

Request for Quotation: Business Efficiencies & System Optimisation Support

1. About Active Lincolnshire

Active Lincolnshire is a charity funded by Sport England to deliver the national Uniting the Movement strategy locally addressing inequalities and the challenge of inactivity.

Our role is to understand local people and places, and work across the local system to bring people and organisations together to help more people be more active, more often. We champion the positive impact of sport and physical activity across people of all ages and abilities, and we are committed to improving access and participation across Lincolnshire.

We collaborate, co-create, listen to communities, and take a test-and-learn approach to change.

We support a whole-system approach to embedding physical activity into daily life. We are the strategic lead for coordinating and communicating across the physical activity, sport, and leisure sector.

Our work is focused on tackling inequalities and ensuring everyone has access to opportunities to be active.

We are seeking support to review and strengthen our organisational systems, tools, and ways of working. While we already have many systems in place, we want to ensure they are being used consistently and effectively and that they support our operational and strategic goals, streamlining our ways of working and advising on proportionate investments in tech and tools to support our work.

This project is focused on improving efficiency, embedding best practice, and enabling better tracking of impact and engagement. It should help us build clearer visibility across our work and support future organisational growth.

Context

The systems we operate in are complex, multi-layered and vary across Lincolnshire's organisations, partners and stakeholders.

Our organisation is modest but growing, with expected increases in employees and income predicted to more than double in the next 12–18 months. Our work has

outgrown and outpaced our internal systems and processes. As our work has scaled rapidly we need systems and processes that connect, complement one another, and reduce duplication.

Our impact is monitored by Sport England and other funders, but we do not yet have an efficient or comprehensive way to capture, record or analyse it.

Our work is systemic, long-term, and based on building relationships, partnerships and influence rather than short-term KPIs.

We now need systems that reflect the nature of this work, capturing change over time, learning, engagement, and influence.

2. Scope of Work

Active Lincolnshire is seeking an experienced individual or organisation to:

- Review the way we use our existing business tools and systems
- Identify opportunities to streamline, connect and improve them
- Develop, configure and embed a coherent, user-friendly suite of tools and processes

We currently use a CRM and a cloud-based file storage platform, alongside various processes and templates. However, these are not yet fully aligned or consistently embedded across the organisation.

We need integrated, intuitive and scalable systems that help us:

- Understand and manage relationships with stakeholders
- Plan, deliver and monitor programmes consistently
- Share knowledge and communicate effectively
- Build and maintain robust place-based insight
- Monitor, learn from and demonstrate our impact

We want to transition away from fragmented, spreadsheet-heavy working practices toward a connected system architecture that:

- Provides clear visibility of relationships, activity, progress and impact
- Reduces inefficiencies and frees up staff time
- Enables real-time insight for decision-making
- Aligns with our place-based systems approach
- Supports statutory and funder reporting requirements
- Helps us tell a coherent story of change

Solutions should make smart use of existing tools rather than rely on bespoke development. The work must be co-designed, tested, and refined with the Active Lincolnshire team.

Deliverables / What We're Looking For

We need someone who can:

1. Review current systems and identify what is working well
2. Highlight gaps, inefficiencies and alignment issues
3. Provide practical guidance on improving use of existing tools
4. Recommend opportunities to improve efficiency and workflows
5. Strengthen our ability to monitor, report and understand our impact
6. Support adoption and embedding across the team
7. This work is not about replacing all systems; it is about clarity, integration and enabling our tools to support our ways of working.

Desired Outcomes:

The supplier will be expected to work across five interconnected workstreams. We recognise these are overlapping and expect a coherent, integrated approach rather than five standalone products

1. Stakeholder engagement and journeys: CRM and monitoring tool – **End December**
2. Project planning and management tool: **End March**
3. Internal communication and business efficiencies: **End March**
4. Place profile information capture tool/platform: **End December**
5. Impact and monitoring tool/platform: **End March**

We need a supplier who can start immediately and work closely with our team, leading core delivery due to limited internal capacity.

1. Stakeholder Engagement and Journeys

The problem

We don't have a single, consistent way of recording who our stakeholders are or how we are connected to them. We speak to thousands of people across many organisations, but we are not currently tracking:

- Who we are in contact with (even basic details)
- Notes from meetings and conversations
- Outcomes or changes in relationships
- What we learn about partners and networks

Why this matters

Strong relationships are essential to our work

Different colleagues often speak to the same stakeholders, so shared information is important.

We waste time recreating spreadsheets and contact lists instead of using one central system

We need to see how our relationships develop over time, especially for work on tackling inequalities

We need to map networks in places or around themes as they grow

What we think we need

A CRM system, a simple way to track stakeholder journeys, and a tool to map networks.

2. Project and Programme Planning, Management and Performance

The problem

We don't have a clear, consistent approach to planning or managing projects. This means we often lack clarity on tasks, progress, deadlines, responsibilities and budgets.

