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Strategic Alignment as a Lever for Organizational Transformation within Non-Governmental Organizations (NGOs)

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Abstract
This article examines strategic alignment as a fundamental lever for organizational transformation within non-governmental organizations (NGOs). Using a case study methodology, this research analyzes the trajectory and structure of the Community Action Developer Canada organization. The study highlights, as key findings, a set of transferable best practices focused on developing effective strategic governance, using decision-making and strategic monitoring tools, and implementing a structured project portfolio management framework. The research findings from the cross-sectional analyses underscore the idea that rigorous project structuring within NGOs and appropriate management tools enable the maintenance of good governance.
The article also analyzes how these exemplary management practices contribute to improving the intended purpose in the management of activities within NGOs.

Keywords: Strategic alignment, Organizational transformation, Case study, Strategic governance, Project portfolio management, Best practices, Community Action Canada developer

1. Introduction

In the context of non-governmental organizations (NGOs), where organizations are often called upon to continually adapt and address the challenges of limited resources, investor dependence, and ever-increasing demands for social impact (Gomes & Romão, 2015)[10], portfolio management emerges as a crucial lever enabling these organizations to structure, prioritize, and effectively manage their projects. However, it is essential to emphasize that simply implementing project portfolio management mechanisms is insufficient to guarantee the achievement of NGOs' strategic objectives. This is where strategic alignment comes in, ensuring that the right projects are selected in accordance with the organization's mission, vision, and organizational goals. Therefore, aligning an organization's overall strategy with the projects that comprise its portfolio is a key factor in optimizing resource allocation and supporting the organizational transformations necessary for an NGO's sustainability. (Gomes & Romão, 2015)[10]

This research follows this same logic, focusing on strategic alignment as a success factor in managing a portfolio of projects within NGOs. The research question, " *How does strategic alignment constitute a major lever for organizational transformation through the management of NGO project portfolios?* ", primarily aims to understand the role of strategic alignment in steering project portfolios and its impact on the organizational transformation of NGOs.

To this end, this work is structured in several sections. First, the context and relevance of the research question will be presented, highlighting the specific challenges faced by NGOs. Next, a literature review will analyze the content of the articles, followed by the definition of key concepts. This analysis will be followed by a critical synthesis highlighting the limitations of existing work and proposing best practices related to the strategic alignment of NGOs. Afterward, the case of the non-governmental organization Community Action Developer Canada will be explored, and finally, practical recommendations will be formulated to improve strategic alignment within NGOs.

2. Context and Relevance of The Research Question

Nowadays, projects are unavoidable and found in all kinds of organizations (public, NGOs, non-profits, and private). However, numerous studies show that project failure is very common. According to Corriveau (2012) [7], between 60 and 70% of projects fail, 28 to 50% are never completed or are abandoned, while 50 to 75% exceed their initial budgets or deadlines. Furthermore, 83% of projects do not meet performance requirements, 20 to 30% do not meet stakeholder expectations, and less than a third actually achieve their objectives.(Corriveau, 2012)[7]

This data demonstrates that, in general, project management faces challenges The numerous difficulties involved in project implementation are significant, and it is not an easy task in many organizations. The challenges encountered during project implementation are even more pronounced in the case of non-governmental organizations (NGOs) because they operate in an increasingly complex environment, "characterized by limited resources, increased dependence on external funding, and high expectations for social impact," as Gomes & Romão (2015) [10] point out. This increases the risk of misallocation of their resources, which reduces their capacity to effectively meet the needs of populations and produce sustainable results. Furthermore, it is observed that despite the existence of defined organizational strategies, the projects implemented do not always contribute effectively to their achievement. According to Corriveau (2012) [7], one of the main causes of these failures and difficulties is the lack of coherence between strategic objectives and selected projects, as well as "insufficiently structured governance and prioritization mechanisms."

In this context, strategic alignment becomes essential as it ensures coherence between the mission, the strategic objectives of NGOs, stakeholder expectations, and the projects implemented. Excellent project portfolio management therefore appears crucial for aligning project decisions with the strategic directions of these organizations. Thus, the research question, "How does strategic alignment constitute a major lever for organizational transformation through the project portfolio management of NGOs?" is highly relevant. Its aim is to better understand how NGOs can improve their performance by strengthening the coherence and strategy of their projects.

2.1. The Challenges of Non-Governmental Organizations (NGOs)

NGOs regularly face numerous challenges that complicate project management and often negatively impact the achievement of their objectives. Unlike for-profit organizations and businesses, they must combine social impact goals with extremely limited resources, highly competitive funding, and high stakeholder expectations. According to Azevedo, Lee, and Shi (2024) [2], these contexts demand significant organizational agility and rapid adaptation, reinforcing the importance of strategic alignment to effectively redirect projects in response to evolving circumstances.

