

# INCO

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## *Proposal for the Design and Development of the Billericay Training Tracking System*

1.	Introduction.....	3
1.1.	Preface .....	3
1.2.	Contacts.....	3
1.3.	Overview.....	4
2.	About INCO.....	5
2.1.	Profile.....	5
2.2.	Services .....	6
3.	References.....	7
4.	Billericay Teaching School Alliance Training Tracking System .....	8
4.1.	Overview.....	8
4.2.	Front-end / public website features .....	8
4.3.	Course administration system for public website.....	9
4.4.	Core course and booking management system .....	9
4.4.1.	System Function Overview.....	9
4.4.2.	System Reporting Overview .....	9
4.5.	Membership / Registration.....	10
4.6.	Transaction Manager to regulate and automate booking processes .....	11
4.7.	Course / Programme Structure.....	12
4.8.	Reminder / Course E-mails.....	12
5.	Website / System Design and Development Process.....	14
5.1.	Responsive Design.....	14
5.2.	Development Platform.....	14
6.	Website Support Services.....	15
6.1.	Application Support .....	15
6.2.	Testing & Training.....	15
6.3.	Hosting / Server Management.....	16
6.4.	Website Accessibility and Usability Standards: W3C and Equality Act .....	16
7.	Implementation Timeframe.....	17
8.	Charges.....	18
8.1.	Design, Development and Implementation.....	18

8.2. Annual Hosting and Application Support.....18

8.3. Other Charges, & VAT .....18

9. Acceptance of proposal .....19

9.1. Development Charges.....19

9.1.1. *Stage Payments*.....19

9.2. Annual Costs .....19

10. Order Acceptance ..... 20

# 1. Introduction

## 1.1. Preface

INCO thanks Billericay Teaching School Alliance for the opportunity to put forward a proposal for the design and development of the new Training Tracking System. Information in this document is proprietary to INCO and is provided for internal use only. It should be treated as confidential and must not be released to any third party without the express written permission of INCO.

## 1.2. Contacts

**Billericay Teaching School Alliance**  
**The Billericay School**  
**School Road**  
**Billericay**  
**Essex**  
**CM12 9LH**  
**Tel: 01277 314420**  
**WWW: [www.billericayteachingschoolalliance.com](http://www.billericayteachingschoolalliance.com)**  
**Contact: Melanie Jones: [mjones@billericay.essex.sch.uk](mailto:mjones@billericay.essex.sch.uk)**

**INCO**  
**11 Pendeford Place**  
**Pendeford Business Park**  
**Wobaston Road**  
**Wolverhampton**  
**WV9 5HD.**  
**Tel: 03330 124907**  
**WWW: [www.inco-education.co.uk](http://www.inco-education.co.uk)**

**Amit Sharma: Head of Business Development: [as@inco-digital.com](mailto:as@inco-digital.com)**  
**Stuart Millington: Development Manager: [sam@inco-digital.com](mailto:sam@inco-digital.com)**

### 1.3. Overview

We are delighted to submit this estimate for design, development and implementation of the Billerica Training Tracking System further to our recent discussions. Do not hesitate to contact us if you have any queries.

## 2. About INCO

### 2.1. Profile

INCO is a leading web design, web development and marketing firm specialising in the Education Sector. We have worked with many Schools, Academies, MATs and Colleges around the country providing bespoke web, digital, branding, mobile, marketing, e-learning and web marketing solutions. Our aim is to build long term relationships with the organisations that we work with.

INCO's unique selling points:

- A vast track record with over 18 years' experience in Education working with many schools around the country with a view to improving communications strategies via the use of innovative web + digital solutions, cutting edge marketing material and effective web / software systems.
- We create bespoke designed websites (not template based solutions) that "work" across all mediums (multi-browsers, smart phones, tablets, etc.) - "any" design is possible.
- Constant R&D into new web technologies and marketing methods for Schools
- A strong post website implementation support structure with INCO positioning itself as an extension of each School that it works with.
- Vast development knowledge and experience in a variety of web systems. This includes our own highly secure, tried and tested web content management systems (INCO-CMS) developed by INCO over the last decade and used by hundreds of Schools. We also offer other CMS systems to suit each organisation e.g. WordPress.
- Strong bespoke web system development experience based on organisational processes.
- Business/organisational process analysis.
- Long term relationship approach - "can do" attitude offering ongoing advice and guidance to Schools with a view to constantly evolving in the web, systems, digital and marketing arena.
- "Regular" discussions are be offered to review/discuss progress, web /system usage, ongoing ideas and other areas that INCO can assist with.

