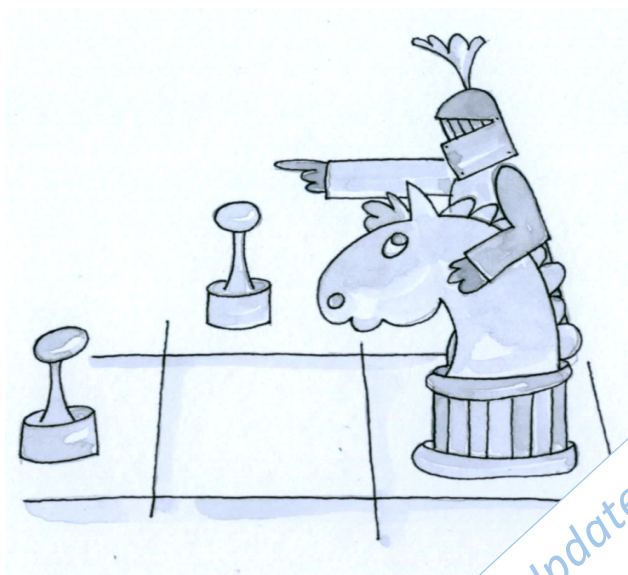


Strategic planning for iNGOs

- A practical guide -



Updated & Enhanced

New Edition of Chapter 5

Building a Better international NGO

... Greater than the Sum of the Parts?

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1. Introduction

The process of developing a new strategic plan can be exciting, engaging and energising. It is truly satisfying when the process works well. It provides the opportunity for very different views, beliefs and assumptions to be discussed, enriched and realigned. It allows the organisation to ponder the most important external trends, innovations and opportunities. The debate and analysis should make it possible to identify and address some of the most important strategic choices for the future, setting a direction, priorities and goals, and gaining alignment across all the constituents of the organisation on the way ahead. Easily said!

However, the process of building a new plan can be a challenge for any large international organisation, and especially for those in the international development and humanitarian arena. With numerous and growing areas of need, and evolving thinking on the most effective approaches and interventions, organisations have a multitude of options in terms of applying scarce resources.

And - even when the process delivers a well thought through plan, it is highly unlikely that either the process and/or the result will satisfy all of the people - all of the time. International NGOs have a cadre of management and staff at all levels who all feel they have valid and useful perspectives and a right to be consulted and be heard. This can be an opportunity – though sometimes, a challenge. We've been there a few times!

Getting the process right is paramount. A poorly designed process will do little more than expose and emphasise deep divisions across the organisation, causing frustration and disappointment. Some organisations can be tempted to sidestep this challenge, fearing that the pain and effort to carry out a thorough strategic review is too great. Instead, they lock a few bright

people in a room for a few weeks - to draft a carefully crafted document, with the right language and nuance, one that nobody will object to too much. The implication? - avoid the difficult choices, fudge the internal contradictions, and completely miss out on the opportunity to steer the organisation onto a clearer, stronger course.

Four steps

In many ways the process of conducting a strategic review at an international NGO is like that employed for any large organisation in any sector. We like to think about the process in terms of four steps. These are:

1. **Taking Stock.** Review internal progress, successes, challenges as well as external mega-trends. Isolate important strategic questions and choices that need to be tackled.
2. **Making Choices:** Carry out the necessary analysis, debate and consideration of the key strategic questions and choices. Make concrete recommendations and understand implications.
3. **A Document:** Integrate the recommendations into a coherent direction and way forward. Produce an integrated strategic document for review.
4. **A Plan:** Articulate the choices and decisions into a set of clear goals and targets to guide the organisation into the future; Identify the one-off initiatives needed to change course. Carry out the necessary planning within the different units of the

The four steps ...



organisations (functions/regions/countries) to align objectives and targets with the new direction, goals and priorities.

What's different for our sector?

Based on our hands on learning, there are some important characteristics and differences in this sector – which impact on how these set of steps need to get carried out. Let us summarise the top five differences we see:

Firstly, because of the complexity of geographies and governance arrangements as well as the considerable scope of activities for many international NGOs, an international strategic planning process may be **an exceptional 'one-off' opportunity** for serious, joined-up reflection, analysis and decision making, when we bring together the perspectives from all the constituents of the organisation at operational, executive and board levels. Issues that are not tackled, or decisions that are not made during a strategic review, may not be properly explored for several more years.

Secondly, the nature of the work of development agencies places enormous emphasis on **consultation, engagement and participation**. This is an important factor to consider in the design of the process. Proper and genuine consultation, at the appropriate time, and at the appropriate level can

be very useful, though we need to be careful to ensure it is meaningful and helpful, rather than tokenistic or symbolic. In addition, we stress the need for balance - between effective and useful consultation, whilst not being overly intrusive on the day-to-day work for staff across the agency.

Third, an unusual characteristic of our sector, **those who provide the funding are typically different to and in a different part of the world to the end stakeholders/beneficiaries**. This means that there is the possibility of an in-built disconnect between the perspectives and demands of those who are providing the funding, with the views of local stakeholders and development professionals in terms of what kinds of programmes contribute best – especially in the longer term. Obtaining a

balanced and proportional set of views and inputs is important to accurately inform the analysis and recommendations.

The fourth key difference is that many large international development agencies typically have **an**

extraordinarily wide geographical footprint and scope of activities compared to private sector organisations. Larger international NGOs such as World Vision, Care International or Plan International may cover anything from 50 to 100+ countries across multiple continents and span a broad range of domains such as relief, health, agriculture, microfinance, governance and inclusion. This 'stretch' or fragmentation of interests and outputs can stretch the coordinating processes and systems of these organisations. And we know that

Five Key Differences

- ✓ Exceptional one-off opportunity
- ✓ Consultation, engagement, participation
- ✓ Disconnect donors and beneficiaries
- ✓ Enormous scope and geographic footprint
- ✓ Questions of legitimacy

weaknesses in this 'glue' is very understandable, especially since there are not sufficient economies of scale to justify the substantial system level investments that would be required to integrate and strengthen this 'glue' across all countries and functions.

Last, but by no means least, **international agencies have a constant challenge to justify their legitimacy**. The work that they do is continuously (and increasingly) questioned in terms of its efficiency, impact and its longer-term sustainability. Indeed, there are regular commentators who claim that the work that is done by these agencies is of limited value/impact if not counterproductive. Hence, we believe it critical that international development agencies are robust and deliberate in their approach to strengthening their legitimacy as part of their strategic planning analysis. This is likely to involve some thoughtful (sometimes very tricky) discussion and alignment on the agency's 'theory of change', i.e., its collective understanding of how positive and lasting social and economic progress can best be achieved in poor communities and countries. This should lead to an improved understanding and definition of what that agency's specific role and contribution will be in the years ahead. This should in turn lead to a clear definition of what the agency is and needs to really excel at,

which we term 'core competence'. The challenge of defining core competencies is the subject of Chapter 2 of our earlier publication 'Building a Better international INGO'; *"The core competencies of an international NGO: What are they? What do they need to be?"*

Overview of this paper

Section 2 sets out a summary of the key success criteria for a good strategic plan. Section 3 outlines a suggested (illustrative) approach covering the main steps, an indicative structure, as well as some tips to help coordinate the progression of thinking and analysis as we set out to make solid recommendations and choices. We also discuss a few variants and permutations, together with our assessment of the pros and cons of each. This is followed in Section 4 by some reflections on how a strategic review, typically carried out every five or so years, fits into the ongoing management and planning processes for any well-run global agency. Section 5 concludes with a very practical Q&A for discussion. Here we share some practical perspectives on some of the most common questions that often arise during a strategic review.

