Request For Information

Training Course Management Solution (AccessPoint)

Version number 3

Table of Contents

[1. Introduction 3](#_Toc153394118)

[2. Who we are 3](#_Toc153394119)

[3. Background to the requirement 4](#_Toc153394120)

[4. Outline of requirements: Training courses 5](#_Toc153394121)

[5. Account registration 5](#_Toc153394122)

[6. User profile 5](#_Toc153394123)

[7. Customer profile 6](#_Toc153394124)

[8. Create/update/archive own customer profile 6](#_Toc153394125)

[9. Training course booking journey/form for users 6](#_Toc153394126)

[10. Registering onsite training course delegate attendance 7](#_Toc153394127)

[11. Admin tasks: course creation, scheduling, and resource management 7](#_Toc153394128)

[12. Admin Tasks 7](#_Toc153394129)

[13. Associate (Trainer) profiles and management 8](#_Toc153394130)

[14. Training history and certificates for delegates 9](#_Toc153394131)

[15. Payment gateway 9](#_Toc153394132)

[16. Integration with finance system 9](#_Toc153394133)

[17. Fields and forms functionality 10](#_Toc153394134)

[18. Services marketing 10](#_Toc153394135)

[19. Automated notifications and processes 10](#_Toc153394136)

[20. Document management 11](#_Toc153394137)

[21. Role Based Access Control (RBAC) 11](#_Toc153394138)

[22. Usability, compatibility, and accessibility 12](#_Toc153394139)

[23. Technology, security, and hosting 13](#_Toc153394140)

[24. Legislation and assurance 13](#_Toc153394141)

[25. Service management 14](#_Toc153394142)

[26. Questions to the supplier 15](#_Toc153394143)

[27. Glossary of terms 22](#_Toc153394144)

1. Introduction
   1. The College is conducting early market engagement in the form of this Request for Information (RFI) to explore potential solutions that could meet its requirements as set out in this document. Contained within this document is a background to the project and the requirements along a series of questions that we seek responses to from interested parties. The responses to this document will be used to inform an Outline Business case for the project and help inform the future direction we take both in terms of the solution and any future procurement process. By responding to this RFI, should your responses be of interest to the College we may in the future seek further engagement with you in order to better inform our approach to any future procurement.
   2. The College is seeking a supplier to provide a training course booking and management solution for our onsite/online/offsite/hybrid training courses.
   3. Suppliers are requested to review this RFI, provide their responses in the ‘Questions to the supplier’ section at the bottom of this document.
   4. Suppliers are requested to complete the Appendix A Excel document ‘AccessPoint RFI- Schedule of Rates V1’.
   5. Please complete the supplier response at the end of this document if you have any questions please contact [CPU.Tenders@college.police.uk](mailto:CPU.Tenders@college.police.uk) , by **22 January 2024**.
   6. The deadline for supplier submissions is **26th January 2024.**
2. Who we are
   1. The College of Policing (the “College”) is the professional body for policing in England and Wales. Working together with everyone in policing, we share the skills and knowledge officers, and staff need to prevent crime and keep people safe.
   2. We set the standards in policing to build and preserve public trust and we help those in policing develop the expertise needed to meet the demands of today and prepare for the challenges of the future.
   3. We have a mandate to set standards in professional development, including codes of practice and regulations, to ensure consistency across the 43 Home Office forces in England and Wales.
   4. We also have a remit to set standards for the police service on training, development, skills, and qualifications, and we will provide maximum support to help the service implement these standards.
   5. Further information is available on the College website: [Working together | College of Policing](https://www.college.police.uk/)
   6. The College has four locations:
   * Government hub, Canary Wharf, London
   * Ryton-on-Dunsmore near Coventry
   * Harperley Hall, Crook, Co. Durham
   * Harrogate, North Yorkshire
3. Background to the requirement
   1. The College has two sites where we host delegates and we generate revenue by hosting events, training courses and offer onsite hotel accommodation. All onsite events, courses and hotel stays have the option for delegates to access our onsite catering services.
   2. Our onsite hotel accommodation room capacity is a total of 464 rooms and 195 training, conference, and meeting rooms.
   3. In total we have on average;
      1. 47K occupancy for delegates, trainers, associates, and visitors staying in our hotel accommodation per year
      2. 2K training activities, professional events, and meetings per year
      3. 43K delegate days per year
      4. 16K delegate numbers per year
      5. 3K internal and external visitor bookings per year
   4. The College is seeking to replace our current integrated accommodation, events, and training course booking and management system. For our replacement system(s) we can consider a fully integrated or three separate solutions. Ideally if separate, integration is possible.
   5. Operationally we have at our Coventry and County Durham sites, the following onsite teams: reception, housekeeping, security, catering, and facilities site managers. Our catering team handle the ordering and preparation for food requests for hotel stays and course delegates.