With regards to the web development services we aim to offer maximum value from new and established technologies, as best suited to client needs, on an efficient and planned basis. Our strengths lie in high functionality web developments, where good web design standards, usability, content, bespoke visual design, functionality and ongoing support are of the utmost importance, leading us to work on and deliver high class websites working to strict deadlines via effective project management. Our branding, design and marketing skills enable us to create the appropriate image for each organisation and create eye catching and focused marketing material.

## 2.2. Services

We have developed, and provide, a range of services including:

- Web design and development
- Bespoke software/system development
- Graphic/multimedia/digital design
- Branding services
- Web content management systems
- E-commerce systems
- Integration of websites with third party systems
- Mobile Apps
- Prospectus/newsletter design
- Interactive online prospectus/newsletter design and development
- Logo/artwork design
- Signage solutions
- Creative design of stationery, business cards, letterheads, school diaries, posters, folders, banners, banner stands & pop-up stands, POS items, exhibition graphics, display boards, etc.
- Communications strategy review, development and implementation
- Digital marketing
- Social media strategy
- Social media platform/content management
- Content creation services to cover web, print, social media, e.g. Twitter, blogs, etc.
- Search engine optimisation
- School video creation and professional photography services
- 360 degree panoramas, interactive virtual tours
- Business support services for schools, academies and Multi Academy Trusts.
- Ongoing Consultancy: systems, web, organisational development, marketing, leadership

Please visit [www.inco-education.co.uk](http://www.inco-education.co.uk) for further information about our products and services.

### 3. References

Below is a selection of INCO's clients in the Education sector. We hope that the websites listed below highlight our "credibility by association" in this arena.

Clapton Girls' Academy, London

<http://www.clapton.hackney.sch.uk/>

Billericay School, Essex

<http://www.billericay.essex.sch.uk/>

Palmers Green School, London

<http://www.pghs.co.uk/>

Inspired Learning Group, London

<http://www.inspiredlearninggroup.co.uk/>

Arden Academy, Solihull

<http://www.arden.solihull.sch.uk/>

Ribston Hall High School, Gloucestershire

<http://www.ribstonhall.gloucs.sch.uk/>

Northgate High School, Suffolk

<http://www.northgate.suffolk.sch.uk/>

The Manor Academy, Nottinghamshire

<http://www.themanor.notts.sch.uk/>

The Connaught School, London

<http://www.connaught-school.co.uk/>

## 4. Billerica Teaching School Alliance Training Tracking System

### 4.1. Overview

The system will include the following elements:

- Front-end / public sub-site, styled to match the theme of the main TSA website, for course listings & bookings, e.g. “<http://courses.billericayteachingschoolalliance.com/>”.
- Administration system to maintain public course details for display on the website.
- Creation and upload of sample content (up to 5 courses).
- Core course and booking management system.
- Reporting and Data Export facilities.
- An (API) Interface to a Mailing List System (e.g. MailChimp or YMLP) for sending reminder and course related e-mails to delegates.
- System Administrator Training.

INCO will cover the entire process from design, development and implementation, through to ongoing support, hosting, training - all for a fixed price. The project will be broken down into stages.

### 4.2. Front-end / public website features

The front-end / public website element of the system will be designed to replace the courses section of the current TSA website (<http://www.billericayteachingschoolalliance.com/courses/>). It will be a sub-site in the same visual style as the current website.

As it will not be part of the main website, it will have its own navigational structure, with clear routes to and from the main website.

The site will list courses with course details, dates and availability.

It will also allow users to make bookings, subject to availability.

### 4.3. Course administration system for public website

To ensure that system administration is as smooth as possible, as part of the main system, the course details that are displayed on the public website will be maintained within the system itself. This avoids maintaining courses in multiple places, or in multiple systems.

### 4.4. Core course and booking management system

The core system will manage the entire course processing from booking to attendance to reporting. However, billing will be handled manually on the basis of reports generated by the system.