2. Are we there yet?

Given the context and challenges in this sector, and the important differences outlined earlier, it is worth standing back and asking the question: **What are the most important success criteria for a good strategic plan?** After lots of hard work, analysis and debate when participants enter the latter stages, perhaps beginning to get tired, – it is reasonable to ask: **Are we there yet? When will we be there?**

The following pointers are intended to help guide your thinking. These are, in our view, some of the most important success criteria (could call them goal posts) of a good strategic planning process for any international NGO.

First base

1. **It brings longer term clarity in terms of the direction and priorities of the organisation**, helping define what it is seeking to achieve, what it plans to do and, equally importantly, what activities or programmes it does not intend participating in (because they can best be done by others, or the benefits are unproven). In doing this, **it should describe a future vision for the agency, which is unifying, ‘stretching’ and inspiring for the entire workforce.**

2. **It should provide answers to the important strategic questions or choices** which have emerged since the previous strategic review. These may be provoked by internal or external challenges or perhaps new opportunities or issues that may cause misalignment and tension unless adequately dealt with.

Exhibit 1

Success Criteria

First base

1. *Clarity in direction and priorities - Describes a future vision for the agency which is unifying, stretching and inspiring*
2. *Tackles (i.e. answers) important strategic questions and choices*
3. *Stipulates clear, high level calibration goals/milestones*
4. *Is embraced, understood and approved by governance board(s)*

Tangibles

5. *Provides guidance on prioritising investment opportunities*
6. *Provides an anchor for planning and performance management at organisational and individual levels*
7. *Features prominently in the life of the organisation and is a valuable communication tool for all staff*
8. *Helps external stakeholders understand what the organisation does.*

Intangibles

9. *Brings the organisation together intellectually and emotionally*
10. *Increases confidence in own legitimacy*
11. *Tests and strengthens the organisation’s theory of change*
12. *Increased clarity on our core competence/s*

3. **It specifies some clear calibration goals over the life of the plan** (typically 5, 7 or 10 years), making it possible to track progress in the delivery of the strategy. As an aside, we believe it is very important for the plan to have early ‘traction’ within the day-to-day life of the organisation. In this regard the “half-life” principle is a useful guide. This principle suggests that more than half of the changes implied by the new strategic plan should be put in place within the first 12 to 18 months of the strategic horizon. Thus, if major strategic shifts or a change in direction is sought, a good strategic plan should set out, promptly, what this means in terms of practical actions and/or changes needed to rapidly realign the organisation.

A small aside! .. to note that a change in direction is not always needed or sensible. In some situations, it is absolutely fine to have a strategy which says that the organisation should keep going on its current trajectory – perhaps merely setting some new stretching goals or milestones along that path.

4. **It is understood, embraced and approved by the governance boards** that have a responsibility for the strategic direction of each component of the global organisation. This is more easily said than done. Gaining approval can be the easiest part, particularly if boards are less aware, or connected to the reality of organisational context and choices. Achieving 'understanding' and 'embracing' can be more challenging. In some cases, it may be helpful to engage a few board members to collaborate in the development of the new strategy. They can bring important external perspectives and expertise. And when back in their board roles, these individuals can help explain and communicate new strategic directions, choices and implied changes to their board colleagues.

Tangibles

5. **It provides focus and direction when prioritising endless lists of investment opportunities**, as well as reducing unhelpful debate on ideas, initiatives or investments that don't fit. Ideally, this clarity will become pervasive, so that the energy of the organisation is concentrated on ideas and innovations that fit on the strategic canvas. Hence, proposals are less likely to surface, or attract much effort and cost, (and generate much noise) unless they are aligned with the organisation's strategic direction and priorities.
6. The overarching goals specified in the international strategic plan should provide an **anchor for performance management** (accountability) at organisational and individual levels. This will help ensure the different units or constituents of an organisation are working toward a common goal in a coherent and productive manner. As mentioned earlier, this is a particular challenge for many NGOs today, given the status and maturity of their international planning, performance management (and accountability) approaches. This challenge is a recurring theme across our research and is the topic of Chapter 6 of our

earlier publication '*Building a Better international NGO*'.

7. The final plan should be easily understood, and become a **valuable communication mechanism for all staff**, helping all to understand what the organisation aims to achieve, and assisting each department and individual to better understand how their efforts contribute to the organisation's overall goals. It should feature prominently in the daily life of the organisation.
8. **It should help external stakeholders understand what the organisation does**, what it is trying to achieve and how others might cooperate or collaborate. To this end, it often makes sense to have a simplified, external version of a strategic plan which is tailored to the information needs of external stakeholders.

Intangibles

9. **It should bring the entire organisation together intellectually and emotionally**, at least at a point in time, providing a kind of glue across different parts and levels of the organisation. International development and relief agencies can have a complex network of structures and governance, spanning funding and programme countries with multiple national as well as international boards. This is getting increasingly complex as some agencies follow the popular and well-intentioned trend towards the establishment of greater autonomy for all countries (South as well as North), typically converting local branches or country offices to affiliates of a flat global federation structure. A well-run strategic planning process can provide a unique opportunity for all constituents of the agency to come together and seek alignment of direction, creating a single set of goals and priorities for all.
10. **It should strengthen the confidence of the organisation in its own legitimacy**, providing evidence to support the organisation's right to act in support of the poor, for example its' right

to be an effective contributor in advocacy initiatives at local, national and international levels. The legitimacy of large agencies is often more fragile than we might like to admit. In a world of increasing scrutiny (efficiency, effectiveness, value-for-money, long term impact), this is an essential question to tackle during a strategic review. Strengthening legitimacy is likely to include a range of factors, such as transparency, accountability to beneficiaries, donors and partners. The topic of organisational legitimacy is usefully explored in Paul Ronalds' book, *"The Change Imperative – Creating the Next-generation NGO"*¹.

11. **It should unpack, test and strengthen the organisation's 'theory of change'**. Achieving genuine and deep alignment on how positive social and economic change comes about in poor communities, countries and regions, provides a strong foundation for a cohesive, high-performing development agency. In simple terms, this could be articulated as: a shared understanding of the main characteristics of a good development programme. Most organisations find it relatively easy to gain consensus on statements around purpose and vision, and even values. However, deep alignment on what good development practice means is less easy. However, without this, decision making will always be problematic, and the chances of creating a high-performing international organisation may be remote.

Unsurprisingly, misalignments often exist between funding offices and field programme functions in terms of what donors are willing to support, on one hand, versus what might be regarded as good development practice on the ground. However, misalignment also often exists between skilled staff in the field whose views have been shaped by their own experiences and beliefs. Of course, achieving alignment should not, and need not be to the

detriment of continuous learning. In fact, it is our firm view that having a shared 'theory of change' is a key foundation stone for ongoing learning and innovation.

12. Building on this confidence, a good strategic plan should shine the spotlight on the most important **core competence(s)** that define what the organisation is good at - and needs to be really good at in the future. It should also assist the organisation to gain an appreciation of the underlying capabilities, new investments and initiatives that need to be in place to strengthen these core competence(s) into the future. This concept is explored in depth in Chapter 2 of our earlier publication 'Building a Better international NGO'.