Their reliance primarily on grants or financial donations makes long-term project planning difficult and uncertain. According to Lacerda, Martens, and Freitas (2016) [13], this financial constraint necessitates rigorous project management to optimize resource use and maximize social impact.

Furthermore, the diversity of their stakeholders (including beneficiaries, donors, partners, public authorities, etc.) creates situations where these NGOs regularly face conflicting demands, further complicating decision-making and potentially leading to a dispersion of priorities. This makes maintaining strategic coherence difficult if intentional strategic alignment has not been established. Similarly, it also demonstrates the need to implement governance and prioritization mechanisms to effectively align their projects with their mission.

Another challenge stems from the fact that many NGOs develop projects without a defined strategy or established structures, but rather in response to available funding. This situation leads to a lack of strategic alignment and a dispersion of organizational efforts. In this regard, Kopmann *et al.* (2017) [12] emphasize that the absence of structured project portfolio management limits organizations' ability to effectively translate their strategy into concrete actions.

Thus, all these challenges faced by NGOs demonstrate the need to strengthen strategic management tools and practices, particularly through strategic alignment and project portfolio management.

2.2. The Role of Project Portfolio Management in NGOS

In the context of NGOs, project portfolio management (PPM) plays a crucial role in preventing the dispersion of efforts, improving the performance of these organizations, and supporting their organizational transformation. Indeed, it allows for the optimization of resource allocation, the strategic prioritization of initiatives, and the translation of organizational strategy into coherent and measurable actions. As Zarka and Guerrier (2025) [21] emphasize, PPM "is emerging as an essential strategic lever" by providing an overview of projects and facilitating their prioritization based on the value created for the organization. (Zarka & Guerrier, 2025)[21] Project portfolio management enables NGOs to better coordinate their actions and ensure that each project effectively contributes to the social mission. It also facilitates decision-making and allows for the adjustment of priorities in response to changes. It appears as a lever for improving strategic coherence, for "maximizing the value created by all projects aligned with organizational objectives," and for supporting the overall performance of these organizations.(Zarka & Guerrier, 2025)[21]

2.3. Strategic Alignment as A Lever for Organizational Transformation in NGOs

In a context marked by uncertainty, unstable environments, and the pressure to deliver satisfactory results, organizational transformation is becoming a crucial issue for NGOs. To achieve this, strategic alignment emerges as the central mechanism for carrying out this transformation coherently and effectively. Indeed, alignment between mission, strategic objectives, and projects allows for "structuring collective action around a shared vision." (Henderson & H. Venkatraman, 1993)[11] Strategic alignment ensures coherence between strategic objectives and implemented projects. Couprie emphasizes that the legitimacy of NGOs depends on their ability to demonstrate coherence between their actions and their mission, thus giving strategic alignment a structuring function in their organizational evolution (Couprie, 2012)[8]. It constitutes a true lever for organizational transformation for NGOs because it allows

them not only to improve their performance but also to strengthen their social impact and to continuously adapt to changes in their environment. By guiding decisions and priorities, strategic alignment acts as a driver of transformation, enabling NGOs to improve their operational efficiency and strengthen their social impact.

3. Literature Review

This literature review employs a qualitative and analytical approach to understand how researchers and practitioners address strategic alignment in project portfolio management and its role in organizational transformation, particularly within the context of non-governmental organizations (NGOs). It seeks to highlight the models and mechanisms that ensure coherence between strategic objectives and implemented projects. The selection of articles was guided by their contributions to the concepts of strategic alignment, project portfolio management, and organizational transformation. Furthermore, they offer diverse approaches, including conceptual models, analyses, and case studies, thus providing a comprehensive understanding of the research question.

The selected articles were chosen for their ability to illuminate, from distinct yet complementary perspectives, the role of project portfolio management (PPM) as a lever for organizational transformation within non-profit organizations (NGOs). Each selected contribution offers a specific perspective on how strategic alignment influences mechanisms for prioritization, resource allocation, and organizational adaptation.

In their work, Oudeh *et al* (2023) [18] propose a conceptual framework aimed at strengthening the alignment between project portfolios and strategic objectives in project-oriented organizations. Their approach is based on the integration of Balance Scorecard (BSC) and portfolio management, with a view to creating a common vision of organizational priorities. The authors emphasize that strategic alignment should be viewed as a process of interpreting and translating strategy, rather than mere compliance. In other words, it involves ensuring that each project embodies a part of the strategy, while allowing for dynamic adaptation to operational constraints. The article also highlights the need for shared governance, where stakeholders actively participate in project prioritization. This approach fosters transparency, accountability, and consistent decision-making. Oudeh *et al*. (2023) [18] conclude that the success of strategic alignment depends on the ability to establish explicit links between strategic performance indicators and project selection criteria.

