mobile device - rather than returning to the office to update a spreadsheet - saves meaningful time every week and eliminates the risk of records being lost or forgotten.</p>
<b>Smart Maintenance Scheduling</b>	<p>Replace memory-dependent maintenance with a scheduled programme. Recurring tasks can be set from daily to every ten years, with seasonal scheduling for tasks that vary across the year. The system prompts the right action at the right time, reducing the risk of missed servicing and extending asset lifespan.</p>

<b>Feature</b>	<b>How It Helps</b>
<b>Linked Defect and Job Workflows</b>	<p>When an inspection identifies an issue, a defect is raised directly from the failed checklist item and linked to the specific asset. A job can then be created from the defect and assigned for resolution. Every step is recorded, creating the complete inspection-to-resolution trail that is currently missing from the disconnected defect log.</p>
<b>Audit Trail and Reporting</b>	<p>The real-time dashboard shows asset conditions, inspection status, and outstanding jobs at a glance. PDF reports and CSV exports can be generated in seconds, making audit preparation and councillor reporting straightforward rather than time-consuming. Documents linked to assets are accessible from the same record.</p>
<b>Contractor Access and Oversight</b>	<p>Contractors can be given access to their assigned tasks and required to upload photographic evidence of completed work. This moves oversight</p>

Feature	How It Helps
	beyond relying on their own reports and gives the council independent, timestamped confirmation that scheduled visits and jobs have been completed.

## Investment

Item	Detail
Monthly Subscription	<b>£12 per month</b> (cancel anytime with 30 days' notice)
Scribe Partnership Discount	<b>10% applied</b> - as an existing Scribe customer, the council qualifies for an ongoing partnership discount
Annual Cost	<b>£144 per year</b>
What's Included	Unlimited users and assets, web dashboard, iOS and Android mobile app, all pre-built inspection checklists, ongoing updates, email support, and

Item	Detail
	typical onboarding within 1-2 weeks

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## 4. Benefits Analysis

### Operational Improvements

- SOCITM benchmarks indicate a **30-40% reduction in administration time** when councils move from manual to purpose-built digital systems.
- Completing inspections and logging defects via mobile eliminates the double-handling of paper records and reduces time spent updating spreadsheets after the fact.
- Linked workflows mean that a single action in the field (completing a checklist) automatically updates the asset record, the defect log, and the audit trail - with no additional data entry required.
- Scheduled maintenance tasks and automated reminders reduce the mental load on a single member of staff and ensure nothing slips through the gaps.

### Financial Benefits

- The Institute of Asset Management (IAM) finds that planned maintenance extends asset lifespan by **10-15%**, reducing the frequency and cost of replacements.
- Reactive repairs - fixing things after they fail - consistently cost more than scheduled preventive maintenance. Moving to a planned programme reduces emergency call-out costs.

- CIPFA research suggests councils with structured contractor oversight achieve **10-20% savings** on contractor costs through better scheduling, reduced duplication, and evidence-based commissioning.
- Accurate, itemised asset records support correct insurance valuation - avoiding both under-insurance (which leaves the council exposed) and over-insurance (which wastes precept funds).

## **Compliance and Risk Mitigation**

- A complete, timestamped audit trail - inspection records, defect logs, job completions - provides clear evidence that the council has met its duty of care, which is the primary defence in any insurance claim or complaint.
- Zurich Municipal research indicates that councils with documented inspection and maintenance programmes have up to **25% lower claims exposure** than those without.
- NALC's 2024 Model Financial Regulations (Section 16) require a comprehensive asset register, regular verification and inspections, and insurance and risk assessment records - all of which Civic.ly supports directly.
- Preparing for an internal audit or external inspection becomes a matter of generating a report rather than assembling scattered records under pressure.

## **Organisational Resilience**

- With a single member of staff managing operations, the risk of knowledge loss is real. Civic.ly holds all asset history, maintenance records, and inspection outcomes in the system - not in any individual's memory or personal files.
- Onboarding a new staff member or volunteer becomes significantly easier when the complete picture of the estate is accessible in one place.
- Councillors gain visibility of asset conditions and compliance status without needing to ask the clerk, reducing the burden of routine reporting and building

confidence in the council's governance.