¹ Paul Ronalds, *The Change Imperative – Creating the Next Generation NGO*, (Kumarian Press, United States, 2010)

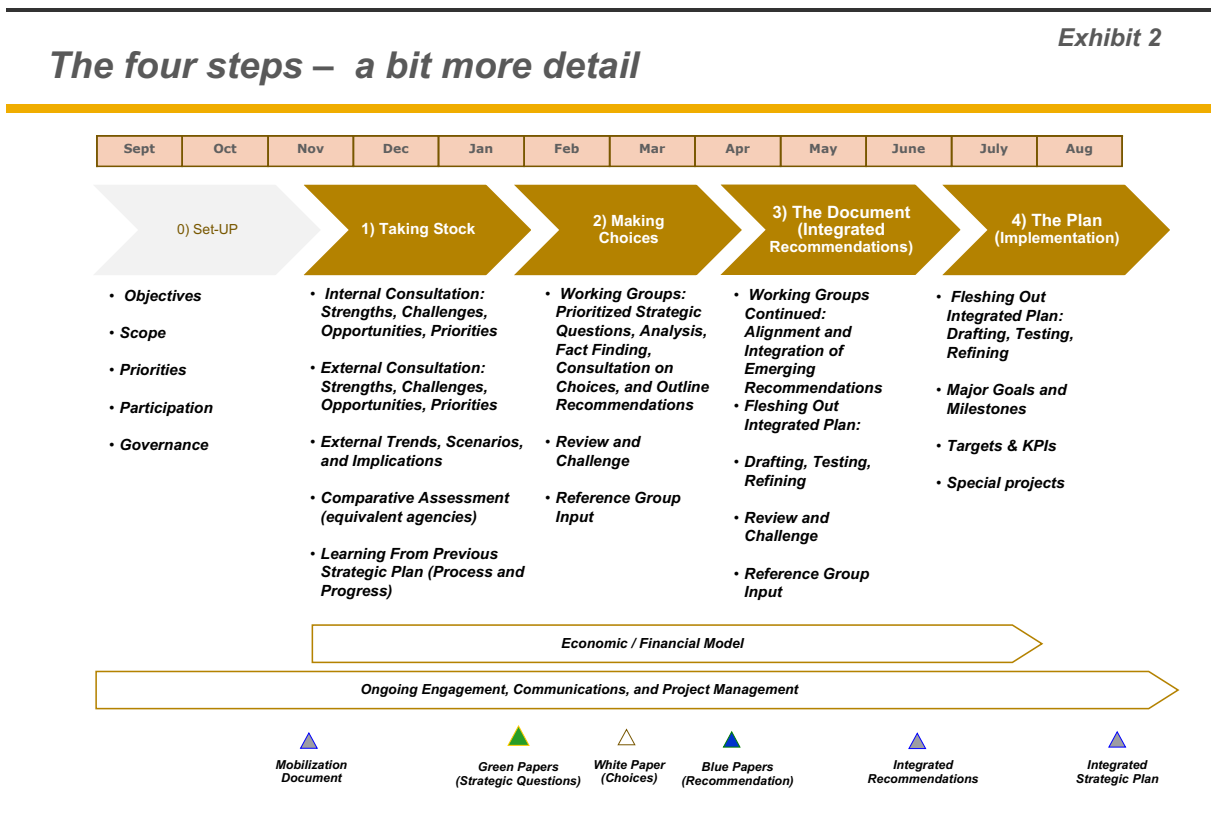
3. Basic elements of an ‘illustrative’ approach

How do we design a process to deliver on the set of ambitious success criteria set out in section 2. The following is an overview of one ‘illustrative’ approach. This builds on the core elements of any solid strategic planning process – though is tailored to respond to the characteristics of our sector – as discussed in Section 1. This is intended as an ‘outline template’ for international agencies contemplating such a review. This approach tries to find a reasonable balance between pace and rigor, on one hand, with a reasonable level of structured participation on the other.

Exhibit 2 gives an overview of this “illustrative” approach showing the suggested sequence of key

activities as well as indicative timings. Starting on the right footing is one of our major lessons for strategic reviews, particularly in this sector.

International NGOs can sometimes be highly charged organisations, with deep rooted beliefs and sensitivities. Hence, in the pre-consultation phase (*what we call Step 0*), the emphasis is on preparing the organisation and setting a good foundation for a high-quality review. It is imperative that a strategic planning process is set off in the most positive and inclusive manner possible. In other words, failure can easily and accidentally be ‘designed in’ at the outset.



This will require considerable thought, including selective consultation with management, staff and board representatives. What needs to be gained at this stage is an understanding of the varying perspectives, initial views on some of the key strategic questions that may need to be tackled, views on participation, pace, timing and governance, as well as collecting any lessons from the previous strategic planning process.

Four steps

Following pre-consultation, the process can be broken down into four main steps. The first two are dedicated to framing and analysing key strategic questions, clarifying choices and making recommendations. Steps 3 and 4 are about articulating and finessing an integrated strategic plan which communicates the direction both internally and externally, as well as defining, at a reasonable level, what needs to be done to implement the desired goals and priorities.

Underpinning these four steps are two important strands of work. The first is the considerable effort that needs to be devoted to **communication, engagement and project management**. This continues for the entire duration and is a very important part of any successful review.

The second is to build a practical, joined-up, **financial/data model** to help inform the analysis as the work proceeds. This model will cover the key financial data (recent and projected on fundraising, expenditure, and investment), as well as important data on staffing, donors, programmes and countries. This will be hugely valuable in helping to assess the key trade-offs as well as the implications of emerging strategic recommendations.

A bit more detail on each of the four main steps.

1. **Taking Stock**

In Step 1, we analyse the internal and external environment to identify/confirm the key strategic questions or choices that need to be tackled in Step

2. We examine the internal context, successes/failures, strengths & weaknesses, and new opportunities.

We also try and identify and understand the most important external trends or shifts which might shape the environment we will operate in during the next 5 -10 years. Our learning – from bitter experience – avoid lists of 100+ trends (*rabbit hole!*) .. instead focus on the most important 5 to 10 - and carry out a thorough analysis of the drivers, the implications and impact of each on the sector.

During this step, it is often instructive to carry out a thorough '*lessons learned*' review of the previous strategic plan. Evaluate actual progress against the goals or targets, understand where progress was strong. What blockages came in the way? - why haven't we been able to remove these blockages? This kind of reflection can be very helpful to drive a more successful process next time around.

In this step we try to get as broad a view as possible from every part of the organisation on the critical issues and questions that staff and management in the agency feel should be considered as part of the review. This will provide the long list of strategic questions. These all need to be sorted, grouped and prioritised to identify the most important strategic questions that are taken into Step 2. Which are most important to answer now? Which are possible to answer now?

2. **Making choices**

This step is the cornerstone of a strategic review. We analyse the long list of strategic questions from the previous phase, carry out a stringent prioritisation, group them into related areas and allocate to a working group. We then refine the wording of each question so that it is precise and robust, making sure to articulate the key discontinuities behind each question - could be problems, challenges or opportunities. At this stage, it will be helpful to hypothesise the range of choices that may be worth considering, making sure that radical thinking is encouraged.