Meskendahl 's (2010) [17] study expands upon the work initiated by Archer and Ghasemzadeh (1999) [1] by analyzing the link between business strategy, portfolio management, and organizational performance. His conceptual framework establishes that the success of a portfolio depends on the clarity of the corporate strategy and the ability to align investment decisions with that strategy. He emphasizes the idea that portfolios are not simply groupings of projects, but rather levers for implementing strategy. The author introduces the concepts of strategic fit and contribution to organizational success, according to which prioritization should be based on explicit strategic criteria, such as competitiveness, customer value, or innovation.

The study also identifies key success factors: strategic communication between hierarchical levels, alignment between portfolio objectives and those of the organization, and the flexibility of the decision-making process. The author concludes that portfolio performance cannot be measured solely in financial terms, but also according to qualitative criteria reflecting the contribution to the overall strategy.

Masood's thesis (2024) [16] offers an applied perspective on selection and prioritization in portfolio management. Drawing on case studies and empirical observations, the author examines how organizations implement existing theoretical frameworks in real-world contexts.

The contribution of this study lies in its pragmatic approach: it proposes mechanisms for continuous portfolio adjustment, supported by decision-making dashboards and strategic review processes. This approach gives prioritization a dynamic dimension, rooted in organizational reality.

The study by Barbati *et al*. (2023) [3] introduces a multi-criteria methodology for selecting and prioritizing projects in organizational portfolios. Their approach is based on the application of Multiple Criteria Decision Analysis (MCDA), combining tools like AHP (Analytic Hierarchy Process) and TOPSIS (Technique for Order of Preference by Similarity to Ideal Solution).

This method allows for the simultaneous weighting of several criteria, such as strategic value, risk, resources required, and expected return. The authors demonstrate that multi-criteria tools offer a balanced perspective between quantitative rigor and qualitative flexibility, thus promoting more transparent and justifiable decisions.

The main contribution of this article lies in the formalization of a systematic and measurable approach to prioritization. Barbati and colleagues also emphasize the importance of involving stakeholders in the evaluation process to ensure the acceptability of decisions and the legitimacy of the final portfolio.

The seminal article by Archer and Ghasemzadeh (1999) [1] forms the conceptual basis for the study of the relationship between strategy and portfolio. These authors propose an integrated framework that structures the process of selecting and prioritizing projects according to a logic of strategic coherence and organizational added value. Their approach is distinguished by its desire to combine decision-making tools (such as multi-criteria analysis) with structured governance processes.

This systemic approach positions portfolio management as a dynamic and continuous process, where prioritization is not a one-off step, but a recurring governance activity. Archer and Ghasemzadeh's (1999) [1] major contribution lies in integrating the strategic and operational dimensions, thus ensuring consistency between planning and execution.

Overall, the extended review highlights a notable evolution in the literature: early works, such as those by Archer and Ghasemzadeh (1999) [1], laid the groundwork for a structured and integrated approach, while more recent contributions, notably those by Barbati and Oudeh, emphasize the adaptive and participatory dimension of the prioritization process. Masood (2024) [16] bridges the gap between theory and practice, highlighting the importance of flexibility and continuous management.

Ghonim *et al*. (2022) [9] make a major contribution to understanding the role of strategic alignment as a lever for organizational transformation. Their study highlights a mechanism that links strategic alignment to organizational performance, which is directly relevant to project portfolio management in NGOs. Indeed, the authors show that when

objectives, resources, and processes are aligned, organizations develop more effective decision-making capacity. This constitutes a fundamental lever for organizational transformation because it directly influences how priorities are defined, resources are allocated, and projects are selected within a portfolio.

The contribution of the article by Lacerda *et al* (2016) [13] is particularly relevant to the research question because they start from the observation that traditional portfolio management models do not adequately respond to the realities of NGOs and they present how portfolio management can become a crucial mechanism of transformation in NGOs.

They demonstrate that the presence of strategic alignment in NGOs transforms how these organizations select and prioritize their projects. The authors show that portfolio management, when oriented towards the organization's social mission, becomes a "strategic steering tool capable of reorganizing organizational priorities and limiting the dispersion of resources."

Kopmann *et al*. (2017) [12] provide additional theoretical depth by conceptualizing GPP not as a simple execution tool, but as a bridging mechanism between formal (deliberate) strategic planning and opportunistic (emergent) adaptation.

