EXAMPLE REPORT - FOR ILLUSTRATION PURPOSES ONLY

A COMPOSITE REVIEW · THE TRUST IS INVENTED, THE PATTERNS ARE NOT

Read together for the first time, your twenty asset registers show an estate under-declared by £510,000 - and records that cannot yet evidence what you own.

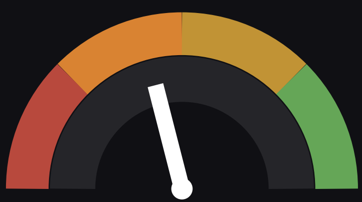
Twenty-two assets recorded in two schools simultaneously. Equipment still insured in a building demolished in 2023. Purchase dates absent in nineteen of twenty schools. Each finding is priced and actioned in the pages that follow.

Built only from records you already hold. No site visit. No new software.

ESTATE INTELLIGENCE HEALTH - WHAT THE RECORDS CAN EVIDENCE

Estate Intelligence Health

How visible, reliable and protected is your estate?

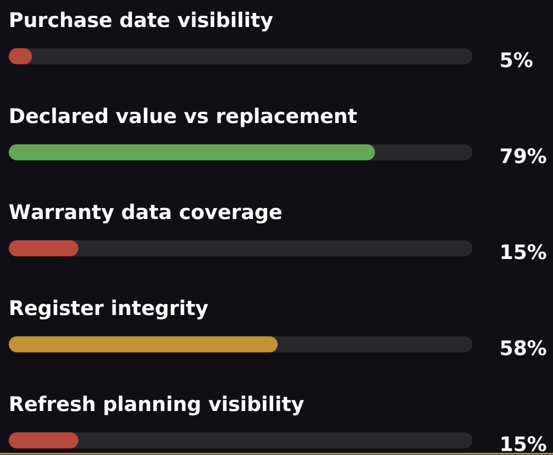


42%

Overall Health Score

ATTENTION REQUIRED

CRITICAL	POOR	FAIR	STRONG
0-25%	25-50%	50-75%	75-100%



The score is not a judgement on your trust. It measures how much of your estate can be evidenced from records you already hold.

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THE EVIDENCE BEHIND THE VERDICT

Page one is the diagnosis. This page is where it comes from - the combined position across your twenty registers, shown so your board can interrogate it.

6,840
ASSETS ON REGISTER
Across 20 schools

£2.41m
REPLACEMENT VALUE
Priced from the register

£1.90m
DECLARED VALUE
As stated in records

1 in 20
CANNOT RECONCILE
Against the register itself

SCHOOL PORTFOLIO - ABRIDGED

School	Phase	Pupils	IT/AV Devices	Est. Mid Value
Illustrative Primary 1	Primary	420	340	£121,000
Illustrative Primary 2	Primary	380	296	£104,000
Illustrative Primary 3	Primary	365	288	£98,000
Illustrative Secondary 1	Secondary	1180	812	£296,000
Illustrative Secondary 2	Secondary	1040	744	£262,000
Illustrative Specialist	Specialist	96	231	£84,000
... 14 further schools in a full review	-	-	-	-
TRUST TOTAL		**8,140**	**6,840**	**£2,410,000**

WHERE YOUR TWENTY REGISTERS AGREE

Schools whose registers hold no purchase dates

95%

Schools whose declared value falls below replacement cost

90%

Schools with warranty data covering under 15% of devices

85%

Schools with a documented refresh fund on record

15%

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FIVE FINDINGS - AND WHY THE FIFTH IS THE ONE THAT MATTERS

Five findings from your registers. Each states what was found, what it means, and the action it requires.

A NOTE ON WHAT THESE FINDINGS SAY ABOUT YOUR TRUST
Nothing here is unusual. Missing purchase dates, sparse warranty data and internal contradictions are the norm in almost every trust we review. What is unusual is seeing them together, priced, before an auditor or insurer does.

1 Twenty-two iPads recorded in two schools at once.

Twenty-two serial numbers appear in two of your schools' registers simultaneously. You cannot currently evidence which building holds them - or whether either does. Action: reconcile duplicate serials before the autumn return.

Found in the records - serial-number cross-check across your 20 registers.

2 A demolished building, still fully equipped on paper.

Laptops and interactive screens remain on your register and your insurance schedule, logged to a room lost in the 2023 rebuild - alongside assets dated in the future and acquisitions recorded after disposal. Action: strike disposed assets and correct impossible dates before the register is next relied upon.

Found in the records - date and location field validation across your 20 registers.

3 Your estate is under-declared by £510,000.

You declare £1.90m. Replacement cost of the same equipment is £2.41m. In a total-loss claim you absorb the difference - while still insuring equipment that no longer exists. Action: re-declare at replacement value and remove disposed assets from the schedule.

Found in the records - your declared values against replacement pricing, 20 registers.

4 Nineteen of your twenty schools cannot evidence the age of a single device.

Purchase dates were never captured. You cannot evidence device age, plan a refresh on fact rather than estimate, or answer the first question an auditor asks. Action: recover dates through a short supplier-records exercise - most are retrievable.

