**Briefing Note for Great Waltham Parish Council Meeting 19th June 2023**

To agree the purchase of computer software module(s) to allow the Council to introduce a paperless, cloud-based operating system for its administrative functions (The Clerk).

Introduction

1. Reviews of Council employees’ work practices have indicated time spend on routine administrative functions could be considerably reduced using a software package purchased from a specialised provider. The principal benefits being:
* Financial

Reduces the number of salaried hours for particular tasks).

* Data accuracy

Integrated software avoids manual calculations and facilitates instant cross-referencing of data for different purposes.

* Presentational

Provides consistent, professional looking communications to all stakeholders; a move away from a paper-based and/or reliance on MS Word and Excel software functionality will improve data accuracy the professionalism and efficiency of the Council.

This briefing note identifies the options available in the market, modules suited to the Council’s circumstances, costs involved, and a cost-benefit analysis (CBA) based on the recommended provider (see Appendix). Costs are unbudgeted in 2023/24. Based on current information and assumptions, with just three modules (more could be added) a net saving of c.£2,800 would be realised over the period of a 5-year contract.

Software Options

1. There are standard commercial business packages on the market (such as: Workday, XERO, QuickBooks, Sage) and also, with more relevance for the Council, specialised local authority software providers (for example: Parish Soft, Scribe, Rialtas, AdvantEDGE, EasyPc Accounts).
2. Websites for the commercial business packages are provided in the footnote below[[1]](#footnote-1), but this note focusses on the packages offering functionally most suitable for local authorities:
* Parish Soft (<https://www.parishsoft.com/accounting-for-parishes/>)

This is a Catholic Church based system with functionalities for administering fixed assets, payrolls, pensions and general accounting. Being church focused it misses some areas which are important to the Council; such as allotments and VAT. It is a web-based system with a single logon. However, it also links into the Church’s offering system and understandably has a strong focus in that direction.

* Scribe (<https://www.scribeaccounts.com/>)

Being a parish council focused software package, it covers several of the essential tasks important to the Council; such as AGAR, VAT 126 (the VAT reclaiming mechanism for claim for certain bodies), invoicing, bank reconciliations, reserving and asset register management. Support is provided and webinars are available. The system is not as extensive as the Rialtas or AdvantEDGE systems; however, Scribe has chosen to focus on the finance systems.

Cost: £1,835 in Year 1; £1,356 in Year 2 and subsequent years (plus any pricing interim increase).

* Rialtas (<https://www.rialtas.co.uk/>)

This is a web-based system specifically for parish and town councils. It includes functionalities for alpha accounts, asset management, facilities booking management, allotment management (including inspections). It looks professional and well-designed, and has the advantage of what seems to be a robust allotment inspections module.

Cost: £3,314 in Year 1; £1,196 in Year 2 and subsequent years (plus any interim pricing increase).

* AdvantEDGE ([https://edgeitsystems.com/AdvantEDGE/](https://edgeitsystems.com/advantedge/)).

See also <https://youtu.be/Pi8RRNWVwaw>. **It is recommended that members review this presentation before the meeting.**

Also a web-based system. It has an extensive range of solutions. It includes an administration module for managing meeting agendas, minutes, notices and declarations of interest, absent from other packages. It also includes functionalities for allotment management, asset management, facility bookings, finance, and playground/allotments/assets inspections (using software called InspectEDGE) and service manager.

Cost: See AdvantEDGE Year 1 costs in Appendix. Subsequent years would be module costs (subject to any interim pricing increases).

The AdvantEDGE system has been discussed by the Council’s Finance and General Purposes Committee at its previous meetings. A number of queries were raised and the following supplementary information obtained:

1. Testimonials

The Committee asked for any testimonials to be secured. This one has been obtained from a local parish council:



1. Other users

Details of other local councils who use the software were requested by the Committee. AdvantEDGE has confirmed these councils use its product: Brightlingsea Town Council, Boreham Parish Council, Hatfield Peverel Parish Council, Maldon Town Council, Leigh-On-Sea Town Council.

More generally, AdvantEDGE confirms it has over 360 customers, of which over 300 of these are local authorities.

1. Data retention and access

The Committee asked: What happens to the playground inspection data if anything would happen to the AdvantEDGE system as we need over 20 years of inspection records?

Response: AdvantEDGE uses escrow management supplied by Software Escrow Solutions (SES). If AdvantEDGE ceased to trade for any reason the escrow would be activated, and SES would failover (the procedure by which a system automatically transfers control to a duplicate system) the AdvantEDGE service to the Datto disaster recovery data centre for 60 days. During this period SES would provide AdvantEDGE clients with the ability to download their AdvantEDGE Playground database and Playground software with a six 6-month licence. The AdvantEDGE Playground contains the historical inspections. There are escrow options for an in-perpetuity software licence and for the software source code. SES will also provide the ability to download all of the inspection photographs and documents attached to the Playground database.

1. Module selection and commencement of use

The Committee asked whether the Council can start using the system at any time or does AdvantEDGE recommend commencement at a new financial year?

Response: The Council can begin to usage at any time, but some clients do prefer to start at the new financial year for the finance module.

1. Cost benefit analyses

The Committee asked whether anyone ever asked for a cost benefit analysis.

Response: Not directly. This is generally something you would complete to understand the benefits of using a system rather than manual processes, such as data security, back-ups, integrity of data, efficiency in working time, integrations etc.

* EasyPc Accounts (<http://www.easypcaccounts.co.uk/>).

An extremely basic accounts only system. Very low cost but with no additional modules available.

Recommendations

1. The two main software packages are Rialtas and AdvantEDGE. The costs are very similar, and both systems are web-based. AdvantEDGE continues to be developed with additional modules being built that will integrate with all others as necessary.
2. After looking at the ranging of systems and arranging demonstrations by those willing to provide them, the purchase of the AdvantEDGE system is recommended to the Council. It is further recommended that a 5-year contract is entered into for the Allotments, Finance and Playgrounds modules. Further modules (e.g. Admin+ and Asset Manager) can be added once the initial modules are bedded in and back filled with historical information.
3. The projected overall purchase costs are shown in the Appendix. Costs could vary if the number of users change and/or additional training or assistance from AdvantEDGE is required.
4. Based on these costs, assuming the staff salary savings indicated in the Appendix, the projected net saving over five years is £2,874.45.

**Appendix**



1. Workday (<https://www.workday.com/en-gb/homepage.html>); XERO (<https://www.xero.com/uk/small-businesses/>); Quickbooks (<https://quickbooks.intuit.com/uk/why-quickbooks/>); Sage (<https://www.sage.com/en-gb/sage-business-cloud/intacct/>) [↑](#footnote-ref-1)