1. Outline of requirements: Training courses
   1. The College has identified a series of preferred features and functionality for a training course booking and management solution.
   2. The new solution would be accessed globally by internal College staff and external people (wider public) from existing College platforms for example, the College Website [Working together | College of Policing](https://www.college.police.uk/)
2. Account registration
   1. Users need to be able to register an account with password reset facility. Once they have created a user and customer profile, our publicly available services should be able to be viewed/ searched and bookings made.
   2. College admin teams, internal College staff and external users will also create bookings on behalf of other users.
   3. For internal College users, login would ideally sync from our active directory and allow single sign-on functionality.
   4. User account verification must be implemented to prevent unauthorised access and protect sensitive information.
3. User profile
   1. A user record containing personal details for any user that wants to access the solution to search, view and book our courses and includes the following:
      1. Create/update/archive own profile
      2. Create/update/archive another user’s profile
      3. View own full booking and transaction history
      4. View another user’s booking and transaction history
      5. Search and make bookings on behalf of other registered users and a way to validate the correct person is returned in the search
4. Customer profile
   1. A customer profile containing details for any individual or organisation that will be invoiced and charged for College services. To include the following:
5. Create/update/archive own customer profile
   1. All expenditure shown with transaction history and status
   2. Create/ update/ archive someone else’s customer profile
   3. View someone else’s expenditure
6. Training course booking journey/form for users
   1. A booking journey for users should include:
      1. Search facility with ability to find all training courses with availability status
      2. Calendar view displaying any own/other user’s booked training courses with ability to search
      3. Can book for self and/or others from calendar view or search results including accessibility requirements
      4. Can book catering or hospitality for onsite training courses
      5. Can define if training courses require internal admin team/ finance approvals prior to bookings being confirmed, depending on training course
      6. Modify/ cancel reservations/ substitute/ transfer people on bookings
      7. Apply cancellations with associated fees and reasons
      8. View availability and capacity on all training courses
      9. Access waiting list functionality
      10. View eligibility and pre-course requirements
      11. View general FAQ section
      12. Track purchase orders and invoices, with ability to print
      13. Receive automated notifications for booking status changes
7. Registering onsite training course delegate attendance
   1. Manage onsite course delegate attendance/ registration and can view any accessibility requirements
   2. Manage attendance lists with ability to print
8. Admin tasks: course creation, scheduling, and resource management
   1. Training courses
      1. Delegates are not expected to complete or ‘sit’ training courses within the solution.
      2. Training course types to create, manage and book:
         1. Onsite - delegates and trainers are all physically present in a training room at a College site
         2. Offsite – delegates and trainers are physically present at externally hosted at external venues not on College sites
         3. Online – training course is remotely delivered and attended online
         4. Hybrid –delegates/ trainers may be onsite or online for the same course
9. Admin Tasks
   1. No course content or question bank functionality is required in the solution.
   2. This is done outside of the solution or delegates attend in-person onsite.
   3. We require courses to be created and booked for the purpose of tracking payment, scheduling, and room and people resource management only.
   4. Our Admin Teams are responsible for the planning and administration of our courses. Their needs include:
      1. Create training course bookings for another person and/or multiple people
      2. Manage user, customer, and trainer/associate profiles
      3. Define and manage the training rooms
      4. Have a flexible method to define and manage different rates, tariffs, and block pricing packages for training courses
      5. Control of training course details and when they are live on the system to be searched and/or booked
      6. Define which training courses are searchable or self-bookable
      7. Create and schedule large numbers of training courses
      8. Individually and bulk assign training courses against rooms
      9. Individually and bulk assign trainers/associates and/or delegates onto training courses
      10. Ensure min/max capacity of training courses against delegate numbers are validated
      11. Be warned of booking clashes when rooms are already in use
      12. Be warned of booking clashes delegates already booked
      13. Flexible calendar views where bookings can be made/searched
      14. View what trainers/associates and/or delegates are booked onto a course
10. Associate (Trainer) profiles and management
    1. Our admin teams are responsible for managing our internal trainers and external associates on the system. Currently we have 1,600 trainers who are external to the College.
