Urgency for Change
Organisational responses to shifting funding and political landscapes

June 2025

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Survey
Results

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Key findings &
Potential Solutions

Financial issues came across as a primary concern, with 69% of respondents placing it as their number one concern and 17% placing it as their second. This was also reflected in organisational responses, where 83% of respondents are reviewing their funding or resource mobilisation strategy and/or conducting donor mapping to address current challenges. They also mention diversifying funding sources.

Resource Mobilisation strategies provide a comprehensive plan to diversify funding sources and enhance donor engagement

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It is clear that organisations are aware of and attempting to respond effectively to growing instability across the global development sector. This is reflected by **organisational improvements and redesign** as well as comments that mention USAID/US government cuts and discuss the need to reprioritise to respond to the evolving landscape and demand for increased efficiency.

Organisational Improvement and Redesign optimise organisational effectiveness and resilience

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Survey respondents appear to be pessimistic about immediate circumstances but believe things will improve in the coming years. They also indicate they have high **organisational readiness** for change, but with constraints around time and organisational bandwidth.

Mergers and Alliances pool bandwidth and combine skills and comparative advantages

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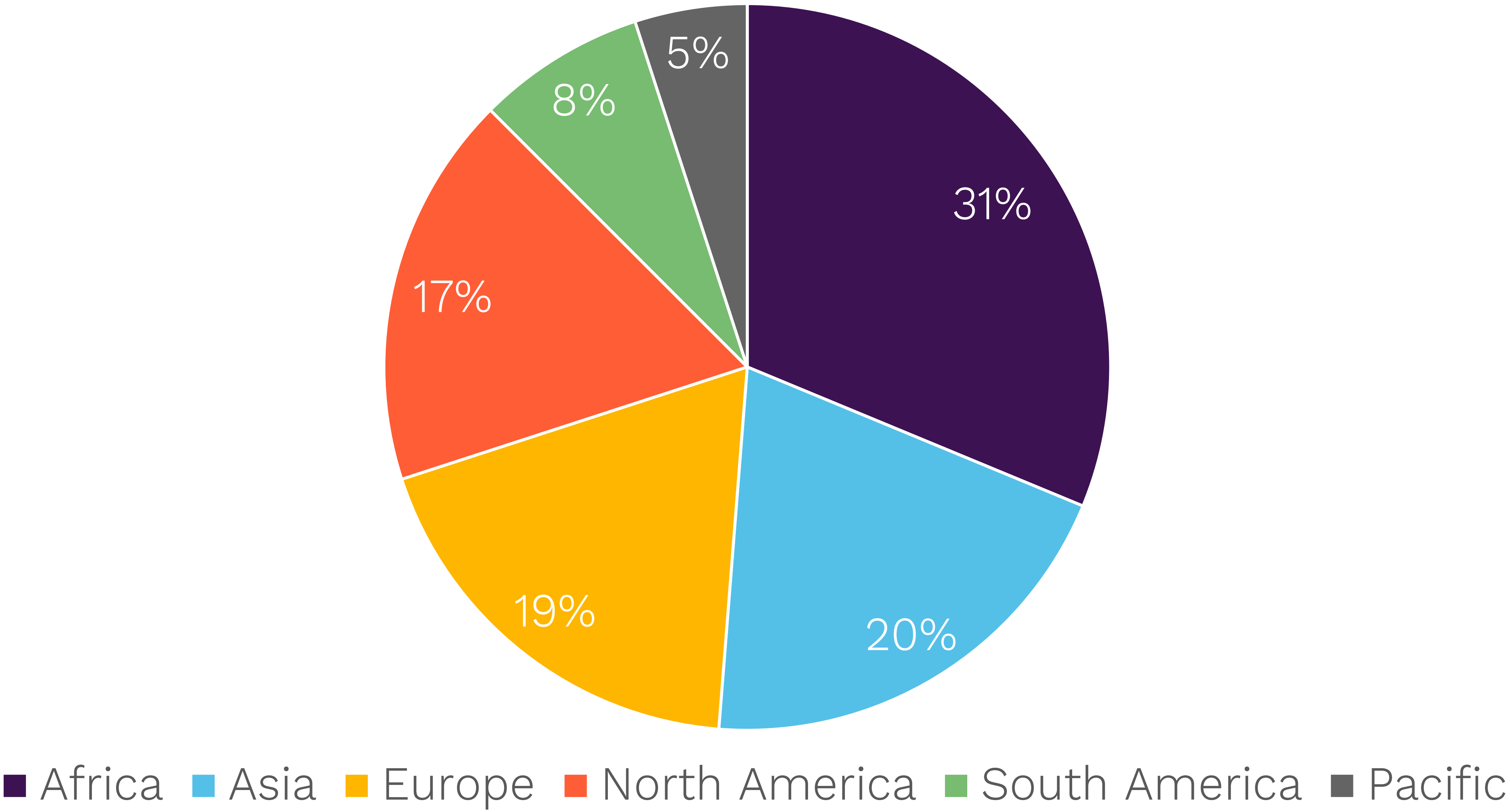
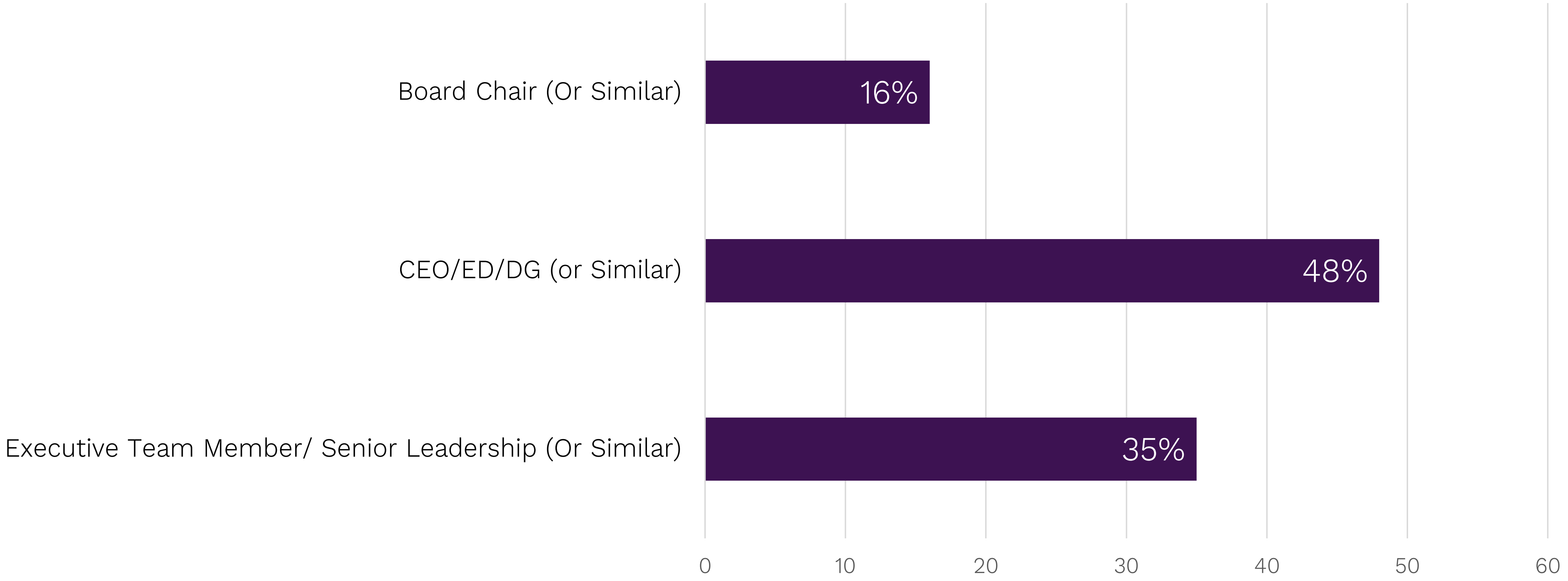
Respondent Location Breakdown