The Carreño Working Paper (2024) [4], from the Institute for Change Leadership, proposes an integrative and forward-looking vision by developing a framework for sustainable transformation through program management, emphasizing the congruence of objectives as the cornerstone of long-term performance.

From a more contextual and empirical perspective, Azevedo *et al*. (2024) [2] examine the specific role of information technology alignment in strengthening the organizational agility of NGOs in crisis situations, thus demonstrating the link between strategic coherence and the capacity for rapid adaptation. This literature review has highlighted the main limitations regarding strategic alignment within the NGO context.

A first common limitation lies in the limited generalizability of the results. Several studies rely on very specific contexts: a Brazilian medical association for Lacerda *et al*. (2016) [13], American organizations linked to the health crisis for Azevedo *et al*. (2024) [2], and an Egyptian public health directorate for Ghonim *et al*. (2020). These choices enrich contextual understanding but limit extrapolation to all NGOs.

A second limitation lies in the predominance of cross-sectional or prescriptive approaches. Kopmann *et al*. (2017) [12] themselves recommend multi-level and longitudinal research to better understand strategic emergence. Carreño (2024) [4], for his part, proposes a very rich but primarily normative framework with little direct empirical validation. Thus, the literature clearly explains what should be done, but less so how alignment is actually built over time within NGOs.

A third common limitation concerns the insufficient consideration given to the profound specificities of NGOs. Even when the third sector is studied, several frameworks remain inspired by the management of for-profit businesses. Azevedo *et al*. (2024) [2] acknowledge the need to broaden the definition of alignment in the non-profit context. Lacerda *et al*. (2016) [13] demonstrate precisely that existing models are mostly designed for for-profit organizations or funding bodies, hence the need for specific adaptation for implementing NGOs.

Finally, the literature still devotes limited attention to the human, political, and cultural dynamics of alignment. While Carreño (2024) [4] does mention silos, cultural resistance, and tensions between short- and long-term objectives, this dimension remains generally less operationalized than the technical or structural dimensions. Yet, in NGOs, these dimensions strongly influence the success of transformations.

This literature review provides a solid foundation for analyzing strategic alignment mechanisms and their contribution to organizational transformation through project portfolio management. In the context of NGOs, where resources are limited and objectives are often multiple, aligned decision-making is essential for prioritizing projects with high social impact. Strategic alignment thus constitutes a genuine operational mechanism that structures and guides choices within the project portfolio.

4. Key Concepts

According to Oudeh *et al*. (2023) [18], aligning project portfolios with strategic objectives is crucial for the success of project-oriented organizations. However, achieving this alignment is a complex task requiring a systematic approach. (Oudeh, Ghazimoradi, & Safehian, 2023)[18] To answer the research question, it is essential to clarify key concepts such as strategic alignment, project portfolio management, and organizational transformation to facilitate a better understanding of the analysis of the selected articles.

4.1. The Concept of Strategic Alignment

Strategic alignment refers to the coherence between a company's various strategic objectives and its activities. It can be understood as the degree of coherence between different organizational dimensions, including objectives, structures, processes, and resources. (Ghonim, Khashaba, Najaar, & Khashan, 2022)[9] Strategic alignment is also defined as "a dynamic process aimed at harmonizing all organizational resources, activities, and decisions with strategic objectives." (Volk & Zerfass, 2018)[20] In the field of project management, strategic alignment translates into the ability to select and prioritize projects based on their contribution to the organizational strategy. Thus, projects are no longer considered isolated initiatives, but rather instruments for creating strategic value, as highlighted by Ghonim *et al*. (2022) [9].

Strategic alignment is crucial to a company's success; however, beyond the theory, its practical application can be challenging and varies from one organization to another. For NGOs, it plays a vital role, ensuring consistency between their mission, stakeholder expectations, and implemented projects. It is therefore a key lever for maximizing social impact while optimizing the use of limited resources.

4.2. Project Portfolio Management

Project portfolio management involves mobilizing a set of processes and methods to manage groups of projects aligned with an organization's strategy. (PMI, 2021)Its objective is to provide guidance that optimizes resource utilization to achieve objectives and anticipates risks and returns to maintain portfolio balance. (Manyombe, 2026)[15] The goal is to maximize the organization's overall value and, consequently, the success of its projects. According to Kopmann *et al*. (2017) [12], project portfolio management plays a key role in strategy implementation by aligning project decisions with the organization's strategic direction.

