Guide to the Strategic Planning Process

Nonprofit Alliance OF BERMUDA

Ready to get started with NAB on your next **Strategic Plan?**

A strong strategic plan doesn't happen in a single meeting — it's built through thoughtful preparation, meaningful stakeholder input, and clear decisions about the future. This handout is your roadmap.

It outlines:

- The phases of NAB's strategic planning process
- The key deliverables you can expect from us
- The responsibilities and inputs we'll need from your organisation
- How leadership and governance will be engaged throughout the process

Our goal is to help you produce a plan that is:

✅ Clear and focused
✅ Grounded in real needs and opportunities
✅ Owned by your Board and leadership
✅ Ready to implement with confidence

Please review this handout to see what's coming — and what success looks like.

Strategic Planning Process Overview

The Nonprofit Alliance of Bermuda's (NAB) conventional strategic planning is designed to build shared direction, incorporate stakeholder input, and produce a practical plan that can be implemented immediately.

Typical Timeline: 4 months (may vary based on size, availability, and scope).

PHASE 1: PROCESS DESIGN & PLANNING

Goal: Ensure the organisation is ready for strategic planning and the process is clearly structured.

Key Activities
- Conduct a Strategic Planning Intake Survey
- Form a Planning Committee
- Define planning scope, timeline, decision points, and meeting schedule
- Align expectations for participation, engagement, and approvals

Outputs
- Confirmed workplan and timeline
- Planning Committee established
- Readiness findings and planning recommendations
- Signed contract

PHASE 2 (PART 1): SITUATIONAL ANALYSIS — ASSESSMENT & ARCHIVAL REVIEW

Goal: Develop a data-informed picture of the organisation's current state and strategic context.

Key Activities
- Organisational assessment (Board & staff)
- Consultant review of key documents and materials (e.g., reports, financials, program data)
- Summary reporting on strengths, gaps, opportunities, and risks
- Early recommendations to inform strategic direction

PHASE 2 (PART 2): SITUATIONAL ANALYSIS — STAKEHOLDER CONSULTATION

Goal: Ensure the strategy is grounded in the needs and perspectives of the people and communities the organisation serves.

Key Activities
- Develop stakeholder consultation plan (clients/beneficiaries, donors, partners, community stakeholders)
- Conduct consultation activities (surveys, interviews, and/or focus groups)
- Analyse stakeholder feedback and identify key themes
- Summary reporting on findings

PHASE 3: STRATEGY RETREAT

Goal: Facilitate strategic decision-making and confirm organisational direction.

Key Activities
- Review findings from situational analysis and stakeholder consultation
- Review and refine mission, vision, problem statement, and values
- Use decision-making tools to determine key strategic priorities and goals
- Summary reporting of retreat data into strategy format

Strategic Planning Process Overview

PHASE 4: THEORY OF CHANGE

Goal: Strengthen clarity on how the organisation will achieve its mission, outcomes, and impact and solve problem identified

Key Activities

- Review/refine problem statement, outcomes, impact pathways, indicators
- Confirm strategies and assumptions
- Align activities and programs to outcomes and mission

PHASE 5: ACTION PLAN & KPI DEVELOPMENT

Goal: Translate strategy into a realistic Year 1 roadmap and confirm how success will be measured in a monitoring dashboard.

Key Activities

- Develop Year 1 action plan for each strategic goal and theory of change strategies
- Confirm Key Performance Indicators (KPIs) aligned to the strategic plan
- Define the structure of a monitoring dashboard and reporting rhythm

PHASE 6: FINAL REPORT & CLOSE OUT

Goal: Finalise the strategic plan and establish an ongoing approach to monitoring progress.

Key Activities

- Draft, review, refine, and finalise the strategic plan document
- Support Board approval process
- Provide communication guidance for sharing the plan with stakeholders

WHAT SUCCESS LOOKS LIKE

By the end of this process, the Client Organisation will have:

- **A strategic plan grounded in internal assessment and stakeholder consultation**
- **Clear priorities, goals, and outcomes aligned to mission**
- **A refined Theory of Change (where needed)**
- **A Year 1 action plan to support implementation**
- **A monitoring dashboard with KPI framework to track progress and adapt over time**

NAB Deliverables for the Client Organisation

Throughout NAB's multi-phased approach to conventional strategic planning, you can expect the following deliverables from NAB:

01 PROCESS DESIGN & PROJECT MANAGEMENT

- Customised workplan, timeline, and milestone schedule
- Defined roles, participation expectations, and decision points
- Ongoing coordination and process oversight to keep the engagement on track

02 ORGANISATIONAL ASSESSMENT & SYNTHESIS

- Board/leadership assessment tools (survey and/or structured input)
- Review of organisational documents provided by the Client
- Synthesis of findings into a current-state summary (strengths, gaps, risks, opportunities) including expert recommendations

03 STAKEHOLDER ENGAGEMENT

- Stakeholder engagement plan and consultation approach guidance
- Stakeholder survey and/or focus group/interview guide creation guidance
- Synthesis of input into key themes and implications

04 STRATEGIC FACILITATION & RETREAT

- Facilitation of planning meetings with leadership/Board (as scheduled)
- Design and facilitation of the strategic planning retreat
- Decision-making tools, structured exercises, and documentation of discussion

05 STRATEGIC FRAMEWORK & PLAN DEVELOPMENT

- Draft strategic framework, including:
  - Strategic priorities and goals
  - Measures of success (KPIs)
- Draft strategic plan, revisions, and finalisation based on Client feedback
- Board-ready summaries and decision documents (as needed)

06 IMPLEMENTATION READINESS

- Guidance and/or tools to develop a Year 1 implementation plan, including:
  - Initiatives, timelines, ownership, and resourcing considerations
- Support for Board approval and delivery of final planning outputs

EXPECTATIONS OF THE CLIENT BOARD OF DIRECTORS

The Board provides strategic direction, governance leadership, and final approval of the strategic plan. Board members are expected to:

- Complete a Board assessment (or survey) by the stated deadline.
- Participate in strategy discussion sessions (typically 2 virtual meetings).
- Attend and actively engage in the strategic planning retreat (full day or two half-days).
- Review and interpret assessment and stakeholder engagement findings.
- Make strategic choices about priorities and trade-offs.
- Approve final strategic plan, Theory of Change, monitoring dashboard and Year 1 implementation plan

EXPECTATIONS OF THE CLIENT PLANNING COMMITTEE

The Planning Committee supports the process by guiding engagement, conducting stakeholder outreach, and maintaining momentum. Committee members are expected to:

- Attend all Board-required sessions
- Attend additional 2-3 virtual planning meetings at key stages of the process.
- Act as champions for the process within the organisation.
- Support stakeholder identification and outreach.
- Conduct and record focus groups and interviews
- Support alignment and communications during the planning process.

EXPECTATIONS OF THE CLIENT EXECUTIVE DIRECTOR

The Executive Director is the process sponsor and primary point of coordination for the organisation. The ED is expected to:

- Act as the primary liaison between NAB and the Client Organisation.
- Attend all Board and Planning Committee meetings
- Coordinate logistics and ensure participant engagement.
- Ensure timely access to organisational information.
- Support staff participation and completion of assessment tools.
- Maintain communication with the Board Chair and Planning Committee lead.
- Ensure internal participation and coordination across staff and Board.
- Work with NAB to complete the Theory of Change assignments
- Lead the development (or refinement) of the Year 1 implementation plan after strategic priorities are confirmed.

Get In Touch

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