

Beyond 17 August

Where the engagement lands, and proposed next steps.

THE ONE DECISION THIS DOCUMENT ASKS FOR

The engagement ends on Monday 17 August with the assistant live and in daily use. This document asks ICB to approve one thing: the ongoing development retainer, for work to continue from Tuesday 18 August.

£4,900 PER MONTH · SIX-MONTH INITIAL TERM, ONE MONTH'S NOTICE EITHER SIDE

- **£4,000 development.** The same monthly figure, for the same class of work: building and extending the assistant and other software, according to a rolling priority list reviewed monthly with Agatha.
- **£500 maintenance.** Keeping the live production system healthy. Hosting, the scheduled jobs, bug fixes and user support.
- **£400 to chair the AI Collective.** An agenda and a written briefing before each meeting, chairing at it, minutes and actions after (see section 3), and consultancy between meetings.

PREPARED BY

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FOR

Agatha · ICB Operations

SPEND APPROVAL

Julius Tafura

DATE

August 2026

Where the engagement lands

Delivered against the signed terms

The engagement letter of 15 May 2026 set the scope in terms of four missions, with varying expectations: one mission at **will deliver**, two at **expect to deliver**, and one at **explore**. The table below sets each mission's expectations against its outcomes.

MISSION	COMMITMENT IN THE SIGNED TERMS	DELIVERED BY 17 AUGUST	POSITION
A · Practice Licence processing	WILL DELIVER <i>"An AI-assisted document-checking and decision-support layer over the seven-stage PLP SOP... surfaces flags and check-this prompts to the PLP, and drafts outbound correspondence subject to human review."</i>	The dashboard is live and in daily team use: the applications gallery, per-application timelines with live mailbox integration, document verification, the Sodalís lane, status tracking, and per-user access under row-level security. Outbound drafting is the final component and lands within the engagement window.	Complete Drafting completes in-term.
B · Member email triage	EXPECT TO DELIVER <i>"Triage of inbound member email queries with suggested responses and check-this lists. Coverage breadth depends on the eval set that can be constructed from historical exchanges..."</i>	The triage layer is delivered: full-mailbox ingest (5,456 messages), automated redaction of member data before any AI inference, classification at 98.3% accuracy against a human-corrected reference set, and thread-to-application linkage. Suggested-response drafting is in progress and shares its machinery with the Mission A drafting work.	Partial Triage delivered; suggested responses open.
C · Case management and complaints	EXPECT TO DELIVER <i>"Tooling for the small but high-stakes population of active complaint cases... Exact shape depends on how the case-state model emerges in early discovery."</i>	Removed from scope by ICB during the engagement: complaints tooling now sits with the Sodalís replacement build, and case volume was judged too low to justify dedicated software.	Removed by ICB Reassigned.

MISSION	COMMITMENT IN THE SIGNED TERMS	DELIVERED BY 17 AUGUST	POSITION
D · Exemptions	EXPLORE <i>"A cross-team discovery workstream investigating how an analogous grounded-inference approach might serve the separate Exemptions team... Any subsequent build emerges from discovery findings."</i>	A production system: the exemptions team queue over the live 2026 backlog (158 applications), a secure applicant form live in production with guarded document upload, per-document verification, a swappable background-check checklist, and a full decision audit trail.	In production A live production system is currently with the Exemptions team for testing and feedback.

Going forward

Several requests arrived during the engagement window, after the mission scope was set. They are the first items on the retainer's priority list, and they are what the development allocation starts on from 18 August.

Dashboard reporting and export. Application processing metrics by selectable time period and per-team-member activity visibility, exportable, as requested by Garry. Work begins in-term; whatever remains on 17 August carries straight over.

Exam signups automation. The core of the next development tranche.

Member Services dashboard. An extension of the two dashboards already built and in use, not a new system.

Skills Challenge Platform scoping. The scoping step resolves what the platform actually is: a tracker and a full platform differ in time commitment by multiples.

The knowledge base. A single searchable place for ICB's own policy and process material, so the team answers a question from the source rather than from memory. It exists in working form; the work is fortification and deployment.

The qualification calculator. A public-facing tool letting someone check what their existing qualifications count for before they apply, drawing on the same list of accepted qualifications the exemptions system uses. It exists in working form; the work is fortification and deployment.

The list is not fixed. Anything the team wants built or improved can join it, and the monthly review with Agatha decides the order.

The proposal: development retainer

FOR APPROVAL

FROM 18 AUGUST 2026

£4,900 / month

No applicable VAT · invoiced monthly in advance

£4,000 development**+ £500 maintenance****+ £400 AI Collective chair**

One month's written notice either side · reviewed annually

The development allocation is the same £4,000 per month ICB has paid throughout the engagement, for the same class of work: building and extending the assistant. The £500 maintenance line exists because a live production system, used daily by the team, needs keeping healthy independently of any new build. The £400 chair line is set out below.