#### 4.4.1. System Function Overview

- Upon receiving a booking the system will confirm, via Transaction Manager, that there is space on the course for the booking to proceed and, if so, an automatic confirmation email will be sent to the User (cc Admin email address).
- Where there is insufficient space on the programme, User will be notified via automatic email and cc Admin.
- Ability to send reminder emails where text in the email can be manipulated beforehand and documents attached. This would be used for issuing pre-course reading, etc.
- Ability for the admin to manually add/delete or amend bookings (some bookings are emailed via paper form).
- Ability for the admin to manually add/delete or amend bookings received via website.
- Attendance tracking – to be able to indicate via a dropdown field if a delegate ‘ATTENDS’ a course, ‘CANCELS’ or ‘NO SHOWS’.
- Cancellations – to be able to indicate whether a delegate’s place is chargeable (default) or non-chargeable. This data will be generated onto a report that will be sent to our accounts team for them to produce invoices to issue to delegates schools.
- Programme functionality. This meaning that certain ‘programmes’ have a series of different sessions forming a programme. Different people may attend different sessions within that programme or they can attend the whole programme.

#### 4.4.2. System Reporting Overview

- Delegate Register per course. This is a list of names of those delegates due to attend a programme/course. It is placed on the table and delegates sign beside their name to confirm their attendance.
- To report by:

- All courses running over a defined date period (no delegate detail, just numbers booked or attended)
- All courses running over a defined date period (including delegate detail)
- Specific courses over a defined date period (no delegate detail, just numbers booked or attended)
- Specific courses over a defined date period (including delegate detail)
- Specific courses over a defined date period per school (no delegate detail, just numbers booked or attended)
- Specific courses over a defined date period per school (including delegate detail)
- All courses attended over a date period for a specific school (no delegate detail, just numbers booked or attended)
- All courses attended over a date period for a specific school (including delegate detail)
- Invoicing report per course
- All reports will be generated as PDF's so that they can be printed or e-mailed.
- Certain reports - where there is no structured data - may also be implemented as CSV exports to allow raw data to be imported and manipulated into Excel.

#### 4.5. Membership / Registration

The concept of “membership” was mentioned during the initial telephone conversation. It was an addition to the original specification.

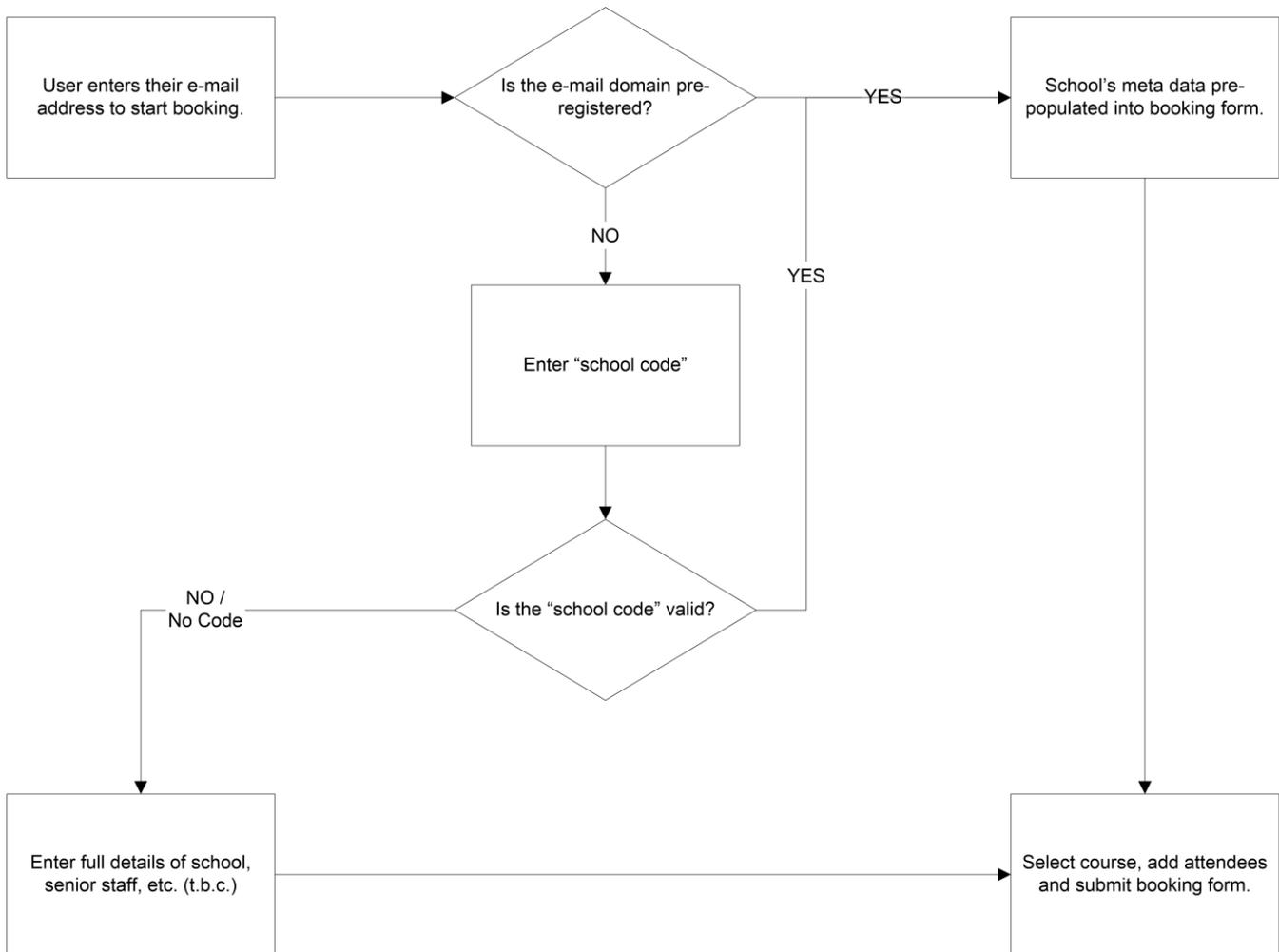
However, even whilst discussing the concept, it evolved from a “pure” membership system to more of a pre-registration and approval workflow.