Next, carry out a thorough exploration and analysis of each prioritised question. It is likely that some considerable data gathering, consultation, analysis and discussion will be required to gain a deeper understanding of the key factors behind the question, and also to help articulate a full set of choices or responses. The emphasis will then move to identifying and describing a small number of diverse but feasible choices (i.e., A or B), the key features of each choice, pros and cons as well as implementation considerations.

In most cases, the work to frame, analyse and define choices is conducted by carefully selected working groups with in-depth understanding of the technical and business aspects of the strategic question(s). The individuals chosen will need to step outside the frame of their normal roles and be willing and able to address the questions from the perspective of the totality of the organisation. Typically, a working group is responsible for developing the analysis and choices for a particular set of issues/questions. *[In the next section, we will further discuss the roles and structure of the various working groups. Working groups may need to liaise with reference groups and external experts, as well as on a more ad-hoc basis with relevant individuals or small groups with particular expertise or perspectives. They will also liaise with other working groups to ensure any linkages (supporting or conflicting) between choices in different question areas are properly managed.*

On selecting the appropriate choice or response for each strategic question, each of the working groups

then finalise their recommendations, and provide supporting rationale. These are presented to the other working groups, and also to the strategy integration team (*more detail in next section*) who would then review and consider these responses in

an integrated manner. The emphasis, ideally, should be on reaching collective viewpoints, which are then put to the executive leadership team for challenge and ratification. It is possible that the strategy integration team will ask the working groups to provide additional evidence and rationale to support their recommendations and, potentially, to go back and explore more radical choices for analysis and consideration.

At this stage in the process, expect considerable dialogue across working groups and intense debate on the most sensitive and far-reaching choices that are being explored.

3. A Document! - Integrated strategic recommendations, priorities & goals

In Step 3, we take the outputs & recommendations of each working group and develop an integrated set of recommendations for the agency. Initially, this will be at a reasonably high level, and include directions, priorities

and goals for the agency for the following five years (could be 5, 7 or sometimes 10). In parallel, we begin to craft the integrated document, initially with a broad structure, fleshing out the detail as decisions are agreed.

Exhibit 3

Examples of strategic questions from previous projects

- ✓ *How should we respond to the changes driven by the debate around the 'decolonisation of aid'?*
- ✓ *How can AI impact the design and implementation of both emergency and long-term development projects?*
- ✓ *Should our agency fully adopt a rights-based approach in how it does its programming? If so, what would that mean on the ground, and how does it impact our long-term funding strategy?*
- ✓ *Should we abandon the distinction in our model between a) funding countries and b) programme countries, {Since, today, the poor and disadvantaged on the planet are spread across poor, middle income and rich countries.}*
- ✓ *Should we run programmes in the "North" as well as the "South"?*
- ✓ *Should we focus exclusively on one area of development need or domain, for greater focus and differentiation?*
- ✓ *What is the core competence of the agency? How does this need to evolve/ be strengthened for the future?*
- ✓ *What does the debate around 'feminist leadership' really mean? And how should it be considered in everything we do?*

At this time, the working groups who carried the heaviest load in Step 2, will be on standby, sometimes to revisit their analysis and recommendations as the complete picture emerges. Representatives of the working groups may be called on to hypothesise some concrete and hopefully visionary goals for the end of 5+ years (*or the projected life of the strategic plan*), as well as some interim goals or objectives to calibrate the nature and pace of change implied by the recommendations.

4. A Plan - Integrated strategic plan, including implementation actions, projects, and KPIs.

As we begin the implementation planning stage, it is important that all the constituents of the organisation understand the rational and implications of the intended strategic direction and be able to take decisions for their area of responsibility. Take time to communicate, to explain, to listen and to adjust where assumptions of the working groups may not have been 100% correct.

The emerging recommendations, choices and goals need to be understood, embraced and considered as the binding force for all parts of the organisation. What do we need to do differently? What metrics and targets need to be put in place for each function/department/ geography? What special one-off initiatives need to be put in place to help us deliver on the new strategic goals and priorities? It can be helpful to do a systematic mapping of the over-arching strategic goals and emerging recommendations on to all the components of the global organisation – ideally leaning on some of the members of the working groups to bring deeper understanding and insight.

This step is considerably easier where there is a consistent and robust ‘planning and performance management framework’ across the entire international organisation. This can be a challenge, as we have discussed in chapter 6 of our earlier publication - Building a better international NGO. – Not all international NGOs have this – though most

have been making some decent progress in recent years.

What is this? ... Essentially, this is a framework or a planning and accountability tool/approach at an organisational level covering the most important objectives, measures & targets for all the main parts of the global organisation. Objectives and metrics in such a framework will be expected to span:

- ✓ Programmatic approach, outcomes & impact,
- ✓ Stakeholders/partners feedback,
- ✓ Staff and skills,
- ✓ Fundraising, donors
- ✓ Finance (income, cost and investments), and
- ✓ Business processes/systems/infrastructure.

Indicative project structure

Above, we have already alluded to some elements of the project structure. However, time to lay out this in a bit more detail. Of course, this is an illustrative example - not a prescription! However, it is important to have a clear and transparent project structure. This includes the roles and teams that will manage and deliver the review, as well as the decision making and governance mechanisms that will guide the process towards the agreed plan. The project structure suggestions that will follow are built on a few important principles, namely:

- a. **The need to construct small, carefully selected and focused working groups for each set of related strategic questions.** High performing working groups are central to a good process – and need to include individuals with both the knowledge, credibility and space to address the set of questions allocated to them. These individuals will carry out the analysis to identify and define well thought through choices and recommendations. Selecting these groups is one of the trickiest aspects of any good strategic review.

- b. **Achieving the benefit of broad-ranging, thorough and effective consultation.**
 Consultation is a central element of the first step – *Taking Stock*; though may happen in different ways throughout the project. A key element is balancing input from different dimensions of the organisation; from the field, from funding offices, affiliates and central specialist functions, as well as from external stakeholders. This needs to be well structured with robust even-handed analysis of the data collected.
- c. **The need to provide appropriate transparency and mechanisms so that individuals and groups throughout the organisation have the facility to provide useful input, where needed and productive, to emerging thinking at carefully selected points.** However, it is also important that the day-to-day work of the agency- delivering projects on the ground - is not unduly distracted by the process of the strategic review. The broader organisation can hopefully trust the process and the individuals nominated to take part. It is also important that the working teams who are analysing and progressing the questions, choices and recommendations, are not overly distracted by well-meaning but overwhelming or disruptive input from individuals throughout the organisation. In our experience, this is a considerable risk. Getting the balance right between a desirable level of engagement versus too much - can be a difficult balancing act!

The following “petal diagram” (Exhibit 4) provides a visual representation of a possible project structure. A few brief comments on each of the main elements.

