Concept of Operations
Levi Swims – Phase 1

Author: Alec Fearon, Version 01, 21 November 2025   Transparency label: AI-assisted

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1. Introduction

This Concept of Operations (ConOp) describes **Phase 1** of the Levi Swims operational system.

Levi Swims provides swimming lessons to children and young people, with a particular emphasis on those who have special educational needs and disabilities (SEND). Lessons are delivered one-to-one or in small groups and are tailored to individual needs.

In Phase 1, the operational system is deliberately simple. Parents and carers learn about Levi's services via a WordPress.com website, request lessons through a booking form, and receive personal confirmation directly from Levi. Bookings are recorded in a shared bookings calendar, implemented as spreadsheet in Google Workspace. Invoicing and payments are managed manually through an outsourcing arrangement with Community Support Team (CST), who use their own accounting tools.

Phase 1 does **not** include automated booking, live availability display, integrated payment processing, nor automated reminder functions. These capabilities are recognised as desirable and are expected to appear in later phases. Future enhancements are expected to include:

- A live availability calendar visible to parents and carers.
- Automated booking and confirmation workflows.
- Integrated payment facilities for one-off payments and direct debits.
- Automated reminders and notifications.
- Tighter integration between the website and CST's accounting processes.

These future capabilities remain **out of scope** for Phase 1 and are described only to provide context. Phase 1 defines the currently required operational system: its purpose, boundary, actors, use cases, processes, scenarios, and key data-protection considerations.

2. System Purpose and Scope

2.1 Purpose

The Phase 1 system exists to:

- Provide clear information about Levi's swimming services, with particular emphasis on SEND-appropriate provision.
- Enable parents and carers to request lessons in a simple, predictable way.
- Allow Levi to review, confirm, and manage bookings in a controlled manner.
- Support CST in issuing invoices and tracking payment status on Levi's behalf.
- Maintain a basic level of data protection appropriate to working with children and SEND-relevant information.

2.2 System Boundary

Inside the Phase 1 system boundary

- Public information about Levi Swims and its services, published on the WordPress.com website.
- The booking request function provided via the website form.
- Levi's email inbox, as the controlled entry point for booking requests and booking-related communication.
- The bookings calendar function, which records confirmed sessions, availability, and changes. In Phase 1 this function is implemented using a Google Workspace spreadsheet and shared between Levi and CST.
- The method used to store essential safety-relevant notes for lesson planning (for example, secure notes in Google Workspace).

Outside the Phase 1 system boundary

- Parents and carers.
- Children and young people attending lessons.
- Community Support Team (CST) as an organisation and its internal systems (e.g. Xero).
- Payment providers and bank accounts.
- Level Water and other partner organisations.
- The physical pool facilities and related operational controls.

2.3 Assumptions and Constraints

Key assumptions:

- Parents and carers have access to the internet and email.

- Levi has reliable access to the WordPress.com backend, email, and Google Workspace.
- CST continues to provide invoicing and accounting support using their existing tools.

Key constraints:

- No automated booking, payment or reminder tooling is used in Phase 1.
- The WordPress.com site does not store booking data; booking requests are delivered by email.
- The bookings calendar is maintained manually and has no automated interfaces to the website or CST's accounting system.

3. Actors and External Stakeholders

3.1 Parents and Carers

Parents and carers arrange lessons on behalf of children and young people. They:

- Access information about Levi's services via the website.
- Submit booking requests through the website form.
- Communicate with Levi by email or phone to clarify needs and confirm arrangements.
- Receive invoices from CST and arrange payment.

3.2 Children and Young People

Children and young people receive lessons. Their needs, abilities, and circumstances influence how lessons are planned and delivered, with many learners having SEND-related requirements.

3.3 Levi (Instructor and Operator)

Levi:

- Provides swimming lessons.
- Manages booking requests, confirmations, cancellations, and rescheduling.
- Maintains the bookings calendar.
- Communicates with parents and carers.
- Provides CST with information required for invoicing.

3.4 Community Support Team (CST)

CST:

- Acts as Levi's accounting and administrative support.
- Issues invoices through their accounting system (Xero).
- Tracks payments and notifies Levi when payment is received.
- Holds some client data within their own systems.

3.5 Partner Organisations

- **Level Water** and other partners may refer families or provide funding for lessons. They are not direct users of the Phase 1 system but are relevant as external stakeholders.

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4. Use Cases (Phase 1)

Use cases are described concisely as actor–system interactions at the boundary.

UC01: Discovering the Service

A parent or carer searches for swimming lessons and visits the website. They read about Levi, the lesson types (including SEND-focused provision), pricing, and how the booking process operates. If they need clarification, they contact Levi using the contact details provided.

