
Institutional Strategy Toolkit – NGO and Civil Society Edition

For NGOs, foundations and civil society organisations

Executive-level toolkit for governance, decision-making and strategic execution

Introduction

This toolkit supports NGOs, civil society organisations, foundations and advocacy networks in strengthening governance, clarifying decision-making, improving accountability to communities and donors and aligning leadership, programmes and operations with mission and strategic priorities.

Contents

- Mission and Governance Alignment Map
- Board and Executive Decision Framework
- Programme, Partnership and Delegation Review
- Donor, Compliance and Safeguarding Risk Matrix
- Organisational Strengthening Roadmap

How to Use This Toolkit

Step 1. Select the edition that fits your organisation and identify the board and leadership team who will review the outputs.

Step 2. Work through governance, delegation, programme alignment, compliance and risk in sequence.

Step 3. Use the templates to capture operational realities as well as strategic priorities.

Step 4. Share outputs with leadership and board members to support clearer authority and stronger accountability.

Step 5. Convert the findings into a phased roadmap that aligns mission, governance and delivery.

Core Tools

Each tool can be used independently or as part of a full institutional review.

Strategy Architecture Map

Purpose: To provide a high-level view of how the institution is structured to deliver on its mission.

Components

- Governance Structure Review
- Decision Rights Mapping
- Leadership Role Alignment

Outputs

- Organisational structure map
- Decision-rights matrix
- Leadership alignment brief

Policy and Process Strategy Scan

Purpose: To identify gaps, inconsistencies and outdated policies or processes that undermine performance.

Components

- Policy Inventory
- Process Maturity Scan
- Compliance and Risk Touchpoints

Outputs

- Policy gap list
- Process maturity score
- Compliance and risk exposure summary

Strategic Decision-Making Framework

Purpose: To create a clear and consistent model for decision-making across the institution.

Components

- Authority and Escalation Pathways
- Cross-Functional Decision Protocols
- Executive Alignment Brief

Outputs

- Decision-flow diagram
- Cross-functional decision protocol

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- Executive alignment summary

Institutional Risk Strategy Matrix

Purpose: To elevate risk from operational noise to strategic oversight.

Components

- Risk Identification
- Likelihood and Impact Scoring
- Mitigation Strategy Design
- Accountability Assignment

Outputs

- Risk register
- Risk scoring matrix
- Mitigation strategy plan
- Accountability assignments

Strategy Execution Roadmap

Purpose: To provide a realistic phased approach to institutional strengthening.

Components

- Diagnostic
- Design
- Implementation
- Monitoring
- Sustainability

Outputs

- Phased implementation plan
- Monitoring schedule
- Sustainability checklist

For tailored advisory support, contact Kim Young to adapt this toolkit to your institutional context.