Respondent Role Breakdown in Percentages

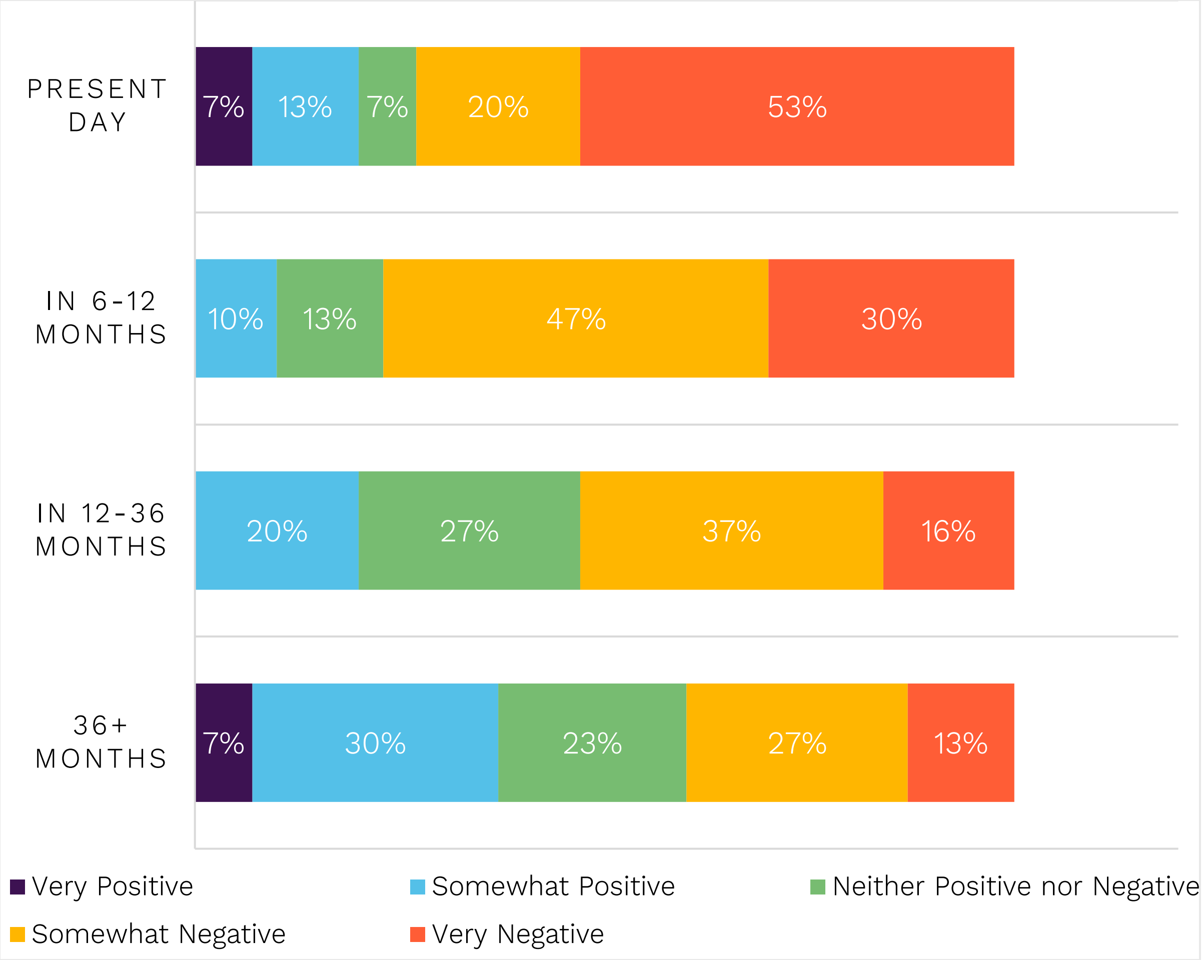


How would you rate the overall market sentiment for your sector over the time frames listed below?