UC02: Submitting a Booking Request

A parent or carer submits a booking request using the website form. The form captures essential details such as parent contact information, child's name and age, desired session type or block, preferred times, and optional notes. The form sends the request to Levi's email inbox. The website does not retain booking data in its backend.

UC03: Reviewing and Clarifying the Request

Levi reviews the booking request email and decides whether the information is sufficient to proceed. If any details are missing, ambiguous, or unclear (including SEND-related needs), he contacts the parent or carer to obtain clarification before confirming a booking. This interaction may occur by email or phone.

UC04: Resolving Scheduling Conflicts

Levi checks the bookings calendar to see whether the requested time is available. If there is a conflict, he contacts the parent or carer to propose an alternative time. Once they agree, he proceeds towards confirmation. The bookings calendar used here is the spreadsheet-based calendar within the system.

UC05: Assessing SEND-Related Needs Before Confirmation

Where the request or subsequent discussion indicates SEND-related needs or other factors affecting safety or lesson planning, Levi gathers sufficient information to determine whether he can deliver suitable and safe lessons in the proposed context. This may affect session timing, structure, or whether the booking can proceed.

UC06: Confirming the Booking

Once timing, session type, and any SEND-related considerations are clear, Levi confirms the booking with the parent or carer by email or phone. He then records the agreed sessions in the bookings calendar. Alternatively, if the parent does not respond to clarification attempts, Levi may send a reminder and eventually release the slot if no reply is received.

UC07: Invoicing and Payment

For each confirmed block of lessons, Levi sends CST the information needed for invoicing: parent contact details, block length, start date, and any relevant notes. CST uses this information to raise an invoice in their accounting system and send it to the parent or carer. When payment has been made, CST inform Levi by marking the bookings calendar accordingly.

UC08: Handling Invoicing Exceptions

If a booking is cancelled after an invoice has been raised, Levi informs CST so they can amend or void the invoice as appropriate. If CST notifies Levi that payment has not been received by the due date, Levi decides whether lessons can start or continue and communicates with the parent or carer accordingly.

UC09: Managing Cancellations and Rescheduling

Parents and carers contact Levi directly to cancel or reschedule sessions. Levi updates the bookings calendar to reflect the change and confirms the new arrangements with the parent or carer. Where changes affect previously invoiced sessions, he also informs CST.

UC10: Provider-Initiated Changes

If a lesson cannot proceed due to pool closure, illness, or other unavailability, Levi contacts affected parents or carers promptly, offers alternative times when possible, and updates the bookings calendar accordingly.

UC11: Managing Sensitive Information

Where parents share more information than is necessary (for example detailed medical or behavioural reports), Levi identifies what is required to deliver safe lessons and what is not. He reads only what is necessary, explains where possible that unnecessary information will not be retained, and ensures non-essential data is deleted.

UC12: Storing Essential Safety Notes Securely

Where information is required for safe lesson planning and delivery (for example specific safety considerations or stable SEND-related needs), Levi records essential notes in a secure location within the system boundary, such as a protected document in Google Workspace. Notes are kept concise and relevant.

UC13: Managing Repeat Block Bookings

Towards the end of a block of lessons, Levi contacts the parent or carer to ask whether they wish to continue. If they do, he agrees new session times, updates the bookings calendar, and notifies CST so that a new invoice can be raised.

UC14: Correcting Calendar Errors

If Levi identifies an error in the bookings calendar (such as a double booking or a missing entry), he corrects it and communicates any necessary changes to affected parents or carers and CST.

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5. Functional Behaviour

This section summarises key internal functions that support the use cases.

5.1 Website Information Function

The WordPress.com site presents static and structured content describing Levi, available lesson types, SEND-relevant information, pricing, and contact details. This supports UC01 and provides context for all subsequent interactions.

5.2 Booking Request Function

The website form collects essential booking details and sends them by email to Levi. The site does not store booking data in its backend. This supports UC02 and provides the entry point for UC03.

5.3 Email Handling Function

Levi's email inbox is the primary channel for receiving booking requests, requesting clarification, confirming sessions, and communicating changes. It supports UC03, UC04, UC05, UC06, UC09, UC10, UC11, and UC13.

5.4 Bookings Calendar Function

The bookings calendar stores confirmed session dates and times and is used to manage availability and avoid conflicts. In Phase 1, this function is implemented as a spreadsheet stored in Google Workspace and shared between Levi and CST. All updates are performed

manually by Levi and, to record payments, CST. There is no automated interface to other system components. This function supports UC04, UC06, UC09, UC10, UC13, and UC14.