In the context of NGOs, project portfolio management requires specific adaptations because traditional models must be adjusted to account for the particularities of non-profit organizations, including their focus on social impact, the diversity of stakeholders, and funding constraints.(Lacerda, Martens, & Freitas, 2016)[13]

4.3. Organizational Transformation

Organizational transformation is generally defined as a "complex and multidimensional process that involves a fundamental change in how an organization operates and creates value for its stakeholders." (Christou & Piller, 2024)[5] It also includes "an evolution of values, behaviors, and ways of working," thus reflecting a comprehensive organizational transformation oriented toward strategic objectives. (Clack, Smith, & Charns, 2025)[6] In project-oriented organizations, effective project coordination and prioritization facilitate the implementation of the changes necessary for their organizational transformation. In the context studied here, where NGOs often face the need to strengthen their social impact and adapt to unstable environments, organizational transformation takes on particular importance for ensuring the sustainability of these organizations.

5. Case of The Ngo Developer Community Action Canada

The value of incorporating the case of the NGO Community Development Canada into this work is twofold. Firstly, it grounds the theoretical reflection in a concrete organizational reality. Secondly, it provides an opportunity to test the concepts of strategic alignment, project portfolio management, and organizational transformation within a real organization, with its own strengths, constraints, and challenges.

5.1. Presentation of the NGO

Community Action Developer Canada Friendship Gatineau is a non-profit organization based in Ontario, specializing in international cooperation. It organizes short-term introductory international cooperation projects for youth and adults, combining volunteer activities and cultural exchanges.

Its mission is to raise awareness among participants about the realities of local communities and to promote international solidarity through concrete actions. The organization relies primarily on volunteers, partnerships, and fundraising activities to carry out its projects. Working through short-term projects allows for a degree of flexibility and rapid adaptation. However, this approach can also complicate long-term strategic planning, particularly regarding the alignment between completed projects and the organization's overall direction.

5.2. Analysis of The Current Situation

Currently, Community Action Developer Canada's activities are based on the implementation of several international projects, often developed according to opportunities, partnerships, and available resources. This approach offers a certain degree of flexibility, but it limits the formalization of management processes. Decision-making appears to be driven more by immediate needs and ad hoc initiatives than by structured strategic planning. In this context, the absence of a formal project portfolio management system can lead to a lack of overall visibility across all ongoing projects.

This situation can make it more difficult to align the strategic direction of projects with the organization's objectives. Indeed, without a structured selection and prioritization mechanism, projects can be developed independently, which limits the overall coherence of actions. Furthermore, the strong focus on human experience and participant engagement, while essential, can sometimes take precedence over a logic of organizational performance and strategic planning.

5.3. Identified Problems

From this analysis, several problems can be identified. First, a lack of strategic alignment between projects and the organization's overall objectives can be observed. Without structured project portfolio management, some initiatives may be selected based on opportunities rather than their actual contribution to the organizational strategy. Furthermore, limited resources, both human and financial, exacerbate the difficulty of effectively prioritizing projects. This can lead to a dispersion of efforts and an overload of teams, thus reducing the overall efficiency of the organization.

Furthermore, the lack of formalized monitoring and coordination tools limits the organization's ability to assess project performance and adjust its actions based on results. This absence of structured monitoring can hinder organizational learning and continuous improvement. Finally, these various elements can hinder the organizational transformation of the NGO, by limiting its ability to adapt strategically to changes and needs on the ground.

These findings highlight the need to implement a more structured project portfolio management system in order to strengthen strategic alignment and improve organizational performance.

6. Discussion

This section focuses on the most significant findings of the systematic review of previous studies, linking them to our research question to better highlight the limitations and gaps observed in the current literature and its inability to adequately answer our research question. We then discuss best practices and recommendations for addressing the various problems identified in the context of improving strategic alignment within NGOs.

6.1. Summary of Contributions to Understanding Organizational Transformation

Taken together, these articles enrich the understanding of organizational transformation in three ways.

First, they show that organizational transformation is not solely based on launching new projects, but on systemic coherence between strategy, resources, governance, decisions, and learning. In other words, organizational transformation is not a sum of initiatives; it results from a capacity for continuous alignment. This idea is strongly emphasized by Carreño (2024) [4], but it is also present in Lacerda *et al.* (2016) [13] and Kopmann *et al.* (2017) [12].

Second, the texts show that transformation requires a dual movement of stability and adaptation. The organization must maintain a clear strategic direction while integrating changes in context. Kopmann *et al.* (2017) [12] make a major contribution here by showing that emergent strategies are not opposed to alignment; on the contrary, they can be an essential component when recognized and framed by

appropriate strategic control. Azevedo *et al*. (2024) [2] extend this idea in the context of NGOs by combining alignment and agility in times of crisis.