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## 5. Return on Investment

### Inputs and Assumptions

Input	Value / Source
Operational Model	In-house (form response)
Staff Count	1 (form response)
Estate Value (AGAR Box 9)	£72,822 (form response)
Annual Precept	£14,115 (form response)
Key Assets	One community building and contents, notice boards (form response)
Assumed Clerk Hourly Rate	£15/hour (NALC LC3 scale, conservative estimate for a small council)
Estimated Admin Hours on Asset	Approximately 60-80 hours

Input	Value / Source
Management (per year)	(conservative: 1-1.5 hrs/week across inspections, records, reporting, document retrieval)
Estimated Annual Maintenance Spend	Estimated £1,500-£2,500 (typical for a single building estate at this precept level)

**Estimated Annual Benefits**

Category	Annual Benefit	Confidence Level
Admin efficiency (30% of 70 hrs at £15/hr)	<b>£315</b>	High
Reduced reactive repair costs (planned maintenance vs reactive)	<b>£300 - £500</b>	Medium
Asset longevity (10% maintenance saving on £72,822 estate over	<b>£500 - £800</b>	Medium

Category	Annual Benefit	Confidence Level
lifecycle)		
Risk and claims reduction (improved evidence trail, insurer confidence)	<b>£800 - £1,000</b>	Medium-Low
<b>Total Estimated Annual Benefit</b>	<b>£1,915 - £2,615</b>	

Summary	Figure
Annual Subscription Cost	<b>£144</b>
Estimated Annual Benefit	<b>£1,915 - £2,615</b>
Net Annual Benefit	<b>£1,771 - £2,471</b>
Payback Period	<b>Under 4 weeks</b>

Summary	Figure
3-Year Net Benefit	<b>£5,313 - £7,413</b>

**How These Figures Were Calculated**

Given the in-house operational model and single-staff structure, the analysis weights admin efficiency and asset longevity most heavily, as these are the areas where a purpose-built system delivers the most direct and measurable value. The admin efficiency figure applies SOCITM's conservative 30% benchmark to an estimated 70 hours per year of asset-related administration, costed at a modest £15 per hour.

The asset longevity and reactive repair savings apply IAM benchmarks (10-15% maintenance cost reduction through planned programmes) conservatively to the council's declared estate value and estimated maintenance spend. The risk and claims reduction figure reflects Zurich Municipal's finding that documented inspection and maintenance programmes reduce claims exposure by up to 25% - applied conservatively to a modest estimated annual insurance premium for a single-building estate.

All figures are deliberately conservative. The subscription cost of **£144 per year** represents approximately **1% of the annual precept**, making this one of the lowest-risk investments available to the council - with a payback period measured in weeks rather than years.

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**6. Conclusion**

The council is well-placed to take the next step in asset management. The instinct to move from a reactive approach to a planned, proactive one is sound, and the foundations – compliance inspections, defect recording, financial management through Scribe – are already in place. Civic.ly is the platform that connects those foundations into a single, coherent system.

At **£12 per month**, with no long-term commitment and a cancel-anytime guarantee, the financial risk is minimal. The potential return – reduced admin burden, lower repair costs, extended asset lifespan, and a robust compliance and audit trail – is substantial relative to the investment. Over three years, the estimated net benefit is between **£5,300 and £7,400** against a total subscription cost of **£432**.

The recommended next step is a short demonstration call – typically 30 minutes – to walk through the platform, answer any questions, and confirm that Civic.ly is the right fit for the council's specific situation. There is no obligation, and the business case can be adjusted based on anything that has been misunderstood or misrepresented from the health check responses.

Book a call at your convenience: [meetings-eu1.hubspot.com/john-fagan](https://meetings-eu1.hubspot.com/john-fagan)

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## 7. Cover Email

**To:** strumpshawch@gmail.com

**Subject:** Your Civic.ly Business Case – From Reactive to Ready

Hi Sarah,

Thank you for completing the Civic.ly Asset Management Health Check. It was great to see that the council is already thinking proactively about asset management – that came through clearly in your responses, and it's exactly the right approach for a council managing a building and estate on a tight precept. I've put together a tailored business case based on your health check, which is

attached. The two areas I'd highlight as most relevant to your situation are the opportunity to build a fuller operational asset register (beyond the AGAR-level groupings you currently have) and the ability to link your existing defect records directly to assets and inspections - creating a complete audit trail without any additional paperwork. The subscription is **£12 per month** (with a 10% Scribe discount already applied), and the estimated annual benefit is between **£1,900 and £2,600**.

If I've misunderstood any details from the form, please do let me know and I'll happily adjust the business case to better reflect your situation.

**Quick demo video (2 mins):** <https://youtu.be/4qVylqNRdd0>

**Book a call:** <https://meetings-eu1.hubspot.com/john-fagan>

Best wishes,

**John Fagan**

CEO and Founder, Civic.ly

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