5.5 Safety Notes Function

Essential safety-related notes and stable SEND-relevant information are stored in a secure repository within the system boundary (for example protected documents in Google Workspace). Notes are linked logically, not technically, to bookings. This function supports UC05, UC11, and UC12.

5.6 CST Interface Function

The system supports Levi in providing clear booking information to CST and receiving payment status updates. The interface is implemented manually via email and the shared calendar. CST's own systems (for example Xero, their web hosting, and security layers) remain outside the system but are essential dependencies.

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6. Operational Processes (Phase 1)

6.1 Process: Handling a New Booking

Purpose: To accept, assess, confirm, and record a new block of lessons.

Sequence (high level):

1. Parent or carer discovers the service (UC01).
2. Parent submits booking request via website form (UC02).
3. Levi reviews the request and seeks clarification if required (UC03).
4. Levi checks the bookings calendar and resolves any conflicts (UC04).
5. Levi assesses SEND-related needs where applicable (UC05).
6. Levi confirms the booking with the parent or carer and records it in the calendar (UC06).
7. Levi sends booking details to CST for invoicing (UC07).

6.2 Process: Managing Cancellations and Rescheduling

Purpose: To keep the bookings calendar consistent with real-world plans and financial status.

Sequence:

1. Parent or carer requests cancellation or a change (UC09).
2. Levi assesses impact on the bookings calendar and future lessons.
3. Levi updates the calendar (UC09 / UC14).
4. Where necessary, Levi informs CST about changes to invoiced sessions (UC08).

6.3 Process: Managing Invoicing and Payment Status

Purpose: To ensure that invoicing and payment status are aligned with booked sessions.

Sequence:

1. Levi sends CST the details of confirmed bookings (UC07).
2. CST issues invoices via their accounting system and notifies Levi on payment (UC07).
3. If changes occur after invoicing, Levi informs CST so they can amend invoices (UC08).
4. If payment is not received by the due date, CST informs Levi via the bookings calendar and he decides on next steps with the parent (UC08).

6.4 Process: Managing Sensitive Information and Safety Notes

Purpose: To handle sensitive information in a way that supports safe lessons while minimising data retention.

Sequence:

1. Parent may include sensitive information in a booking request or follow-up message.
2. Levi identifies what information is essential to safe lesson delivery and what is not (UC11).
3. Essential notes are recorded securely in the safety notes function (UC12).
4. Nonessential sensitive information is not retained.

6.5 Process: Managing Repeat Block Bookings

Purpose: To support continuity of lessons where families wish to continue.

Sequence:

1. As a block of lessons nears completion, Levi contacts the parent or carer (UC13).
2. If they wish to continue, new dates are agreed.
3. Levi updates the bookings calendar and informs CST (UC13, UC07).

7. Operational Scenarios

Scenarios describe situations that exercise or stress the Phase 1 system.

Scenario 1: Straightforward Booking

A parent submits a complete and clear booking request, there are no scheduling conflicts, and no special adjustments are needed beyond routine practice. The process follows the standard booking flow with minimal variation (UC01 to UC07).

Scenario 2: Parent Requires Clarification Before Booking

A parent is unsure whether the service is suitable for their child, or how SEND support works, and contacts Levi for clarification before submitting the form. The system must support clear communication at this stage (UC01).

Scenario 3: Incomplete Booking Information

A parent submits a booking request without providing some essential details. Levi cannot confirm the booking until clarification is obtained. This introduces delay and additional communication (UC02, UC03).

Scenario 4: Scheduling Conflict

The requested time conflicts with an existing booking in the calendar. Levi must negotiate a suitable alternative time before the booking can be confirmed (UC04, UC06).

Scenario 5: SEND-Related Adjustments Required

Information from the request or follow-up conversation indicates that specific SEND-related adjustments are needed. Levi must decide whether he can safely meet these needs and may need to propose alternative arrangements (UC03, UC05, UC06).

Scenario 6: Last-Minute Parent-Initiated Change

Shortly before a planned session, the parent requests a change or cancellation. Levi must update the calendar and confirm the new arrangement, while ensuring CST is informed if invoiced sessions are affected (UC09, UC14, UC08).

Scenario 7: Cancellation Before Invoicing

A parent cancels after a time has been agreed and confirmed but before Levi has passed details to CST. The booking is simply removed from the calendar and no invoice is issued (UC06, UC09, UC14).

Scenario 8: Cancellation After Invoicing

A booking is cancelled after CST has raised an invoice. Levi must ensure CST is informed so that the invoice can be amended or voided and payment expectations are aligned with the new situation (UC07, UC08, UC09).