As things stand, this is proposed as a method of streamlining bookings from members of staff from pre-registered schools.

By requesting that staff members who are making bookings either use their official school e-mail address (using the school’s domain name) or to enter a validation code (from the school’s office) such users will not have to enter their school’s metadata and their bookings can be automatically approved (subject to other design choices).

If a booking is made by a user who’s e-mail address is not from a registered school and they do not provide a validation code, then they must complete additional form fields with the details of their school.

The list of pre-registered schools would be maintained by the system administrators only.



Adjusted prices (discounts, etc.) for members would be made manually by the system administrators. It was specified that editing of prices should, where possible, be “spreadsheet or grid style”. Depending upon the specific screen, this may also be implemented by “bulk updates”.

#### 4.6. Transaction Manager to regulate and automate booking processes

The largest subject of discussion was that of the “transaction manager” and the areas that it affected. The “transaction manager” is a mechanism to prevent courses being over booked. It also allows bookings to be automatically confirmed and allow for a “standby” list of people awaiting places arising from cancellations.

Whilst overbooking has not been a frequent issue, it was mentioned that it has happened and has the potential to occur again. Without the “transaction manager”, race conditions could mean that multiple people booking at the same time book the same places. This would leave you with, for

example, 54 places booked on a 50-place course. Such situations are handled manually for now, but “transaction manager” could prevent them from occurring in the first place.

Function	With “transaction manager”	Without “transaction manager”
Prevent Overbooking (via Race Conditions)	Yes	No
Auto-confirm bookings	Yes	No
Manually confirm all bookings	n/a	Yes
Cancel bookings	Yes	Yes
“Standby” waiting list	Yes	Yes, but additional function
Promote Standby to Booked	Yes	Yes, but additional function
Manual (back-end) bookings	Yes	Yes

In addition to the basic “prevent overbooking” feature of a “transaction manager”, it also facilitates the automation of other features, such as auto-confirming bookings and streamlining waiting lists for courses.

#### 4.7. Course / Programme Structure

It was noted that some courses have multiple sessions, whilst some only have one.

However, for consistency within the database and system design, it is proposed that all courses are treated as “programmes” with one, or more, sessions.

When creating a course/programme, the administrator will specify the number of sessions within the course and the system will present screens appropriate for the number of sessions.

Default pricing and available places will be set at the session level.

#### 4.8. Reminder / Course E-mails

One functional requirement was the ability to send “reminder” or “course information” e-mail’s to people who have booked onto courses.

As these e-mails are both “ad-hoc” in terms of timing and contain various attachments relating to the individual course/session, it would increase the system complexity if this was to be built into the system.

As such, it is recommended that this functionality be provided by an external mailing list system, e.g. MailChimp or YMLP.