Third, this research suggests that organizational transformation in NGOs depends on multidimensional alignment. Ghonim *et al*. (2020) show that effective decision-making stems from a simultaneous alignment between IT, operations, individuals, and clients. This idea is particularly relevant for NGOs, as it underscores that the social mission can only be sustained if internal human and technological systems are coherent. Thus, the central contribution of this collection of texts is to elevate strategic alignment from a simple management principle to an explanatory mechanism for organizational transformation.

6.2. Conditions for The Success of Strategic Alignment in NGOs

In light of these five texts, several conditions for success emerge for NGOs. The first condition is the clarification of their mission, vision, and strategic priorities. Without explicit direction, projects risk being juxtaposed rather than integrated. Lacerda *et al*. (2016) [13] clearly demonstrate that strategy must precede portfolio structuring. Similarly, Carreño (2024) [4] emphasizes the congruence of objectives as the foundation for any coherent transformation.

The second condition is the existence of a process for prioritizing and allocating resources. In NGOs, where financial, human, and material resources are often limited, strategic alignment requires explicit choices between competing projects. Lacerda *et al*. (2016) [13] emphasize the importance of selection, prioritization, portfolio control, and fundraising in this regard. Carreño (2024) [4] adds that the strategic allocation of resources directly determines the effectiveness and sustainability of transformations.

The third condition is participatory governance and genuine stakeholder involvement. In NGOs, alignment cannot be imposed solely from the top, as legitimacy often depends on members, volunteers, donors, partners, and beneficiaries. Carreño (2024) [4] shows that stakeholder engagement supports continuous adjustments. Azevedo *et al*. (2024) [2] also emphasize the importance of technological governance and a shared understanding of digital tools.

The fourth condition is the capacity for learning and adaptation. In an unstable environment, NGOs must remain true to their mission while maintaining a degree of flexibility. Kopmann *et al*. (2017) [12] demonstrate precisely that strategic success results from a balance between deliberate strategy and the recognition of emerging strategies. This idea is particularly relevant for NGOs, which often face evolving social needs, crises, or changing donor requirements.

Finally, a last important condition is transparency and accountability. Lacerda *et al*. (2016) [13] show that in the non-profit sector, the legitimacy of the portfolio also depends on the ability to account for results, resources mobilized, and agreements made with funders.

6.3. Best Practices to Implement for Improving Strategic Alignment in The Case of NGOs

6.3.1. Establish A Structured Framework for Project Portfolio Management

The first recommendation drawn from the literature is the adoption of a formal project management framework, even in a streamlined form proportionate to the size of the organization. This does not mean creating a bloated Project Management Office (PMO), but rather clearly defining the stages of a project's lifecycle within the organization:

1. ideation and opportunity capture,
2. strategic prequalification, i.e., determining whether the project aligns with the strategy,
3. detailed evaluation (risks, costs, benefits, resources),
4. selection decision by the steering committee,
5. execution with control milestones, and
6. closure and capitalization of lessons learned.

Lacerda *et al*. (2016) [13] suggest adapting this framework to the specific characteristics of NGOs by including eligibility criteria linked to the ethical charter and social mission from the ideation phase. This avoids wasting time and energy on proposals incompatible with the organization's founding values. For SMEs, this framework provides the necessary structure to ensure that strategic decisions are no longer solely the responsibility of a single individual, but rather the result of collective and documented reflection, thus reducing the risks associated with excessive centralized decision-making.

6.3.2. Ensure Alignment Between Organizational Strategy and Project Selection

The second key principle from the literature is that project selection can never be based on a "first come, first served" basis or as a reactive response to external pressures. It must be the result of a rigorous evaluation based on weighted and measurable selection criteria, explicitly derived from the organization's strategic priorities. Meskendahl (2010) [17] emphasizes the need to derive these criteria from the organization's vision rather than borrowing them from generic industry standards.

For example, an NGO whose strategy is based on three pillars (direct impact, programmatic innovation, and sustainable partnerships) could weight its selection criteria as follows: 40% measurable impact on beneficiaries, 25% potential for innovation and knowledge sharing, 20% financial viability and operational feasibility, and 15% contribution to strategic partnerships. Any project that does not meet a minimum threshold of overall alignment must be rejected or reformulated before being resubmitted to the steering committee. Ghonim *et al*. (2022) [9] confirm that this objectification of criteria significantly reduces decision-making conflicts and strengthens the legitimacy of the choices in the eyes of all stakeholders.

6.3.3. Developing Effective Strategic Governance

The third fundamental practice is the clear separation between strategic portfolio governance and the operational management of individual projects. Portfolio governance is responsible for ensuring alignment with the overall strategy, while operational management focuses on efficient execution. Confusion between these two levels is common in SMEs and NGOs and is a major source of inefficiency and loss of strategic value.