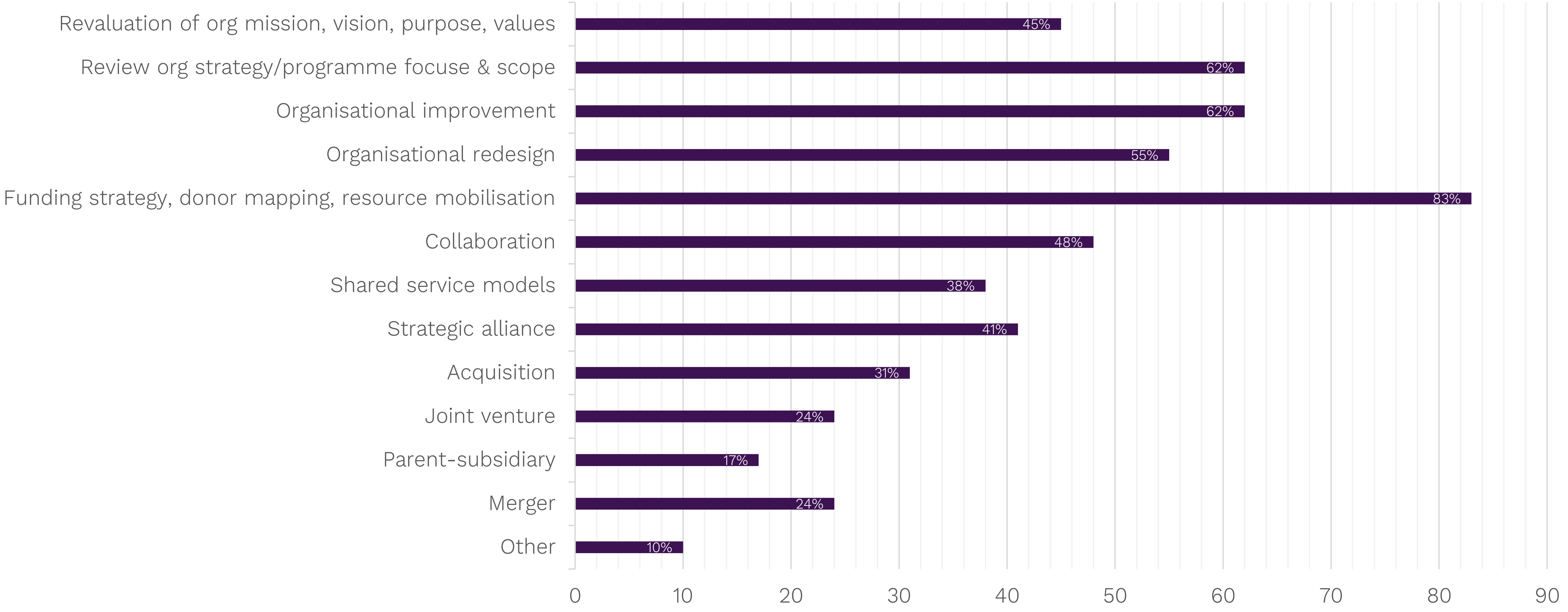
At present, based on our respondents' insights and experience, their market sentiment is heavily weighted towards very negative and negative. This is unlikely to improve in the next 6-12 months. However, there is confidence that things will stabilise and improve in the next three years, with sentiment moving towards somewhat positive, or at least neutral.

When interpreting these results, it is essential to remember that respondents typically have over 20 years of experience, so they have weathered previous downturns. Furthermore, board members typically sit across more than one organisation, including the private sector, so they benefit from a more holistic view of the market.

Whilst the focus for many organisations is survival, as market conditions improve leaders who have successfully navigated current challenges will be well-positioned to grow their impact: leveraging their diversified resources, optimised organisational effectiveness and resilience, and – potentially – new alliances.



How is your organisation addressing its challenges?



Organisation

Responses

Organisations are not sitting idle. Since financial concerns are the primary issue for most respondents, the most common organisational response is reviewing funding or resource mobilisation strategy and/or conducting donor mapping and diversifying funding sources.

However, many organisations are going further to review their organisational strategy and/or programme focus and scope. This reflects the magnitude of the current situation for some organisations, which have found that business as usual is no longer tenable – this includes pivoting from global to domestic development work for some organisations based in the Global North.

Over half of respondents are making organisational improvements (like adapting ways of working, reviewing systems, and reviewing culture) and/or redesigning their organisations further, with structure, workforce, and operating model. Comments show these changes focus on reprioritising, responding to the evolving landscape and increasing efficiency.

