



Request for Quotation

Development of Course Booking Management System

Background

In January 1995 Peter Edwards established Peter Edwards Law. Today we have a dedicated team committed to making sure we are at the forefront of mental health and incapacity legal issues.

More than 6 million people in the UK suffer from mental health issues or lack capacity. Peter Edwards Law specialises in Mental Health and Incapacity Law and works solely to challenge injustices. Whether it is assisting patients regain control of their life or making sure individuals prepare for the event they may lose their mental health or capacity.

We believe in what we do. As a result, we have built an enviable reputation as a leading practice in this specialist area. We are one of the very few highly specialised practices working exclusively in the areas of mental capacity and mental health. That is all that we do.

Part of this service is ensuring organisations such as schools, hospitals, local authorities care homes and other law practices etc. are aware of the very latest legislation and issues impacting on them.

We have a range of popular training courses we deliver approximately once a quarter to these sectors. Prior to the pandemic they were delivered in-house at our offices in Hoylake, Wirral. However, over the last year we have delivered these courses via Zoom.

This has in fact worked out well and means that we can reach out to more people as we are not limited to room size.

The current process

Our systems need updating though as the process is not really in keeping with a modern, online expectations.

Currently bookings are taken through the WordPress website. This is a form which collects the information about who is attending. There is a separate form for each course. Details from these forms are then copied to a spreadsheet where we maintain all attendees.

Training materials and course information are then sent out manually and individually as are invoices.

Once courses are completed, certificates are created in Word and sent out to each attendee manually – one by one. We often get 20-30 people attending courses so this can be time

consuming, particularly if we run 4 courses in a month. This leaves room for sending the wrong certificate to the wrong person. If certificates are lost or deleted there is then a lot of digging around to match the person with the course they attended.

Requirement

For our administrator we would like to bring together these separate processes and reduce the time-consuming sending of emails and chasing invoices. For customers we want them to be able to book a training course quickly for multiple people, login and view current and previous bookings and receive an invoice and training certificates upon completion.

This needs to be simple. This is not a full invoicing system, nor a staff management system. Currently only one person delivers all the training. This may increase at a later date, but the system does not need to record staff availability. Invoices are managed on a separate system. Often the person booking the course does not have access to company bank cards, so we do not need to take payments online as most customers want to be invoiced.

- All the current training courses and details need to be added to one system. New courses can be added, and existing courses can be amended/deleted/archived by the administrator.
- The current courses will be displayed on the website for customers to book
- Any training documents (usually a PowerPoint presentation) can be attached to each course.
- Customers can register and book courses for 1 or more people
- Once booked the customer will receive confirmation of the booking along with an invoice, course materials and Zoom link and the admin person will be notified too.
- Nearer the time of the booking the admin can send a reminder to some or all of the course participants to remind them about the upcoming course, again with the course materials and Zoom link.
- Once the course has been completed. Individuals can be marked as attended and certificates sent to all. Certificates will have the name of the course, date, name of attendee, who delivered it and the number of CPD points they have collected. In the email message there will be a link to Survey Monkey to encourage people to provide feedback.
- If customers lose certificates, they can login to their account, see which courses have been attended and download the relevant one.
- Once invoices have been paid, these will be manually ticked off and marked as paid. Any unpaid invoices will be listed on the dashboard and reminder emails can be sent from the system

What do you want goods/service to do?

It's important the supplier understands the simplicity of the requirement and doesn't bloat the solution with unnecessary functionality. Only 2 or 3 people will access the system so it is not needed company wide. Suppliers need to demonstrate that this will primarily reduce the current administration burden and enhance our customer's experience. We have no preference whether the solution is incorporated into our current WordPress site or separate - as long as courses don't have to be added separately to both.



Deliverable Timescale

Start: end of October 2021/ early November 2021

End: 30 November 2021

Indicative Budget

£7,000

Evaluation Criteria

Quotations will be assessed and scored on the following criteria:

Quality/ Technical Merit (50%)

Supplier must demonstrate they have the technical and professional capability to deliver the requirement.

Delivery Timescale (20%)

Supplier must demonstrate they can deliver the requirement to timescales above.

Cost/Value for money (30%)

Does supplier offer value for money. This will not necessarily be the cheapest quote.

Scoring Methodology

4 Excellent	Proposal meets and, in some places, exceeds the required standard
3 Good	Proposal meets required standard
2 Acceptable	Proposal meets the required standard in most respects, but is lacking or inconsistent in others
1 Poor	Proposal falls short of expected standard
0 Unacceptable	Completely or significantly fails to meet required standard or does not provide the relevant answer

Proposal Format

Proposals should clearly demonstrate how they meet the requirement set out above.

Deadline and Submission

Proposals are required by 23rd October 2021 either electronically to peter@peteredwardslaw.com or by post to Peter Edwards, Ventura House, 8 Market Street, Hoylake, Wirral CH47 2AE.

Date Published

13th October 2021

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Conditions of Tender

- Please be aware that due to the relatively low indicative budget for this work (i.e., less than the current OJEU limits) there is no regulatory obligation for us to provide feedback if you are unsuccessful.
- We reserve the right to discontinue this tender process at any time and not award a contract.
- You will not be entitled to claim from us any costs or expenses which you may incur in preparing and/or submitting your Tender at any stage of this exercises. This applies whether or not your organisation is successful.