When a course is flagged as booked, the system would generate one, or more, mailing lists via an API. There would be one list for everyone on the course and additional lists for each session where there are multiple sessions, e.g.:

For a 1-session course:

- “Course X, May 2017”

For a 5-session course:

- “Course X, May 2017”
- “Course X, May 2017 – Session 1”
- “Course X, May 2017 – Session 2”
- “Course X, May 2017 – Session 3”
- “Course X, May 2017 – Session 4”
- “Course X, May 2017 – Session 5”

The system administrator would simply compose the e-mail, add the attachments, and select which list to send to. All the delivery tracking, bounces, etc. would be handled by the mailing list system.

## 5. Website / System Design and Development Process

We always seek to deliver high class web and marketing solutions working to strict deadlines via effective project management. Our experienced range of consultants will discuss, review and propose the most suitable options for you. We aim to offer maximum value from new and established technologies, to suit your unique requirements.

The details of each main section of the system will be discussed and agreed with you during the detail specification stage of this development, within the agreed budget.

### 5.1. Responsive Design

It is very important that the public view of your system is accessible via smartphones and handheld devices. Every website that INCO designs and develops is accessible in mobile with a "fully responsive" version of the website to provide optimised layouts for mobile phones and tablets. With a responsive design your users are presented with a layout that is specifically designed for their device, whether it is a small phone, a large tablet or a desktop computer.

### 5.2. Development Platform

INCO propose that this development be hosted on Linux servers running the Apache web server. The content management software will be developed in PHP with a MySQL database back-end. This combination provides several advantages over other proprietary options:

- Lower development costs.
- Lower hosting costs.
- No server licensing costs.
- Increased security and reliability.
- Apache is the world's most popular web server.

## 6. Website Support Services

### 6.1. Application Support

INCO's standard application support arrangements include support via e-mail support for server management and software issues. This covers management of the server configuration itself and resolution of any bugs/issues with the site software. This support is an integral part of our hosting package and is effective for the duration of the hosting arrangements.

The Annual Application Support fee includes; hosting, application support via e-mail for server management and software issues and security patches during the licence period.

To ensure effective resolution of issues one member of School staff must be appointed as the primary contact for all support issues. All support requests must be sent, initially via INCO's support ticket system. This will enable effective filtering of support issues by both parties to eliminate, for example multiple responses to the same issue, the same issue being reported by multiple people, etc.

INCO runs a support ticket system to ensure timely, prioritised, responses to all support issues. Support tickets are raised by e-mailing support@inco-soft.net where one of our support team will analyse and prioritise the ticket for a timely response.

INCO's support arrangements are designed to build long-term relationships with our clients, with INCO acting as a partner, providing support and advice - both now and into the future.

### 6.2. Testing & Training

In addition to the system being easy for the users to navigate and use, it is essential that the administration interfaces are easy for the administrators to use. It is far better to have an easily usable administration interface that to spend an additional time training people to use the system.

By involving Billericay in the testing stages of the development, prior to the final approval and launch of the system, the majority of training will be covered during the development with INCO providing the appropriate guidance on use of the administration interface via telephone and e-mail. Up to 3 hours of telephone training and support will be allocated as part of this proposal. This should cover Billericay's initial training and support requirements.

If Billericay wishes for additional personnel to be trained, on-site training, or on-going training, INCO can provide an additional quotation for this.

### 6.3. Hosting / Server Management

It is essential that the server chosen to host your system is of an appropriate size to cater for the expected initial traffic levels and to allow for reasonable growth. Migrating to a larger server will inevitably require downtime, which should be avoided where possible. Hosting requirements are always difficult to predict for a new site as the number of visitors and frequency of use is unknown until the site is launched. However, such a site will require appropriate hosting to support the databases within the overall site.

INCO provides hosting on a variety of servers with capacities varying from 100's of small static sites, to dedicated server clusters capable of hosting enterprise scale sites.

All servers are continuously monitored and support staff are available to resolve any issues 24x7. The servers, which INCO propose to use for this project offer a 99.9% connectivity service level. Over the last few years INCO's experience has been that server connectivity exceeds the 99.9% level. INCO will monitor the usage of the site once it is live and, in conjunction with you, plan and agree any upgrades required for the server(s).