    2. Associates are independent of the College and are organised according to multiple subject areas.
    3. To manage our trainers and associates we require:
       1. Admin teams and users to create and manage trainers and associate profiles e.g., vetting clearance level, vetting expiry dates, rates, allocated days, subject area, time logging
       2. Admin teams can schedule trainers and associates onto courses as people who are delivering the course
       3. Associates can be organised against more than one subject area of expertise
       4. Admin teams can manage the subject areas with multiple subgroups
       5. Different associate and trainer types can be created
       6. Calculate price charges for trainer and associate delivery
11. Training history and certificates for delegates
    1. A training history record for delegates that have attended training courses and includes:
       1. History of training courses booked and course status
       2. Admin team can set pass/fail result
       3. Ability to attach certificates/documents against a course and ability to print
12. Payment gateway
    1. We require a secure payment gateway within the solution for users to make payments that includes:
    2. Wide range of payment methods including recognised payment gateway service providers
    3. Robust security measures and complies with relevant industry standards and regulations
    4. Payment can be made depending on event type and user role OR Integration with [GOV.UK Pay (payments.service.gov.uk)](https://www.payments.service.gov.uk/)
13. Integration with finance system
    1. Our current system integrates with a Home Office finance solution ‘METIS’ (an Oracle Fusion Application) so that the College finance team can process invoices and payments for training courses.
    2. There are four categories of master data exported from METIS and imported to our existing solution: event information, items, and price to be charged, delegate details and organisation to be charged.
    3. This means when new internal staff and organisations are created on METIS, they will then exist in our current system. When our current system creates booking and invoice information for training course, these are exported to METIS. The finance team then complete the payment process on METIS.
    4. The solution will be required to handle:
       1. Import and export of XML files
       2. Data validation specific fields
       3. Minimum mandatory fields
       4. Configurable import and export frequency
       5. P11D - benefits in kind
    5. For some associates and internal staff attending their own site, we must account for benefits in kind. The solution should be able to:
       1. Allow us to identify/calculate internal staff that have utilised catering at their own site
       2. Identify the individuals that are impacted by benefits in kind and can be run as a report
14. Fields and forms functionality
    1. Ability to customise existing fields
    2. Can create new fields and descriptions with different formats e.g., text / numeric/ dates / prices / drop down lists
    3. Mandatory fields can be set
    4. Ability to query and create reports on the metadata.
    5. Audit logs generated for any updates made
15. Services marketing
    1. A ‘What’s On’ page that allows all users to view upcoming training courses, with detailed information that includes:
       1. Management of course listings content
       2. Management of course categorisation for easy searching
       3. Bookings can be made from this screen
       4. Users can view course availability
16. Automated notifications and processes
    1. Automated notifications and processes to reduce manual processes for operations and admin teams, such as:
       1. Real-time notifications and reminders to users/teams for tasks
       2. Real-time updates for status changes of course bookings and activity
       3. Ability to have post-event delegate feedback
       4. Notification types e.g., email, SMS/text, push, in-app OR integration with [GOV.UK Notify (notifications.service.gov.uk)](https://www.notifications.service.gov.uk/)
       5. Ability to ensure that any personal or sensitive information included in notifications is transmitted/stored securely to protect user privacy and comply with relevant data protection regulations
17. Document management
    1. File upload such as purchase orders, invoice, booking forms, certificates against bookings
    2. File types to include - PDF, Excel and Word
    3. Schedulable automation for file deletion
    4. Mail merge to bulk send information to users
    5. Includes automatic antivirus scanning for file upload/download
    6. Reporting analytics
    7. For all activity we require:
       1. Visual and adaptable Management Information (MI) dashboard
       2. All metadata to be available, queryable and exportable in reporting analytics
       3. Some standard reports to support operational needs e.g., course attendees list
       4. College customisation of reports for analysis and management information (MI) reporting
       5. Ability to implement data controls and measures. e.g., ability to delete some user profile data after specified time
18. Role Based Access Control (RBAC)
    1. All solution functionality should include RBAC and the following:
       1. Ability to ensure that authorised users are granted access to appropriate information and functionality based on their role
       2. Customisable roles to be defined and associated with specific functionalities and data access for different users