International Board, Supervisory Board and National Boards

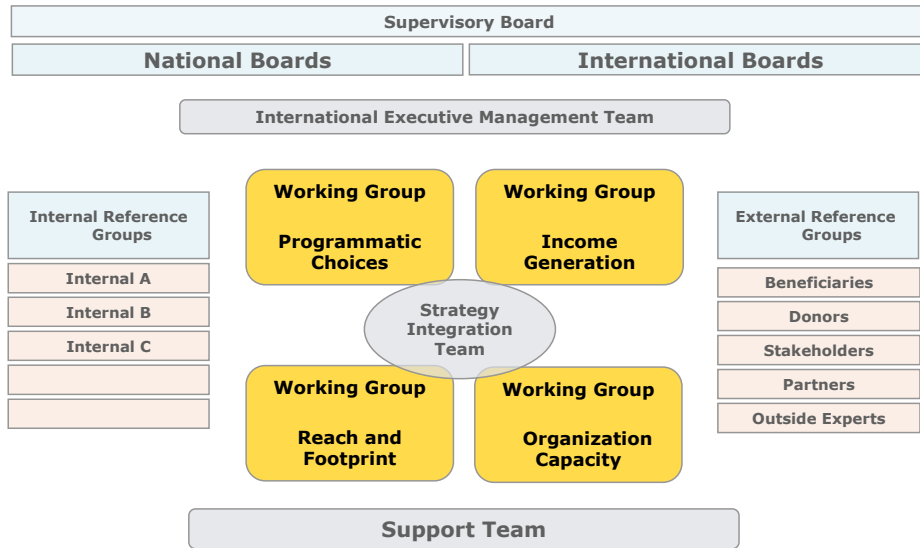
Large international agencies often have a complex set of boards at national and international levels. Hence, the process of a strategic review needs to be designed to provide these boards with the visibility, and in some cases with direct connection with progress and emerging decisions. Where possible, this should be done during pre-planned scheduled updates.

Alongside this “formal” route, we believe that hands-on participation of a few (very carefully selected) international board members can be very beneficial. An approach we have seen work very effectively is to have one board member as a normal participating member in each working group. In this way, boards can have more intimate contact and provide their own expertise and challenge in appropriate areas. There are a number of benefits. The first is to bring board members intellectually closer to the evolution of strategic thinking as it evolves, creating a valuable intimacy with the content and the process, which representatives can share with other board members. This should result in a much richer discussion at board level in the subsequent review and approval points. Of course, there are risks – should the nominated individuals overstep their intended role – or overwhelm the contribution of the other working group members. However, in our experience, the benefits far exceed the risks.

In addition to the oversight role of the international boards, it is important that national boards have the opportunity to keep abreast of the process, to give input where it makes sense, and ultimately be informed and prepared to approve and fully buy into the emerging strategic plan.

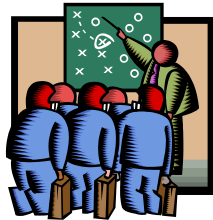
Example structure for global strategic review

Exhibit 4



Working Groups

A small number of Working Groups (normally three to five) are created to tackle related, prioritised strategic questions. Each group is made up of five to seven members, and carefully selected based on expertise, perspectives, analytical rigor and critical thinking skills. Importantly, they need to be able to contribute and make recommendations on behalf of the entire agency, leaving aside the priorities and possibly narrower perspectives of their day-to-day departments & roles. Not always easy! Ensuring these working groups are empowered and trusted by the agency is a crucial ingredient for success.



In addition, it may be helpful for each working group to have an **executive sponsor** to provide an effective linkage between the working group and the senior leadership team. Sponsors should be

encouraged to join the dialogue as a peer, rather than in their capacity as a member of the executive leadership team. The sponsor should remain sufficiently close to the emerging thinking and analysis to be able to represent emerging thinking and recommendations in future deliberations of the international executive leadership team.

Working group members will typically be part time, devoting about 25 to 50% of their time especially during the intensive stages of Step 2 – Making Choices.

Strategy Integration Team

The strategy integration team is the central unit that manages the strategy review process on a day-to-day basis. It works with the international executive leadership team, the working groups and other key groups to steer the process to its successful conclusion.

For example, at its core, the strategy integration team could have two or three extremely respected and capable full-time people. The composition of the team needs to be designed to: a) have considerable knowledge of the work of the agency, b) have credibility with senior and middle management, c) have independent thinkers, open to new proposals, and d) be comfortable with the process and decision-making requirements of managing a global strategic review. This team needs to be able to direct, challenge, support and integrate the thinking of the various working groups. It also needs to be comfortable commissioning the data collection, analysis or research to supplement and test emerging recommendations.

The strategy integration team will work seamlessly with the working group leads, effectively acting as an extended integration team. In the later stages of the review, as the working groups are dissolved, it is possible that some of the working group leads will become part of the strategy integration team assisting to draft the final strategic plan.

Strategy Support Team

The entire process can hugely benefit from the active support of important functional skills throughout each of the main steps. This would usually include three important disciplines:

- **Internal communications:** This is an important ingredient of a good process and requires dedicated expertise. However, effective communication is a team game – and requires significant input and effort from all who are in leadership positions especially members of the international executive leadership team.
- **Business / financial modelling:** A solid quantitative model which brings together the financial and other important data is a great asset to any strategic planning process. This can provide a deeper and shared understanding of the key facts and challenges which confront the organisation. It can also help inform analysis of strategic questions, recommendations and implications.
- **Administration and technical support:** Yes – for large organisations with complex governance structures – having a dedicated person to anchor all the administrative aspects can be gold-dust, for example, helping organise the bigger meetings whether face-to-face or virtual. That person can ensure that the time of all participants who contribute to the various teams and groups is used as effectively as possible.

Internal Reference Groups

In contrast to working groups, internal reference groups provide input and feedback based primarily on the perspectives and priorities of their department or part of the agency. Their involvement will be significantly less onerous than that of working group members – providing input at a few carefully chosen points in the process. For example, they could contribute when the key strategic questions are properly framed, and/or later as a sounding board for working group recommendations. Some of these groups may already exist within the agency, while others may be specifically created for the purpose of the review. Typically, members of reference teams will need to devote one to two days per month to fulfil their role.

‘Points of progress’: Green, White and Blue papers



Given the broad scale and scope of an entire international agency, spanning 50 to 100 countries and numerous areas of focus, it can be useful to have clear “points of progress” i.e., the milestones to be met by working groups during the strategy process. These milestones will broadly define the extent of the progress made by working groups on a particular strategic question. On reaching these points, it would be important to seek an external reaction from the integration team and in some cases, the senior leadership team. These

can also be effective points at which to engage reaction and feedback from the reference groups.

The following {Green-> White-> Blue} structure is an approach which we have found to be very helpful in multiple projects. Green papers frame the strategic question. These develop to White when the question has been well researched and when there are clear emerging choices/recommendations. These evolve into blue papers when the working groups have come to a proposed recommendation, and when implications are well thought through. A little more one each of these:

- **Green Paper:** A short (*half to one page*) note for each of the most important strategic questions/choices; setting out the key discontinuities that prompt this particular question (could be an opportunity/ challenge/ problem); and some hypotheses of potential choices/solution options.
- **White Paper:** This is the next iteration of the Green Paper, with a more thorough view of the issues and choices, and with firmer data and evidence on the key factors prompting the strategic question. It will have a more developed view of key choices and trade-offs, ideally narrowed down to two to three firm alternatives. These could usefully be shared with other groups and teams to challenge and provide feedback.
- **Blue Paper:** The next iteration of the paper will have a firm recommendation of the preferred response or choice, a clear rationale underpinning the recommendation, as well as a view of some of the key implications (e.g. benefits, cost, implied degree of change & risk).

This process should help facilitate the input of the reference teams in a timely and effective way, and allow the strategy integration team, and members of the global leadership team, (*and boards where necessary*) to keep abreast of the progress of the review.

Variations and permutations

As indicated at the outset, there is not just one way of executing a strategic review; neither is there a right or wrong way. In the previous section, we outlined the basic phasing, structure and mechanics of one possible approach. However, there are many variants – each will have its own pros and cons.