The authors recommend regular portfolio reviews—at least quarterly—involving senior management. This committee must have the explicit authority to stop projects that are no longer aligned or that consume resources disproportionately (the " kill switch" power), thereby freeing up resources for more promising initiatives (Carreño, 2024) [4]. Governance must also include mechanisms for managing resource conflicts: when two competing projects demand the same

limited resources, clear and pre-established arbitration rules must allow for an objective decision, without leaving the matter to informal negotiations or internal power struggles.

6.3.4. Fostering Organizational Agility and Strategic Learning

The fourth practice is based on the conviction that a project portfolio is not a fixed plan, but a dynamic system that must learn and adapt. As Azevedo *et al*. (2024) [2] emphasize, using the case of NGOs during a health crisis, agility is not an option but a critical organizational skill. SMEs and NGOs must implement short feedback loops between project execution and strategic portfolio reflection. In concrete terms, this means integrating formal "strategic retrospective" phases into portfolio reviews: Which projects generated unexpected learnings? Which emerging opportunities discovered during execution deserve to be integrated into the portfolio? Kopmann *et al*. (2017) [12] show that the highest-performing organizations are those that feed their deliberate strategy with the learnings from emerging strategies, thus creating a true learning organization. This culture must also make room for the right to make mistakes: if a pilot project does not produce the expected results, the organization must be able to pivot quickly without institutional shame or paralyzing resistance to change.

6.3.5. Use Decision Support and Strategic Monitoring Tools

The fifth practice concerns decision-making tools. The literature is unanimous: intuition alone cannot suffice as a decision-making basis for managing a portfolio of projects, especially in a context of severe constraints and accountability requirements. Two categories of tools are particularly recommended. On the one hand, multi-criteria analysis (MCDA) tools – including AHP (Analytic) methods Hierarchy Process (HIP) and TOPSIS (Technique for Order of Preference by Similarity to Ideal Solution) streamline complex choices by structuring the comparison of multiple projects based on weighted criteria. These tools significantly reduce cognitive and political biases in decision-making (Barbati *et al*., 2023) [3]. They are accessible as structured Excel spreadsheets and do not require expensive specialized software.

Balanced Scorecard Scorecard, introduced by Kaplan and Norton, allows organizations to track strategic alignment along four complementary axes: financial (or budgetary for NGOs), client/beneficiary, internal processes, and organizational learning and growth. This tool translates high-level strategic vision into measurable operational indicators, thus creating the bridge that organizations seek between intention and action (Oudeh *et al*., 2023) [18]. Accessible tools such as Microsoft Power BI or well-structured Excel dashboards can fulfill this function in SMEs and NGOs with limited resources.

7. Proposal of Solutions Applicable to The Problems Identified in The Case of The Ngo Community Action Developer Canada

7.1. Implications for NGOs

For NGOs, the implications are significant. On the one hand, this research encourages NGOs to professionalize their management without losing their missionary focus. It is not a matter of mechanically importing tools from the private sector, but of adapting them to the demands of the non-profit sector: social mission, multiplicity of stakeholders, financial dependence, accountability, and resource constraints. In this regard, the model by Lacerda *et al*. (2016) [13] is particularly useful, as it adds fundraising and accountability to the traditional portfolio dimensions. On the other hand, NGOs would benefit from developing formal yet flexible mechanisms for selecting, prioritizing, monitoring, and reviewing their projects. Such a structure would allow for a better balance between social urgency, donor constraints, and a long-term vision. The work of Kopmann *et al*. (2017) [12] further suggests that these mechanisms must allow room for emergence, learning from experience, and weak signals.

Furthermore, NGOs should invest more in information and technology governance. Azevedo *et al*. (2024) [2] show that IT alignment can increase agility, and therefore the capacity to respond in times of crisis. For NGOs, this means that digital tools should not be considered peripheral supports, but strategic resources serving the mission. Finally, NGOs must recognize that strategic alignment is also a human and cultural issue. It requires inspiring leadership, cross-functional communication, team buy-in, and ongoing dialogue with stakeholders. Without this relational dimension, even the best portfolio or program tools risk remaining formal and offering little transformative impact.

7.2. Establishment of A Project Portfolio Management Steering Committee

To address the lack of structure and prioritization difficulties identified previously, it is recommended to establish a steering committee dedicated to project portfolio management within Community Action Developer Canada. This committee could be composed of key project managers and meet regularly, for example once a month, to assess, select and prioritize projects based on the organization's strategic objectives and available resources.

It would also be relevant to integrate management tools, such as a project prioritization grid and a monitoring dashboard, allowing for an overall view of ongoing initiatives and facilitating decision-making. Establishing this committee would prevent project selection based solely on opportunities and foster a more coherent and strategic approach. It would thus help strengthen the alignment between projects and the organization's mission, while improving the coordination of actions.