       3. Assignment of roles to individuals or groups of users
       4. Control of roles at system or feature level
       5. Role hierarchies that are easy to manage/apply
19. Usability, compatibility, and accessibility
    1. Solution compatible with modern standards-based browser technologies and be fully accessible across mobile, tablet and desktop devices running vendor-supported operating systems as listed here [Designing for different browsers and devices - Service Manual - GOV.UK (www.gov.uk)](https://www.gov.uk/service-manual/technology/designing-for-different-browsers-and-devices)
    2. Customisable to reflect College branding
    3. Good customer/ delegate UX – system should be clear, intuitive, and easy to use for users
    4. Platform should work with the following combinations of assistive technologies listed here [Testing with assistive technologies - Service Manual - GOV.UK (www.gov.uk)](https://www.gov.uk/service-manual/technology/testing-with-assistive-technologies)
    5. Solution customisable to support our compliance with the Equality Act 2021, specifically:
       1. ‘Text to Speech’ and ‘Speech to Text’ functionality
       2. Modify text size
       3. Colour overlay/screen colour
       4. Content that gives consideration to the language used, i.e. gender neutral
       5. Solution will be fully compliant with [Web Content Accessibility Guidelines (WCAG) 2.2 (w3.org)](https://www.w3.org/TR/WCAG22/) AA standard and supplier to provide documentary evidence in support of this. Where there are areas of non-compliance a detailed roadmap and timescales for remediation work to be complete will be provided
       6. Solution to make available an accessibility statement to all users from all pages or areas within the system, usually within the footer, detailing compliance status. The accessibility statement will follow the guidelines as outlined at [Sample accessibility statement (for a fictional public sector website) - GOV.UK (www.gov.uk)](https://www.gov.uk/government/publications/sample-accessibility-statement/sample-accessibility-statement-for-a-fictional-public-sector-website)
       7. The product and supplier should follow the Agile delivery methodology, and work to adhere to the [Service Standard - Service Manual - GOV.UK (www.gov.uk)](https://www.gov.uk/service-manual/service-standard)
20. Technology, security, and hosting
    1. Our requirement is for a system that can be used securely by both internal and external users. We do not prejudge how this might be achieved. If the system runs outside our infrastructure, it must be established how internal account information is passed to it without risk, if it runs inside our infrastructure it must be established how external users access the interface. The College infrastructure is a physical network with secure links to M365 and Azure resources in a private tenant.
21. Legislation and assurance
    1. Any system used by the college must meet the following security assurance standards:
       1. Uses Multi-factor authentication for administration users if it is implemented outside the College network.
       2. Cyber Essential plus and/ or is ISO27001 certificated
       3. The application is tested using [OWASP Application Security Verification Standard](https://owasp.org/www-project-application-security-verification-standard/) best practice, to mitigate most common web based attacks <https://owasp.org/www-project-top-ten/>
       4. Comply with the NCSC 14 Cloud Security Principles if delivering a cloud based solution
       5. The successful supplier must provide information detailing their compliance with UK GDPR. This should include but not limited to, the security measures employed by the successful supplier where personal data is stored (physical and digital measures); the policies and procedures in place to support the facilitation of UK GDPR compliance; the training provided to staff and its frequency, the ability to comply with individual’s rights under UK GDPR and the general compliance with the Data Protection principles listed under Article 5 of the GDPR
       6. Data stored/platform and data handling solely hosted in UK, in-line with UK policing policies relating to data storage and handling.
       7. CHECK Green Light ITHC completed annually on platform or with each incremental change to the system, or permission for the College to do this (may include testing the hosting environment). All findings must be made available to the College with a summary of what hasn’t been fixed and a plan to rectify where appropriate.
       8. There is an audit of data access, amendment, deletion, and export.
       9. System is stable and there are fall back and recovery processes in place.
       10. The successful supplier must provide information on data management and security in their bids, and supply details about team members who are vetted. If the supplier is required to access any information classified as OFFICIAL or higher, then the successful supplier will be required to be vetted to NPPV Level 2 or Level 3 as required.
       11. If hosting is provided by the supplier, management, maintenance and support of the hosting environment would be the responsibility of the supplier
       12. As part of the requirement documents and evaluation requirements, we often stipulate that the if successful, the supplier must provide the following documents and that failure to provide these documents will mean that the supplier will not be awarded the contract and they will forfeit it to the second successful bidder.
       13. The documents we would like to request are:

* DP protection policy
* Privacy notice
* Data Retention Policy
* Data Subject Consent form (where applicable)
* Supplier Data Processing Agreement (where applicable)
* Data Breach response and notification

1. Service management
   1. Audit logs should be maintained by the system to keep track of all data access, amendments, deletions, and exports. Audit logs should not be amendable and should be retained in line with an agreed Data Retention period
   2. Agree to a Service Level Agreement (SLA) documenting incident problem and change management processes, response time, core business hours, and business continuity / disaster recovery processes
   3. Suppliers should follow ITIL 4 guiding principles for service management when transitioning to and during business as usual.

1. Questions to the supplier

Please provide answers to the following questions and return your response to the following email address by the response deadline on the front cover of this document [CPU.Tenders@college.police.uk](mailto:CPU.Tenders@college.police.uk)

|  |  |
| --- | --- |
|  | Please provide a brief introduction to your company: |
| [Please insert response] | |
|  | Please provide the name of the solution you offer: |
| [Please insert response] | |
|  | Is this your solution or do you provide a third-party solution? |
| [Please insert response] | |
|  | What would a typical timeframe be for the implementation of your solution and what would the project phases look like? |
| [Please insert response] | |
|  | Please provide information on your development and release path schedule for the next 5 years. |
| [Please insert response] | |
|  | How would you support us if we require new features and functionality that are not on your current roadmap in the future? |
| [Please insert response] | |
|  | How would you handle data migration from our current system? Please provide case studies and examples if possible. |
| [Please insert response] | |
|  | What SLA’s do you typically work to? |
| [Please insert response] | |
|  | Further to the functionality requirements detailed in this document, are there any other features or functionality that we have not listed that you believe may be of value to the College?  Please provide an overview of why these features or functionality should be built into our final specification. |
| [Please insert response] | |
|  | As we are investigating 3 areas (Hotel, Events, and Training course management system) to support our business processes, Do you have any existing partnerships with other hotel/ accommodation or training course solutions? |
| [Please insert response] | |
|  | Does your solution provide or integrate with automated check-in screens for events arrivals and departures? If it does integrate with another supplier, do you have existing partnerships with a supplier? |
| [Please insert response] | |
|  | Does your organisation sit on any Public Sector Frameworks that would be accessible to the College and would be suitable for Procuring this type of requirement? If so, please can you provide the detail of the Framework below. |
| [Please insert response] | |
|  | Please provide any feedback on the specification we have provided. For example, is there sufficient information for you to understand our needs? If not, what data would you require? Can clarity be provided in any sections where you feel the information is ambiguous? |
| [Please insert response] | |

