



**GLOBAL CHILD &  
MATERNAL HEALTH**

## **Invitation to Tender: Organisational systems review, design and implementation Project brief**

### **About Global Child & Maternal Health (GCMH)**

Global Child & Maternal Health (GCMH) is a community-focused research and implementation organisation committed to tackling health and social inequalities affecting children, young people and families.

Everything we do is driven by one principle: ensuring that evidence leads to meaningful change. We work across research, implementation, policy, community engagement and communications to develop practical solutions that improve outcomes for the communities we serve.

As the organisation has evolved, so too has the complexity of the work we deliver. Alongside managing multiple funding streams, we coordinate research projects, community programmes, stakeholder relationships, events, communications, partnerships and organisational reporting. Like many growing organisations, our systems have developed organically over time and are no longer keeping pace with the way we now work.

We have reached a point where investing in our organisational infrastructure is essential to ensuring that GCMH can continue to grow sustainably while maintaining the quality, agility and community focus that define our work.

### **1. The opportunity**

We are seeking an experienced partner to work alongside us to review how GCMH currently operates and help us design an organisational system that supports our future.

Whilst this brief originated from discussions about procuring a Customer Relationship Management (CRM) system, our internal review demonstrated that our needs extend far beyond stakeholder management alone.

Our aspiration is to develop an integrated organisational system that supports how we work as a team.

This includes how we:

- build and maintain stakeholder relationships;
- manage projects and programmes;
- oversee multiple funding streams;
- monitor grant reporting and organisational commitments;
- coordinate community engagement;
- plan and deliver events;
- capture organisational knowledge;
- support communications and storytelling;
- improve organisational visibility; and
- enable collaboration across the organisation.

We recognise that the right solution may not be a traditional CRM.

For that reason, we are deliberately not prescribing a particular platform or software package.

Instead, we are looking for an experienced partner who can take the time to understand our organisation, challenge our thinking where appropriate and work collaboratively with us to identify the solution that best meets our needs.

We welcome proposals that recommend a single integrated platform or a combination of complementary systems if this provides a more effective solution. We are far more interested in finding the right approach than implementing a particular product.

We want to work with a partner that recognises technology as an enabler of people, relationships and organisational effectiveness. We are seeking expertise not only in digital systems, but also in organisational design, process improvement and change management, ensuring that any solution reflects how GCMH works rather than expecting GCMH to adapt to inflexible technology.

## 2. Organisational background

The organisation's growth has increased both the opportunities available to us and the complexity of managing them.

Information is currently held across a range of systems including shared drives, spreadsheets, emails, calendars, event platforms and individual knowledge. Whilst these approaches have supported the organisation to date, they make it increasingly difficult to maintain visibility across projects, funding streams, stakeholder relationships and organisational commitments.

Our recent organisational review identified several recurring themes:

- Information is often stored across multiple locations, making it difficult to retrieve and share.
- Stakeholder relationships are not managed through a single organisational view.
- Grant reporting and organisational deadlines are tracked manually across different systems.
- Programme information, communications and project management are disconnected.
- Organisational knowledge is often held by individuals rather than shared systems.
- Increasing time is spent coordinating information.

Rather than implementing another standalone system, we want to take this opportunity to review our organisational infrastructure more broadly and establish systems that will support the next phase of GCMH's development.

### **3. Our requirements**

The areas below represent our current understanding of our organisational needs. We welcome recommendations from suppliers regarding how these requirements may best be met.

#### **a. Stakeholder and relationship management**

A central place to record and manage relationships with:

- Community organisations
- Families
- Policymakers
- Researchers and academics
- Journalists and media contacts
- Funders
- Strategic partners

The system should help us understand:

Who we know / How we know them / Which programmes they are connected to / Previous interactions and engagement history / Ownership of relationships across the team / Follow-up actions and opportunities

#### **b. Events and engagement tracking**

A way of understanding engagement across multiple touchpoints, including:

- Conferences
- Workshops
- Roundtables
- Parliamentary events
- Consultations
- Community engagement activities

Ideally, we would be able to see how individuals and organisations engage with GCMH over time rather than viewing each interaction in isolation.

#### **c. Grant and funder management**

A central system for monitoring:

- Active grants

- Funding periods
- Reporting deadlines
- Reporting requirements
- Grant conditions
- Key contact
- Submission status

The aim would be to ensure important reporting requirements are visible and proactively managed.

#### **d. Programme and project management**

A way of tracking:

- Programme objectives
- Activities
- Deliverables
- Outputs and outcomes
- Risks and dependencies
- Project timelines
- Responsibilities across the team

This would help us understand how our day-to-day activity aligns with funded commitments and organisational priorities.

#### **e. Organisational reporting and dashboards**

The ability to quickly access information such as:

- Upcoming deadlines
- Active grants
- Project status
- Stakeholder engagement
- Event participation
- Organisational reach and influence

The goal is to provide greater organisational visibility and reduce reliance on individual memory or manual tracking systems.

Whilst these requirements are presented separately, we do not necessarily expect them to be delivered through separate systems. One of the key objectives is to reduce fragmentation and improve integration across the organisation. We therefore welcome proposals that consider how these different organisational functions can work together within a coherent and sustainable digital ecosystem.

#### **4. Scope of the consultancy**

We expect the successful organisation to:

- undertake a discovery phase
- review our current systems
- engage with staff
- map organisational workflows
- recommend an appropriate solution
- configure and implement agreed system(s)
- migrate data where appropriate
- provide staff training
- develop supporting documentation
- provide post-implementation support

#### **5. What success looks like for GCMH**

We want every member of the team to spend less time managing information and more time delivering impact.

Success will be measured not by the implementation of a new system, but by improvements in organisational visibility, collaboration, efficiency and our ability to sustain future growth.