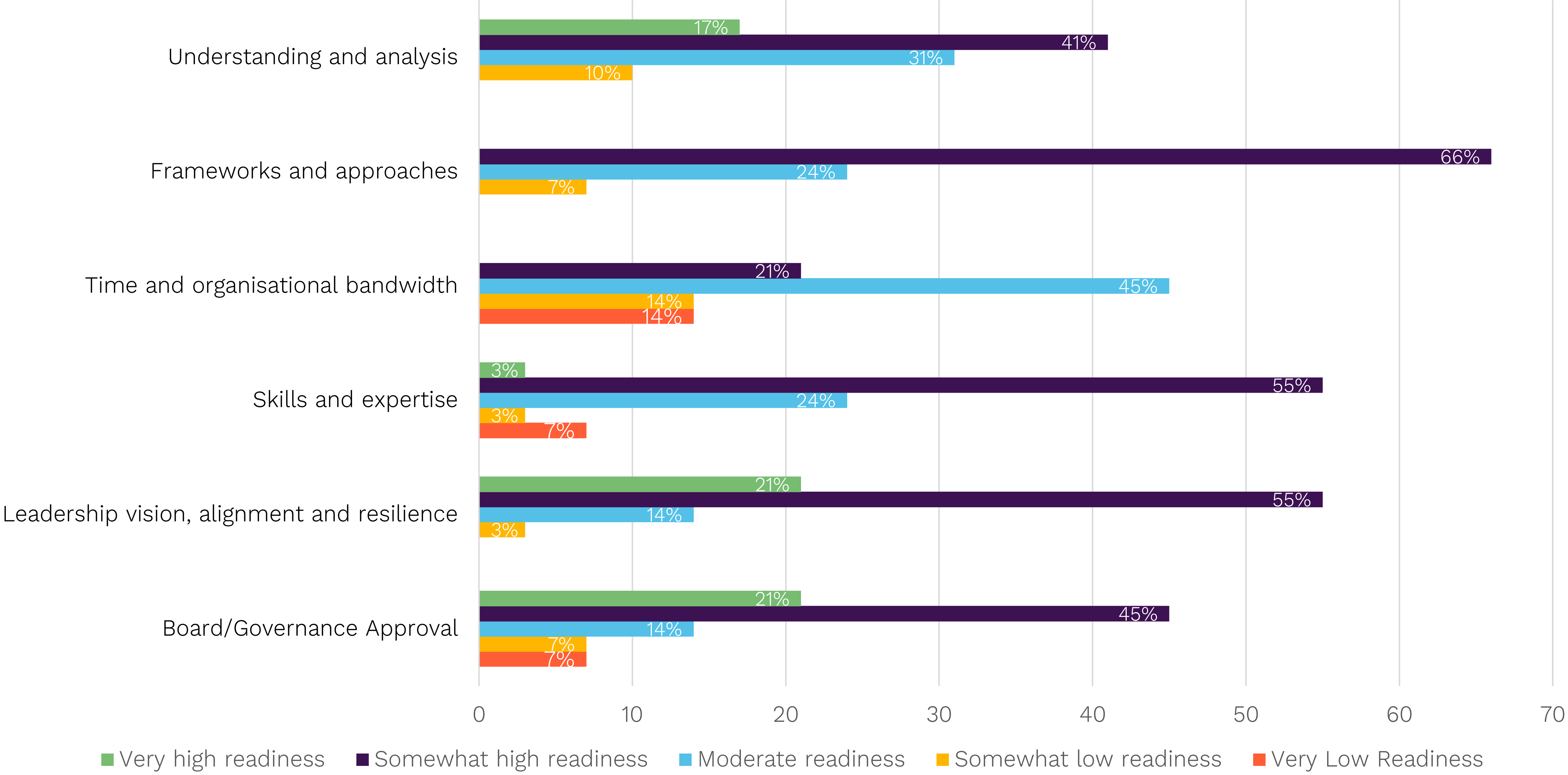
Few specific actions have been taken in mergers and alliances. However, comments suggest an openness to different forms of partnership and collaboration, such as alliances, joint ventures or shared services, to cope with recent upheavals.

Organisational
Readiness

Most respondents rated their readiness across the different categories as high to moderate, suggesting that most have a basic level of confidence in their ability to face present and upcoming challenges. The areas with the lowest confidence levels are time and organisational bandwidth.

This suggests that, while some of the understanding, skills, leadership, and governance are available, time and bandwidth constraints might hinder effective responses. This corresponds with insights from leaders, who know what they want to do, but often lack the capacity in their team to implement.

Organisational
Readiness



Conclusion

Global development organisations face unprecedented financial pressures, compounding existing challenges of relevance, efficiency, and a declining public perception of aid effectiveness. It is therefore unsurprising that current market sentiment is negative and expected to remain so for the next 12 months. However, optimistically, respondents feel the situation will improve in three years, in line with the US election cycle.

Our survey shows strong recognition of the challenges faced and a readiness to respond with the right understanding, approaches, skills, leadership, and governance. Already, organisations are responding by refreshing their funding and resource mobilisation strategies to diversify their funding sources and make organisational improvements. However, given the magnitude of the challenge, many are going further to reevaluate their organisational strategy and/or programme focus and scope, and look to redesign their organisation and/or operating model. Some expect their organisation to look fundamentally different in the future.

With change happening so fast and many people's friends, families and communities affected, time and organisational bandwidth are constraints. Furthermore, as yet, and despite signals from donors that they would like to see consolidation, few organisations are considering mergers and alliances to cope with recent upheavals. However, comments suggest an openness to different forms of partnership and collaboration, such as alliances, joint ventures or shared services, to cope with recent upheavals.

Thank you!

We look forward to discussing your situation further. Please get in touch.

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