During the pre-consultation phase, a detailed approach should be designed to fit the situation. It should respond to the nature of the strategic questions that are expected to be tackled. Potential variations will be driven by the desired pace in conducting the review, - perhaps there are some large and urgent strategic issues that need to be addressed before other questions can be usefully tackled. Variations can also be influenced by the degree of participation needed/expected or the perceived need for a radical overhaul of the agency's strategic direction.

There is sometimes a perception that a highly participative process is likely to produce a less innovative or less radical solution. We do not concur with this perspective. If a process is properly constructed and managed, with clear governance and with genuine and focused participation, it is possible to identify innovative and radical recommendations. Meaningful participation will also provide a crucial opportunity to help the organisation make the necessary transition in thinking and understanding as the strategic review progresses, rather than waiting to sell the new ideas when the review is complete. This will make the job of implementing the resultant changes significantly easier. If the senior leadership team feels that a significant change of course is demanded, participation becomes even more important.

However, if the remit of the strategic review is to provide a confirmation of the mission and direction already in place, merely framing some more specific goals and targets to update the previous strategic plan, then a much more focused team structure and simplified review process will suffice. Similarly, if the scope of the strategic questions to be tackled

from the outset is narrow, for example, if there are only one or two big questions that need to be tackled at a fundamental level, then the structure and process need to be adjusted accordingly.

The following are some possible variations that could be considered. Each of these variants is reviewed in Exhibit 4, with associated pros and cons.

Variation A: Conduct the review over a longer period, perhaps extended to 12 to 18 months. This would, potentially, allow for some more logical sequencing when tackling interdependent questions. It would also allow time for collecting important research information as the work proceeds.

Variation B: A single larger and hands-on integrated working team, essentially an expanded version of the strategy integration team. In this approach the working groups can still exist, but with a much lighter touch, i.e., they could help provide input, discuss ideas and choices, but are not asked to take full ownership of the work needed to get to final recommendations.

Variation C: Nominated members of the international executive leadership team, or a subset of that team, takes on the role of the “Strategy Integration Team”, ensuring that the leadership team is integrally involved in all aspects of developing the new strategy.

Exhibit 5 - Some variations in approach

Variant	Pros	Cons	Suitable where
A) Conducting the review over a longer period	<ul style="list-style-type: none"> Easier to sequence efforts to respond to inter-dependent questions. 	<ul style="list-style-type: none"> Harder to retain engagement across the organisation over an extended period (more than six to nine months). Risk of loss or dilution of momentum in converting emerging directions to clear goals and creating a solid strategic “results template”. Risk of costs of process becoming excessive. 	<ul style="list-style-type: none"> Where there is a natural sequencing – i.e. where one or two critical questions need to be answered before others can be tackled productively.
B) A single full-time working group, instead of three to five part-time working groups	<ul style="list-style-type: none"> Easier to manage and integrate thinking. 	<ul style="list-style-type: none"> Weaker participation and diversity of expertise devoted to each of the strategic questions. 	<ul style="list-style-type: none"> The scope of strategic questions is narrow Where the broader organisation can trust a smaller group of people to consider the key choices and come up with robust and acceptable recommendations.
C) The global senior leadership/management team, or subset of, takes on the role of the “Strategy Integration Team”	<ul style="list-style-type: none"> Increases the opportunity of all members of the senior team getting immersed in the thinking and decisions. Increases ownership of the final strategy. Can stimulate some content debate between members of the senior team beyond the normal scope, providing opportunity for a more cohesive team in the long run. 	<ul style="list-style-type: none"> The feasibility of individual team members devoting sufficient time to fulfil the role must be questioned. Poor interpersonal dynamics between the team can hamper meaningful debate and decision-making. The members of this team may not have a sufficiently open-minded perspective. 	<ul style="list-style-type: none"> Can be effective where there is a small, well-functioning and respected global leadership team.

4. Connecting a strategic plan with ongoing planning and management of any agency

As you embark on a new strategic planning process, it can be worth taking a step back and reflecting on how a strategic review fits into the ongoing planning and management activities for any international NGO.

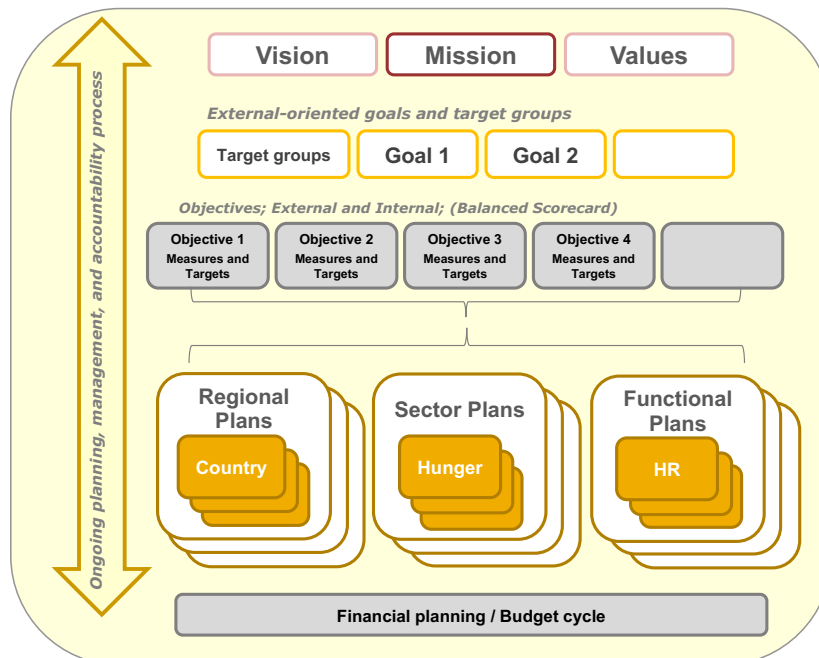
Too often, strategic reviews can be accused of becoming an island of analysis, debate and decisions, and not sufficiently connected to the previous progress, direction and momentum. We are not implying that a strategic review cannot or should not result in a change of direction or focus. Clearly this may well be required. However, it should build on what is already in place where at all possible. This means that it is more likely to refine

external goals and business objectives, not invent a totally new set of goals and definitions. It might challenge and potentially refine the agencies mission, vision and values, but in some cases, these may not change materially as a result of a strategic review.

The diagram set out in Exhibit 6 is one of the most important illustrations in this paper as it attempts to position a strategic review, as a one-off exercise, typically conducted every five or so years (right hand side of diagram) in the context of the ongoing components of a planning and management framework of any large international agency.

Strategic reviews and the ongoing planning framework

Exhibit 6



Components of an agencies planning and management framework

Commenting on this diagram, let us touch briefly on the components we would expect to find in any international NGO. The final strategic plan should be able to speak to all of these components, noting clearly what changes are expected in the years ahead.

At the top, all agencies will have some statements which define the following:

- ❖ **Vision** (*often defined as how the agency believes the world should ideally be, for example a world without poverty, hunger and injustice*)
- ❖ **Mission** (*the specific aim or purpose of this agency in contributing to that vision*) and,
- ❖ **Values** (*the beliefs or principles that the organisation holds dear and guides how it goes about it's work*).