However, this structure must remain adapted to the size and limited resources of the NGO so as not to burden the decision-making processes.

7.3. Improve Internal Strategic Communication

To address the lack of coordination and consistency between projects, it is recommended to improve internal strategic communication within Community Action Developer Canada. This could involve setting up regular meetings between teams, as well as using shared communication and monitoring tools, such as collaborative platforms or standardized project reports.

Improved information flow would allow stakeholders to better understand the organization's strategic priorities and align their actions accordingly. This would also foster better coordination between projects and reduce the risk of duplication or fragmentation of efforts.

In a context where projects are often carried out autonomously, more structured communication is an essential lever for strengthening organizational coherence

and improving overall performance. However, these mechanisms must remain simple and appropriate so as not to create an administrative burden for the teams.

7.4. Evaluations Through Periodic Progress Reports

7.4.1. Periodic Progress Reports

Each project manager must produce a standardized monthly report ("Flash Report") that fits on one page. This intentionally short format promotes discipline and regularity. It must include:

- **The summary progress status:** Percentage of actual progress versus planned progress and milestones achieved or missed.
- **Active major risks:** The 2-3 main ongoing risks with corresponding mitigation plans.
- **Project weather:** A simple color code: Green (in line with plans), Orange (attention required), Red (urgent corrective action needed).
- **Earned value indicators:** The Schedule Performance Index (SPI), which measures the efficiency of using planned time, and the Cost Performance Index (CPI), which measures the efficiency of using the allocated budget. These indicators should be introduced gradually, starting with the projects of highest strategic importance.

7.4.2. Strategic Dashboards

At the consolidated portfolio level, we recommend using a strategic visual dashboard, accessible to all Steering Committee members, developed using accessible tools such as Microsoft Power BI or even Excel. This dashboard should aggregate and visualize:

- Overall budget consumption in relation to allocated funds, broken down by strategic axis.
- The allocation of human and financial resources by strategic axis, to visualize whether the actual investments correspond to the declared priorities (the true test of alignment!).
- The overall risk level of the portfolio and projects in the alert zone.
- The strategic alignment rate of the portfolio: what percentage of resources are invested in projects with high strategic priority? This summary indicator is the most accurate reflection of the organization's strategic health.

7.5. Strengthening strategic project management skills in NGOs

Our fourth and final recommendation is perhaps the most fundamental: the most sophisticated tools are worthless without the skills and culture needed to use them intelligently. Strategic alignment is first and foremost a matter of men and women capable of thinking systemically, making decisions in situations of uncertainty, and resisting the pressures of operational urgency to maintain the strategic course.

We recommend a progressive skills development plan tailored to the constraints of SMEs and NGOs:

- **In the short term:** Internal practical workshops of 2-3 hours led by experienced members or occasional consultants, on the fundamentals of GPP: identification of stakeholders, creation of a project charter, basic risk management and simple prioritization techniques.
- **In the medium term:** Internal or external mentoring between experienced and more novice managers, promoting an organic transfer of skills adapted to the specific context of the organization.
- **Long term:** For organizations whose maturity in GPP is developing, support for strategically chosen certification training for key profiles in the portfolio (PMI-RMP for risk management, PMI-ACP for agility).

The ultimate goal is to create a "common language of strategic management" within the organization, where all actors – from management to execution – share the same references, the same concepts and the same conviction that strategic alignment is a collective responsibility and a driver of sustainable transformation.

8. Conclusion

In conclusion, this work highlights that strategic alignment is a key driver of organizational transformation in NGOs, as it fosters greater coherence between the social mission, institutional priorities, and the projects included in the portfolio. Project portfolio management thus emerges as an essential governance tool, enabling improved resource allocation, decision-making quality, and the organization's ability to adapt to the demands of its environment.

Like all research, our study has certain limitations. The limited number of articles analyzed reduces the scope of the corpus used, while several of the selected references rely on specific contexts or frameworks initially developed for for-profit organizations, which calls for caution in their application to the realities of NGOs. Furthermore, certain dimensions, particularly the human, political, and cultural aspects of organizational transformation, could have been explored in greater depth. These points do not detract from the relevance of the work, but rather highlight the complexity of the subject matter.

From this perspective, future research could broaden the body of scientific work, incorporate longitudinal studies conducted in NGOs from diverse contexts, and delve deeper into the concrete mechanisms by which strategic alignment is built and evolves over time. It would also be relevant to examine in greater detail the role of participatory governance, organizational agility, and digital tools in managing project portfolios. Thus, our work provides a solid foundation for reflection and opens up interesting avenues for future research.

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