The engagement letter states that "a post-handover support retainer of bounded scope and pricing will be agreed separately at that point". This is that agreement.

What each line covers

Maintenance · £500

The baseline that keeps the live system healthy:

- Hosting oversight and billing-alert response
- Health of the scheduled jobs and data-refresh runner
- Defect fixes on shipped features
- User access and team support

Development · £4,000

Anything new: features, new surfaces, integrations, scoping work. Directed by a rolling priority list reviewed monthly with Agatha.

The AI Collective chair · £400

Chairing ICB's AI Collective on the same term and notice as the retainer, with the fee attached to defined outputs rather than to the seat:

Before each meeting: the agenda, plus a short written briefing on what has changed in AI that ICB should be aware of or act on. **At the meeting:** chairing. **After:** minutes, decisions, actions, and a summary suitable for wider distribution.

How the allocation works

- **A rolling priority list, reviewed monthly with Agatha.** The list decides what the allocation is spent on; and we audit that list together once a month.
- **The list runs longer than the month.** New requests join the sequence rather than expanding the monthly cost.
- **No rollover.** Unused allocation does not accumulate; each month stands alone.

AML Online is noted here for completeness: whether that build sits with me at all is still an open question on ICB's side.

What the retainer doesn't include

The boundary is software. The retainer builds and maintains ICB's software; writing course material and running marketing are not software, and each already has its own agreement.

- **It is not operational cover.** The retainer builds and maintains the system; if hands-on processing of Practice Licences becomes necessary, this is billed separately, see section 4.
- **It does not include AI Academy course development.** Course authorship, course IP and Academy fees sit entirely outside this retainer and are governed by the separate AI Academy heads of terms.
- **It does not touch the marketing engagement.** That remains a separate arrangement, unaffected by this document.

Intellectual property

All output produced under the retainer is ICB's property on the same terms as the engagement letter, with the single Academy carve-out stated above.

On-demand Practice Licence cover

A standing option alongside the retainer, priced now so there is never a negotiation at the moment of need. It is not part of the approval this document asks for; it is switched on separately, if and when ICB wants it.

On-demand Practice Licence cover

£500 / week

One hour per working day on the Practice Licence inbox, as currently provided. One-week minimum, invoiced in arrears, available on request when absence or workload requires it.

This is priced as senior cover that needs no ramp-up on a regulated workflow, not as clerical hours. For planned absences and routine load, the team covering its own queue remains the sensible default; this option exists so that unplanned gaps have a same-week answer.

Hosting: ownership and running costs

Ownership

Going forward, ICB will own its cloud infrastructure directly, attaching its own payment method to the accounts that run the assistant, and paying each vendor directly. I hold administrative access so new projects and sites can be added without an approval step, and I'll receive billing alerts for every account, so a failed payment is caught before it takes anything down. There is no pass-through billing and no margin on infrastructure: every hosting pound goes from ICB to the vendor.

Running costs

Figures are the vendors' current pricing; dollar amounts shown with approximate sterling.

Running today

ITEM	VENDOR	COST	NOTES
Database, authentication and storage platform	Supabase	\$25 / month (≈ £20)	The core of the system.
Dashboard hosting	Vercel	≈ \$20 / month (≈ £16)	Currently on a development plan at no charge; moves to an ICB-owned team plan at handover.
Sign-in email delivery	Resend	£0	Free tier at current volume.
AI inference (classification, summaries)	OpenRouter	< £5 / month	Grows modestly as the drafting tools enter daily use.
Scheduled refresh runner	Hetzner	≈ £5–10 / month	Currently runs on my own server at no charge; a small ICB-owned instance at handover.
Approximate total at handover	—	≈ £45–55 / month	

Governance and approval

Connected-party position

The disclosure from the engagement letter continues unchanged: I am the spouse of ICB's CEO, the interest is declared, and the ICB procurement and approval chain is recused accordingly. For this package that recusal is made concrete in the approval route below.

Approval route

- **Agatha**, as Head of Operations, confirms the scope and is the counterparty for the monthly priority review.
- **Julius**, as Finance Director, approves the spend.
- **Confirmation** works the way the engagement letter did: an affirmative reply to the covering email stands as agreement, or we discuss by reply.

Term

The retainer runs from Tuesday 18 August 2026 for an initial six months, with one month's written notice either side and an annual review of scope and pricing. Fees will continue to be invoiced monthly in advance with no applicable VAT.