|  |  |  |
| --- | --- | --- |
| Using the table below, please identify if the system you offer provides the required functionality as set out in sections 4 – 25. | | |
| **No** | **Requirements** | **Does your solution provide this functionality?**  **(Delete as applicable)** |
|  | Account registration | Y/N |
|  | User profile | Y/N |
|  | Customer profile | Y/N |
|  | Trainer/ associate profiles and management | Y/N |
|  | Training course booking journey/ form for users | Y/N |
|  | Registering onsite training course delegate attendance | Y/N |
|  | For in-person attendee arrivals management - do you provide any QR code scanning or alternatives? | Y/N |
|  | Admin team tasks: course creation, scheduling, and resource management. Training courses | Y/N |
|  | Training history and certificates for delegates | Y/N |
|  | Onsite Operations tasks – reception/security | Y/N |
|  | Onsite Operations tasks – facilities | Y/N |
|  | Onsite Operations tasks – housekeeping | Y/N |
|  | For some courses, delegates can opt in for meals in our canteens and request hospitality in training rooms. Does your solution have any catering functionality? | Y/N |
|  | Onsite Operations tasks – catering/hospitality | Y/N |
|  | If dietary requirements are set in the user profile, can it auto pull through to the catering orders screens? | Y/N |
|  | When the catering team are reviewing orders, is there a visual or system prompt to indicate it contains dietary requirements? | Y/N |
|  | Currently delegates with pre-paid meals are given physical meal cards when they arrive at reception, which are shown when they enter the restaurant. Does your solution have a method to replace this process e.g. QR code scanning? | Y/N |
|  | Admin team management tasks: Course creation, and scheduling and resource management including different College event types | Y/N |
|  | Freeze period- can your solution allow our admin teams to apply a predefined time frame where users cannot book? | Y/N |
|  | Trainer/ associate/ speaker profiles and management | Y/N |
|  | When booking delegates with accessibility requirements, is there a visual or system prompt to indicate they have accessibility requirements? | Y/N |
|  | Can your system validate event details against delegate booking details, eg, accessibility requirements, when users book an event? | Y/N |
|  | Delegate event and booking history | Y/N |
|  | Payment gateway | Y/N |
|  | Does your system have the capability to integrate with Oracle for example utilising Rest API with JSON protocol or other suitable methods? | Y/N |
|  | P11D - benefits in kind | Y/N |
|  | Fields and forms functionality | Y/N |
|  | Services marketing | Y/N |
|  | Automated notifications and processes | Y/N |
|  | Document management | Y/N |
|  | Reporting analytics | Y/N |
|  | Is your solution compatible with google analytics or similar product? | Y/N |
|  | We would be keen to analyse end to end (E2E) customer activity from initial enquiry to booking invoicing/ payment for management reporting and wider market research purposes.  Does your solution have the capability to do this | Y/N |
|  | Role Based Access Control (RBAC) | Y/N |
|  | Usability, compatibility, and accessibility | Y/N |
|  | How would you handle data migration from our current system? Please provide case studies and examples if possible. | Y/N |
|  | Technology, security, and hosting  Legislation and assurance | Y/N |
|  | Service Management | Y/N |
|  | Is your data hosted inside the UK? | Y/N |

1. Glossary of terms

|  |  |
| --- | --- |
| **Term** | **Definition** |
| 2FA | 2 Factor Authentication - a security feature you possess via app or text message, as opposed to one you know like a password |
| API (Application Programming Interface) | API stands for Application Programming Interface. It is a set of rules and protocols that allows different software applications to communicate and interact with each other. APIs enable the exchange of data and functionality between systems, facilitating seamless integration and interoperability. |
| Associate | Associates independent staff of the College and bring specialist skills to complement those of our staff. They include: Trainer Specialist Assessor QAer - quality auditor assessor Tutor Coaches Mentors Peer Reviewers Subject Matter Experts |
| COTS | Commercial off-the-shelf |
| Customer | Individual or organisation that will be invoiced and pay for College services |
| Delegate | Person attending a training course |
| Function | Service at an EVENT provided by an ASSESSOR |
| Journal Format | Journal Format Data refers to data recorded in a chronological sequence, similar to a journal or log. It is structured with each entry representing a single event or transaction, accompanied by timestamps and relevant details. Journal format data is commonly used for auditing, tracking changes, and data synchronization between systems. |
| METIS | Home Office finance solution (Oracle Fusion Application) that our solutions must integrate with |
| PD11 - Benefits in Kind | Accommodation or other non-financial benefit claimed by an associate or staff member |
| Pool | Grouping of ASSOCIATEs performing the same FUNCTION |
| RBAC | Role Based Access Control. - function to provide specific privileges to user groups/types |
| XML (Extensible Markup Language) | XML stands for Extensible Markup Language. It is a versatile and widely used markup language that defines rules for encoding documents in a human-readable format. XML is often used for data representation, configuration files, and data exchange between systems due to its flexibility and self-descriptive structure. |

**About the College**

We’re the professional body for the police service in England and Wales.

Working together with everyone in policing, we share the skills and knowledge officers and staff need to prevent crime and keep people safe.

We set the standards in policing to build and preserve public trust and we help those in policing develop the expertise needed to meet the demands of today and prepare for the challenges of the future.

**college.police.uk**