Underneath these, particularly driven by the mission, are a **set of goals**, typically externally facing. These define what the organisation is seeking to contribute over the next number of years in terms of targeted changes, such as progress in reducing poverty, hunger and injustice. At this level, we can also see a definition of the target groups that the agency is seeking to particularly focus on in the pursuit of its mission.

These externally oriented goals are often translated into a set of **concrete objectives**, which are likely to be a mix of externally facing objectives, a more specific definition of the external goals, as well as some very important internally oriented objectives, for example, concerning the organisational capability, capacity, reach or reputation. A good way of thinking of this mix is through the '*Balanced Scorecard*' approach that has become well accepted in the private sector² and is increasingly becoming more common in the development and humanitarian arena. Much has been written about lessons and techniques in the implementation of this approach, including how it can be used in the

² Robert S. Kaplan and David P. Norton, *The Balanced Scorecard* (Harvard Business School Press, 1996)

not-for-profit sector. A good example is the book by Paul Niven, titled *Balanced Scorecard for Government and Nonprofit Agencies*³.

These objectives are then translated into meaningful **metrics and targets** as appropriate. In turn, these should be carefully aligned with **local plans at country, sector or functional levels** and, of course, aligned with individual objectives as part of the individual performance management process.

Finally, we would like to draw your attention to the long vertical arrow on the left of the chart called "*Ongoing planning, management and accountability process*". This is a sensitive topic – as, despite much progress in recent years – it can often be a weak link. This process is often disjointed, not taken seriously or in some cases non-existent. We have touched on this in Chapter 1, and in more detail in Chapter 6, of our earlier publication '*Building a Better international NGO*'. This process can, if it operates effectively, ensure that the overall goals and objectives at an organisational wide level are useful and practical. Importantly it also connects the strategic externally facing goals with the objectives, measures and targets throughout the organisation. This is critical part of the organisational glue, to ensure that the focus, goals, objectives and ongoing progress of the entire organisation are aligned.

How a strategic review, as a once off exercise, links with the ongoing planning framework

When we conduct a strategic review, we will refresh and update the left part of the diagram in Exhibit 6, starting at the higher levels in that exhibit, and put in place a foundation for the subsequent refreshment of plans at country, sector and functional levels. In doing this, it is useful to be aware of the tricky balance between continuity and consistency on one hand, with changes and

³ Paul R. Niven, *Balanced scorecard for Government and Nonprofit Agencies* (New jersey, John Wiley & Sons, Inc., 2008)

refinements which are urgently needed on the other.

Starting at the top level of Exhibit 6, the three components (Vision, Mission and Values) are typically discussed and reviewed at some level during a strategic review, though may remain reasonably consistent through multiple planning periods. However, at the next level, externally facing goals, objectives and metrics will come under considerable scrutiny and will often be refined or changed, because previous goals have already been met, perhaps have been found to be unhelpful, or because new learning or insight indicates that there are more effective goals or objectives that will better guide the organisation into the future.

How do recommendations get implemented in reality?

We feel it is important to clarify up front how the recommendations and decisions made during a strategic review are likely to get implemented. The short answer may be to say – through an implementation plan – however, there are three main ways this comes about - specifically:

1. Through immediate **decisions and policy changes**. This could be on several dimensions –

for example, *“We will stop pursuing these kinds of projects, or will undertake them in a different way from this point forward”*.

2. Through an update or refinement of the **goals and objectives framework** for the entire organisation. These revised goals and objectives will get translated into metrics and targets for the entire global organisation flowing through to updates to country, domain and functional plans. This will in turn guide a range of management decisions and priorities in the years ahead.
3. Through **one-off projects** which are deemed necessary to put in place the decisions, directions and changes that are implied by the new strategic plan – where the way forward cannot be delivered by routes one and two above, as they need special investment and effort to achieve the changes desired within an acceptable timeframe. Examples include work to build or update capacity, skills or to implement new IT systems.

5. Questions and Answers

Q1. How long does a global strategic review need to take?

In our experience, excluding the pre-consultation phase, a strategic review should take between six and nine months. The pre-consultation phase typically takes a minimum of four to six weeks. It can be done over a longer period if preferred. This phase should be understood by the organization as the 'shaping and framing' preparatory work for the strategic review.

Stages 1, 2 and 3 (together) typically take four to six months. In our experience, this is the minimum time needed to be able to create meaningful debate, support that debate with reasonable analysis and the collection of important information, and consider the recommendations in a thoughtful manner.

This could be allowed to extend over a longer period. However, this can create some risks. For example, the organisation may not be able to stay focused and waste undue time getting to concrete recommendations. There is an associated risk that the strategy process may excessively distract the organisation from its day-to-day work. In addition, the best people who you want to be at the heart of the review may become increasingly interrupted by unavoidable calls on their time from day-to-day issues.

The final phase (Step 4), namely producing an integrated strategic plan, typically takes one to two months. Again, this should not be dragged out as it will risk loss of focus and undermine the momentum created during the earlier stages of the review.

Q2. How much should the international board, and the various other boards be engaged during the strategic review?

It is important to engage the various boards in a clear and authentic manner. This begins in the pre-consultation phase on practical issues such as the timing and scope of the review and agreeing upfront how and when they will be kept informed, and, if deemed appropriate, to contribute to the deliberations. It is important to set out

clearly, at what points in the strategic review processes they will be called upon to make decisions.

During the core stages of the work, having a small number of carefully selected board members involved in a hands-on capacity can be valuable. They could, for example, contribute as ordinary work group members based on their individual experience or expertise. However, it is important that their participation at this level is as an ordinary working group member, and that their board level status does not give their opinions and contributions any more weight than other workgroup members.

Q3. What is an example of a strategic question?

This will be different in every situation. Some of the strategic questions that we have come across have been included in Exhibit 3 (earlier in this paper).

Q4. Should you consult with the real stakeholders in poor communities, i.e., the beneficiaries?

Proper and genuine consultation at the appropriate times and levels can be very useful – but! .. needs to be very carefully carried out to be practical, meaningful and authentic. Too often, consultation at this level is symbolic, tokenistic, perhaps not representative, or the input is not available in time to be useful. In the future, when agencies have more robust planning, performance and accountability processes, with ongoing and systematic feedback from all stakeholders, this kind of information can be considered on a continuous loop – rather than as a rushed exercise at the outset of a strategic planning process.

Q5. How do you deal with the logistics of enabling teams to contribute effectively and work as high performing units when they are scattered across the world?

Most agencies are discovering the real benefits of effective virtual team working for much of their day-to-day work. Remote working through Teams or Zoom is

becoming a very efficient way of working for all international teams - and most organisations are becoming skilled at using this new approach, eliminating travel cost and travel time – despite the well discussed drawbacks. In addition, considerable progress can be made by effective delegation of tasks within the working groups, as well as making good use of technology for review of analysis and sharing of information.

However, for these sensitive and sometimes complex strategic questions, we believe there is significant benefit in some face-to-face interaction, in addition to ongoing virtual work. Typically, working groups will need at least one or two, (sometimes more) concentrated face-to-face working sessions over several days especially during Step 2 – ‘Making Choices’.

Q6. Who decides and how do decisions get made in practice?

There is a formal and informal answer to this question. Earlier, at a working group level, decisions should ideally emerge through consensus from the group. This typically (though not always) occurs as groups debate the necessary facts or information and reach a shared understanding of the key aspects related to a particular question. In certain cases, a working group may seek guidance from the global leadership team on a particular issue.