Scenario 9: Repeat Block Booking

At the end of a block of lessons, the parent wishes to continue. Levi agrees new dates, updates the calendar, and ensures CST issues a new invoice for the next block (UC13, UC07).

Scenario 10: Parent Does Not Respond

Levi requests additional information to complete a booking, but the parent does not respond. After a reasonable reminder, Levi releases the provisional slot. This affects calendar use and availability (UC03, UC06).

Scenario 11: Oversharing of Sensitive Information

A parent emails detailed medical or behavioural reports beyond what is needed to plan safe lessons. Levi must extract only necessary information, avoid building unnecessary records, and ensure nonessential data is not retained (UC11, UC12).

Scenario 12: Essential Safety Information

A parent provides specific information that is necessary to deliver safe lessons (for example seizure risk, mobility constraints). Levi records succinct safety notes securely and uses them to plan lessons (UC05, UC12).

Scenario 13: Provider-Initiated Cancellation (Pool or Instructor)

A session cannot run due to pool closure, illness, or similar issues. Levi must notify families promptly, offer alternatives where possible, and update the calendar (UC10, UC09, UC14).

Scenario 14: New Information at the Pool

Immediately before a session, a parent discloses new information that materially affects safety or the nature of the session. Levi must decide whether the session can proceed and, if it does, update safety notes as appropriate (UC05, UC12).

Scenario 15: Payment Not Received

CST informs Levi that payment has not been received by the due date. Levi decides whether to start or continue lessons and communicates with the parent as needed (UC08, UC07).

Scenario 16: Calendar Error

An error in the bookings calendar is discovered (for example a double booking). Levi corrects the calendar, resolves any clashes with families, and informs CST if necessary (UC14, UC09, UC08).

8. Data, Safety, and Compliance Considerations (Phase 1)

8.1 Data Minimisation

Phase 1 is designed to collect and retain only the data necessary to arrange and deliver lessons and manage invoicing. The website form collects basic contact and booking information and does not store it in the backend; booking requests are delivered to Levi by email.

Sensitive or special category data (for example health or disability information) is handled carefully. Only information required for safe lesson delivery is retained, and notes are kept concise and relevant.

8.2 Data Storage and Security

- Booking requests are stored in Levi's email account.
- The bookings calendar and safety notes are stored in Google Workspace under CST's business-grade Google Workspace environment with appropriate security controls (including measures described by CST's hosting provider such as firewalls, WAF, and malware protection).
- CST stores invoicing and payment data in its accounting system (Xero) and on its own infrastructure.

8.3 Special Category Data

Where SEND-related or medical information is shared, it is treated as special category data. The system is designed to use such data solely for planning and delivering safe lessons, and not for unrelated purposes. Retention is limited to essential notes.

8.4 Safety Considerations

Safety is central to lesson delivery. The system must:

- Ensure bookings are not accepted where safe delivery cannot be reasonably assured.
- Support the recording of essential safety notes and SEND-related needs.
- Avoid calendar errors that could compromise supervision or safe use of pool space.

8.5 Limits of Responsibility

The Phase 1 system does not:

- Control the physical safety of pool facilities.
- Replace professional safeguarding practices or supervision duties.
- Provide automated risk assessment or clinical advice.

These remain the responsibility of Levi, CST, and the pool operator within their respective roles.

9. Risks and Operational Fragilities (Phase 1)

Key risks include:

- **Manual calendar maintenance**: Errors in the bookings calendar can result in double bookings or missed sessions.
- **Reliance on email**: Important messages may be missed, delayed, or misdirected (for example spam filtering or incorrect addresses).
- **Sensitive data via insecure channels**: Parents may overshare sensitive data by email, creating handling obligations.
- **Single-person dependency**: Phase 1 relies heavily on Levi's availability and judgement for reviewing requests, assessing SEND needs, and managing changes.
- **Disconnect between bookings and accounting**: Because CST's systems are separate, booking changes must be communicated reliably to avoid misaligned invoices.

These risks are partly mitigated by simple, disciplined procedures (for example careful calendar management, structured communication with CST, and clear data-handling practices).

10. Future Enhancements (Out of Scope for Phase 1)

Future phases are expected to extend the system while preserving the Phase 1 boundary. Likely enhancements include:

- A live availability view integrated into the website.
- Automated booking, confirmation, and rescheduling functions.
- Integrated payment processing for one-off payments and direct debits.
- Automated reminders to parents and carers.
- Technical interfaces between the bookings calendar and CST's accounting tools.
- Improved support for structured storage and retrieval of SEND-relevant information.

These enhancements are not part of Phase 1. They are noted here to clarify direction and to support future design and planning work.