Why this matters

Complex projects need clear planning and monitoring

Budgets are not always fully used

Accountability can be unclear

It's difficult to see performance at a glance

Summarising a programme quickly is hard

What we think we need

Real-time progress reporting, dashboards, and a simple project management process that everyone uses in the same way.

3. Internal Communication and Efficiencies

The problem

We don't have clear or efficient methods for internal communication and sharing information. Important updates, notes and documents take time to create and are not always easy to find.

Why this matters

A lot of knowledge exists across the organisation, and it needs to be shared well

With a small team (under 20 people), we don't need a full intranet, but we do need better ways of working

Time is wasted on repetitive admin tasks

What we think we need

Simple, consistent communication methods and tools (including AI where helpful) to reduce duplication and save time.

4. Place-Based Information

The problem

We don't have one central system for collecting and building on what we know about the places we work in. This includes both facts and lived experience.

Why this matters

Our work relies on understanding people and place deeply

We need to bring together data on groups, services, facilities and communities

We also need to collect and store what we hear, learn and see when working locally

We have an emerging place toolkit, but it now needs turning into a digital tool that can grow over time

What we think we need

A place profile tool or platform that can store, organise and grow with our place-based insight over the next three years and beyond.

5. Impact of Our Work

The problem

We don't have a consistent approach to measuring or reporting the difference our work makes, whether short-term or long-term.

Why this matters

Our work includes both immediate programmes and long-term system change

We must report progress to Sport England, our Board, and local partners

We need a way to understand and review our impact over time

Sharing our story helps learning and influences further change

What we think we need

A simple and structured impact and monitoring tool that helps us track change, learn from it, and share our progress clearly.

This is not a traditional consultant-led report, across all workstreams, the systems implemented should:

- Be intuitive, user-friendly and proportionate for a small charity
- Be flexible and scalable to accommodate growth in staff, programmes, and data
- Support collaboration and sharing across the team
- Reduce duplication of effort and data entry
- Provide useful, real-time insight (not just static reports)
- Be based primarily on existing platforms and tools used smartly, rather than complex bespoke development
- Be secure and compliant with relevant data protection and information governance standards

3. Timescales

Action	Date
Brief issued	Friday 26 th November 2025
Deadline for response	Friday 5 th December 2025

4. Budget

The budget should include:

- All consultancy fees
- Expenses
- VAT (if applicable)

Suppliers should demonstrate value for money and clearly differentiate any one-off versus ongoing costs.

At this stage, we are commissioning the **development phase** of the work. This phase will focus on understanding our needs, designing the right systems, testing them with the team, and agreeing the processes and tools we will use going forward.

Once the development phase is complete, we expect to move into a separate **implementation phase**, where the agreed systems and processes will be fully rolled out across the organisation. This will include final configuration, staff training, and support to ensure consistent adoption.

The successful supplier for this RFQ will be expected to:

- Lead the development phase
- Work collaboratively with the Active Lincolnshire team to shape the solutions
- Provide clear recommendations and estimated costs for the implementation phase

We are not seeking full implementation within this commission, but the work must be designed in a way that makes implementation straightforward, scalable and sustainable.

5. Your Response

Interested agencies are required to submit the following:

- **Methodology:** Outline your approach to fulfilling the scope of work and delivering the objectives.
- **Price:** Provide a breakdown of costs, including any expenses.
- **Examples of previous experience:** Include relevant case studies.
- **Team Experience:** Brief profiles of the team members who will work on this project.
- **Timeline:** A proposed timeline for expected start dates.
- **Added Value:** Any additional experience, ideas, or opportunities you would bring.
- **EDI:** Link to your EDI policy and evidence of your commitment to inclusion.
- **Environmental Commitment:** Link to your environmental sustainability policy.

Active Lincolnshire is fully committed to embedding equality, diversity, and inclusion across our organisation. Inclusion is central to all that we do, and we take a zero-tolerance approach to any form of discrimination. We require our wider supply chain to uphold the same values. We will not work with suppliers that do not share this commitment, and we reserve the right to terminate contracts with any supplier who fails to comply.

Procurement Process

- Minimum of three written quotes required
- Evaluation Panel
- Suppliers may be invited to present or clarify proposals

6. Selection

The selection will be based on the information provided in your response and will be reviewed and scored by a panel on the following weighting:

Criteria	Weighting
Approach to the brief, innovation and creativity, and ability to meet timescales	35%
Value for money	25%
Relevant experience	15%
Alignment to our values and objectives	10%
Commitment to equality, diversity and inclusion	5%
Environmental commitment	5%
Added value	5%

7. Contact

If you have any questions or would like to discuss this further,
please contact:

Clare Williams,
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8. Additional Information / Useful Links

Sector: UK Charity / Sport Governance
Team Size: 15 employees (with growth projected within 18 months)
Location: Lincolnshire (flexible and hybrid working culture)

Active Lincolnshire <https://www.activelincnshire.com/>
[Our overall strategy \(Let's Move Lincolnshire Strategy\)](#)
[Business Plan](#)