Formally, the global leadership team will make a call on the key strategic recommendations that are presented to the various boards for review and agreement. It would, however, be unusual for this team to make a decision that was not in line with the views of a working group that it had entrusted to tackle the issue. Indeed, as individual members of the global team may also sit as normal members of working groups, or as “executive sponsors”, debate should ideally be going on at both levels on some of the thorniest issues during the intensive periods of the review.

To reemphasise what we touched on in Section 2, one of the key definitions of success for a strategic review is to bring the organisation together intellectually and emotionally, and to create alignment behind the future direction and plan.

Q7. How to achieve a balance between gaining clarity and continuity on direction and goals, whilst retaining the flexibility to respond to ongoing changes in the external environment?

A robust strategic plan should result in a clear aligned direction, with a robust set of goals, metrics and priorities. However, it is important to realise that a strategic plan is not a rigid “straight jacket”. Of course, senior leadership need to be able to respond to major unanticipated events as and when they emerge.

In fact, a clear strategic plan can be a vital mechanism to help change course should the need arise. It can provide the basis to explain any change in course with stakeholders inside and outside the organisation. Put bluntly, it is very hard to explain a change in course, unless you are very clear on the direction in which you are already travelling. Without that clarity, new demands tend to be added to an already overloaded, poorly prioritised agenda and the ultimate contribution of the agency is likely to be severely diminished.

Q8. How do you ensure that an organisation is (re)energised, during the development of a new strategic plan?

*This is a very important issue to consider as you design the process of a strategic review. It is important to reflect carefully on the balance of the emerging recommendations. One way of thinking about this is to ensure a reasonable balance between what we call the ‘**motivating glue**’ for the agency, the glue that inspires people to be part of the agencies mission, and what we call the ‘**enabling glue**’, those necessary enabling processes and systems that form the functional backbone of an international agency, and which are often a considerable challenge to progress.*

A big mistake is to derive a set of recommendations which lean too much, or exclusively, on the “enabling” rather than the “motivating glue” of the agency. Excessive emphasis on enabling may well be a rational response to some of the major strategic questions, however, it is important that an agency also gives due attention towards refreshing and strengthening the motivating glue, and where possible, positioning changes to strengthen enabling systems, processes and structures, in terms of their contribution to the “motivating glue”.

Q9. How do you ensure that the strategic plan gets implemented?

Translating the results of a strategic review into an implementable plan is often a challenge, for a few very understandable reasons. For example, it is all too easy for working groups to get disbanded whilst the recommendations are agreed and move back to their normal roles before a clear implementation plan is developed.

A few important suggestions...

- a) *Define clear tangible goals for each of the strategic recommendations before key people from the work groups are fully released from their strategic review commitments. There is nothing more frustrating or wasteful than having new people who do not have the depth of understanding of what was intended, trying to create goals and plans after the strategic review is completed.*
- b) *Map these tangible goals (by the same people) onto a “strategic results template”. This is essentially a practical way of showing how the changes demanded are mapped on to various components of the organisation, e.g., policy and methodology, roles and skills, processes and systems, culture and behaviour, fundraising, cost and investment, infrastructure and structure. Where there is a pre-existing and well-functioning global planning and performance framework, this step will be significantly easier.*
- c) *Make sure this results template covers all parts of the organisation, - programme offices, funding offices, central or shared functions; each will then need to do its own local mapping as part of its own planning cycle.*
- d) *Appoint, at the outset of Step 4, an implementation lead to oversee the changes implied by the new strategy. This should be an individual who has a deep understanding of the strategic plan as well as strong credibility throughout the organisation. If this is not a member of the Integration team (preferred), use Step 4 as an opportunity for that person to overlap with the strategy integration team.*
- e) *Before the plan is finalised, be completely clear on the investment and management time needed. If there are insufficient resources or ‘organisational bandwidth’ to follow through on everything recommended, it is far better to adjust the timing/phasing and, if necessary, to prioritise—rather than losing credibility later when expectations are not met.*
- f) *Ensure implementation is sufficiently rapid so that staff across the organisation can quickly see the concrete changes desired and the positive momentum created by the planning process is maintained. As a guideline, we are keen on the “18-month half-life rule”. By that we mean that at least half of all of the changes implied by the new strategic plan are implemented on the ground within 18 months.*

ABOUT THE AUTHORS

James Crowley

James is a strategic advisor with more than 35 years' experience helping a variety of large private and public-sector organisations and, since 2006, a range of large international NGOs in the international development and humanitarian sector.

After an early career as a structural engineer, and following an MBA at London Business School, James joined Accenture's strategic consulting practice in 1989, became a Partner in 1997 and worked across a range of strategy and organisation change issues for energy, consumer products, high tech and public sector companies. He has worked with international clients such as SmithKline Beecham, Hewlett Packard, Shell, British Gas as well as a raft of other large energy companies. Up to 2005, James led one of Accenture's strategy practices in the UK & Ireland and was the practice lead for the European Mergers, Acquisitions and Alliances practice for many years.

James formally left Accenture's commercial practice in 2005 to focus on strategic and organisational performance issues in the development sector. However, he continued to work extensively with Accenture's not-for-profit practice, ADP (*Accenture Development Partnerships*), and led a range of assignments for international NGOs – examples include Plan International, AMREF, Action Against Hunger, CRS, Care International, World Vision, Amnesty International, VSO and Action Aid.

In parallel with ongoing advisory work, James spends a portion of his time on new independent thought pieces which aim to stimulate new ideas around the effectiveness of large international NGOs. This led to his first book, *'Building a better international NGO'* published by Kumarian Press in the US in 2013. The second, titled *'Navigating Change for INGOs'*, (also through Kumarian Press) was published in 2016. More recently, he released a major new leadership paper, this time on LinkedIn, titled *'Rebuilding iNGO Leadership'*. More on all of these and links on website [www.thecrowleyinstitute.org]

James holds a first-class honours degree in Civil Engineering from University College Cork, a masters in offshore engineering from University College London, and an MBA from London Business School.

Morgana Ryan

Morgana was a Senior Manager at Accenture with experience from a range of strategic, business process and IT assignments spanning the private and development sectors.

Morgana joined Accenture in 1997 and for a number of years her primary focus was working with large Utility and international Oil companies, including Energy Australia, Transalta and Shell Exploration and Production. This gave her the opportunity to work in Australia, the Middle East, Europe and Asia.

In recent years she has dedicated her focus towards the international development sector, applying her skills and experiences with Accenture Development Partnerships (ADP), a non-for-profit organization within Accenture. Morgana is currently the Asia Pacific Lead for ADP. Morgana has been privileged to work with some of the world's largest international NGOs, at multiple levels; designing and implementing improvements at International HQ/ Secretariat, National organisations, regional and country levels. This work has largely focused on how complex international NGOs with limited resources can operate to achieve more together, particularly when faced with significant geographic and programmatic footprints. Recent clients include Oxfam International, Amnesty International, Plan International, Save the Children and Catholic Relief Services.

Whilst working on these projects, Morgana was struck by how little literature is available on operational and structural aspects of managing and International NGO organisations at a practical level in the quest for better organisational performance. On this basis Morgana and James Crowley sought to collaborate to share their commercial and development sector experiences as a reference for those working in international development.

After a stint as Board member of Care Australia, in 2024 she has become CEO of Care Australia.

Morgana holds a first-class honours degree in Economics from Monash University – Clayton, Australia.

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