The estimated charges detailed later in this document are based upon INCO's initial estimates of the disk space and bandwidth required for this site. However, this estimate may need to be refined during the specification and development of the site.

### 6.4. Website Accessibility and Usability Standards: W3C and Equality Act

It is INCO's belief that Billerica's public website is likely to be accessed by a wide variety of users, with a corresponding variety of capabilities – both personally and in terms of the hardware/software that they are using. It is, therefore, essential that the site can be accessed by any user, from any computer and with any browser. Failure to provide a cross-platform/cross-browser site can only limit the number of users able to use the site and therefore limit its effectiveness. This is also a legal requirement of the Equality Act.

The website's design will be built to comply, as far as possible, with W3C standards and Web Content Accessibility Guidelines to assist disabled users of the site (Disability Discrimination Act/Equality Act). Internet Explorer 10 and below will not be supported. The website will be mobile/handheld device friendly (androids, tablets, iPhones, iPads, etc.).

## 7. Implementation Timeframe

We will work with you to agree a realistic timeframe for the “go live” date of the system so that your timescales are met from the date of the contract being awarded. The website project will be project managed accordingly with a view to meeting these timeframes.

An estimated completion timescale for this project is circa 4-5 months.

The timescale will, however, be dependent upon you providing content (where applicable) on time and in a usable electronic format, along with timely feedback during the design and development process.

## 8. Charges

### 8.1. Design, Development and Implementation

- Bespoke design and development of Billericay Teaching School Alliance sub-site with responsive design for smart phone / tablets.
- Bespoke design and development of Billericay Teaching School Alliance Training Tracking System
- Upload of sample content as outlined in this proposal
- Testing and implementation
- Training

**Total Cost:** **£ 25,000.00 + vat**

### 8.2. Annual Hosting and Application Support

The annual hosting fees quoted below include; hosting (2GB Disk space and 15GB monthly data transfer allowance), support via e-mail for server management and software issues, technical support, security patches during the subscription period

**Annual Website / Hosting Cost:** **£ 750.00 + vat**

**Annual Application Support Cost:** **£ 3,750.00 + vat**

### 8.3. Other Charges, & VAT

Unless you wish to register additional domain names or optional extras, INCO do not anticipate other additional charges, unless otherwise mentioned or specified during the specification stage, occurring. If you would like a quote/further information about any of our other services, please feel free to contact us. All charges EXCLUDE VAT unless otherwise stated. E&OE.

## 9. Acceptance of proposal

If you accept this proposal please confirm by selecting the options you wish to order and then signing and returning both pages of this section of the document including the options selection and signature page.

### 9.1. Development Charges

Description	Charge
System Design and Development	£ 25,000.00 + vat

#### 9.1.1. Stage Payments

Description	Monthly Charge
Stage 1 - Deposit	£ 10,000.00 + vat
Stage 2	£ 5,000.00 + vat
Stage 3	£ 5,000.00 + vat
Stage 4	£ 5,000.00 + vat
<b>Enter Total:</b>	£ 25,000.00 + vat

### 9.2. Annual Costs

Description	Annual Charge
Application Support (15% of Development Charge)	£ 3,750.00 + vat
Website / System Hosting	£ 750.00 + vat

## 10. Order Acceptance

I accept this proposal and would like INCO to carry out this project as per details outlined in this document entitled “Proposal for the Design and Development of the Billerica Training Tracking System V1.0”, dated 6<sup>th</sup> March 2017.

Images, Graphics & Text: I also confirm on behalf of Billerica Teaching School Alliance that we either own copyright to, or have obtained permission from the relevant copyright owner to use, all text, images, graphics, etc. which we have requested that INCO include in our website. I further confirm on behalf of Billerica Teaching School Alliance that we either own all trademarks, or have obtained permission from the relevant trademark owner to use, in all text, images, graphics, etc. which we have requested that INCO include in our website. I also confirm on behalf of Billerica Teaching School Alliance that we accept INCO’s standard terms and conditions which are available online at <http://www.inco-digital.com/>.

Annual Hosting/Application Support charges are payable when site goes onto the stage website/URL for Billerica Teaching School Alliance to view. Payment for the “Design and Development options” is required per the stage payment schedule above.

Signed by: ..... on behalf of Billerica Teaching School Alliance:  
(PRINT NAME)

Signature: ..... Date: .....

Position: .....

Signed by: ..... on behalf of INCO:

Signature: ..... Date: .....