Found in the records - Purchase Date column, blank in 19 of your 20 registers.

5 None of the above was the real problem.

Every finding on this page sat in your own records, unread - because nothing in a normal year reads twenty registers against each other. That is not a failing; a well-run trust would miss all of it. Reading your records before anyone else has to is what this review has done.

Found in the records - the pattern across every review Prism has produced.

EXAMPLE REPORT - FOR ILLUSTRATION PURPOSES ONLY

WHAT YOUR REGISTER CANNOT TELL YOU

This review is built only from the records you supplied. Four things it therefore cannot establish - stated plainly, because that is what makes the rest of this report reliable.

- Whether an asset is physically in your buildings. A register records what was entered, not what is present. Closed by an onsite verification audit.
- How old each of your devices is. No purchase dates exist in your registers, so age can be estimated but never evidenced. Closed by a supplier-records exercise.
- Which of your devices remain under manufacturer support. Warranty data covers under 15% of your assets. Closed by the same records exercise.
- Whether each declared insurance value matches today's replacement cost. Your register alone cannot confirm every entry. Closed by re-declaring at replacement pricing.

THESE GAPS ARE CLOSABLE

Every gap on this page is closable, and none needs new software. Purchase dates and warranty status: a 90-minute supplier-records exercise per school. Physical presence and condition: an onsite verification audit. This review shows which gaps are worth closing first - it does not pretend to have closed the ones it cannot see.

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THE NEXT LAYER - YOUR COMPLIANCE RECORDS, READ TOGETHER

This review was built from your asset registers alone. But an asset register is only one of the record sets your trust already holds. Every year you pay for a stack of statutory compliance documents - and, like the registers, they are filed separately and rarely read across one another. That is where the next layer of intelligence sits.

RECORDS YOU ALREADY COMMISSION EVERY YEAR

- Condition surveys
- Fixed wiring (EICR) reports
- Asbestos management surveys & re-inspections
- Fire risk assessments
- Water hygiene (L8) records
- Gas safety & boiler servicing certificates
- Lift inspection (LOLER) reports
- Three-to-five-year capital expenditure history

WHAT A REVIEW SURFACES WHEN THESE ARE SUPPLIED

Where compliance actions cluster - and whether your spend follows them.

Cross-referencing open actions by site against your capital plan exposes where high-risk buildings receive little investment while low-risk ones absorb it.

Equipment technically compliant, but nearing the end of its life.

A boiler or fixed installation can pass its last inspection and still be two years from failure. Read against asset age, the review flags what is compliant today and a budget risk tomorrow.

Findings that were signed off, then never actioned in a capital plan.

Recommendations from a condition survey or EICR that never made it into subsequent budgets - a governance gap an auditor or insurer can see even if your board cannot.

Insurance carried at full value on equipment rated unsatisfactory.

Where a compliance report rates an asset poor or end-of-life while it is still declared at full replacement value, the exposure sits with you.

Documentation gaps and overdue re-inspections.

Surveys older than five years, EICRs past their due date, asbestos re-inspections lapsed - the quiet gaps that become urgent the moment they are questioned.

SUPPLY THE DOCUMENTS - THE ANALYSIS IS INCLUDED

A forward three-year compliance pipeline - surveys falling due, certificates expiring, recommendations becoming overdue - so your board sees what is coming before it arrives. None of this requires new inspections or a site visit. It is produced by reading the compliance documents you already commission each year, alongside your asset registers. Supply the documents, and this analysis is included in your review at no additional cost.

EXAMPLE REPORT - FOR ILLUSTRATION PURPOSES ONLY

FOR TOMORROW'S BOARD MEETING

The paragraph below is written to be lifted directly into tomorrow's board papers or minutes. Change nothing, or change everything - it exists so this review becomes a board decision, not a filed PDF.

READY TO PASTE - AGENDA ITEM / MINUTE TEXT

The Board considered the Prism Estate Intelligence Review of the trust's asset registers, noting: internal contradictions within the registers (the same assets logged in two schools; equipment recorded against rooms no longer in use), an insurance under-declaration of £510,000, and an inability to evidence device age across the estate. The Board noted that none of these findings would have emerged in the normal run of the year, and resolved to reconcile the register exceptions and re-declare the estate at replacement value ahead of the autumn annual return, retaining the review as evidence towards SFVS and SRM self-assessment.

Source: Prism Trust-Wide Estate Intelligence Review - PRISM-SHOWCASE, July 2026

THE THREE ACTIONS, NAMED AND OWNED

1. **Table this review at tomorrow's board meeting and adopt the minute above.**

   Owner: CFO | Deadline: tomorrow | The findings are priced and the resolution is drafted

2. **Reconcile the contradictions this review surfaces - duplicate serials, impossible dates, lost rooms.**

   Owner: CFO with school SBMs | Prism supplies per-school exception lists

3. **Re-declare the estate at replacement value and close the recording gaps - purchase dates, warranty, pricing.**

   Owner: COO | 90-minute supplier-records exercise per school

The information was already there. It was sitting in your twenty spreadsheets, waiting to be seen. The only question was whether you saw it before the return did.

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