



# Reimagining the BDA Third Sector

## “In-depth Interview Report”

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## INTRODUCTION

*“The dual-pandemic of COVID-19 and heightened awareness of systemic racism has forced third sectors worldwide to address unprecedented challenges and operate in brand new ways. This global moment has raised an opportunity for the BDA Third Sector to transform how it approaches its purpose.*

*The Reimagining the BDA Third Sector initiative was launched as a venue to act on this opportunity. It is an opening to build on the sector’s history of self-improvement and to “reimagine” what it looks like in the future” (Dholakia, 2020).*

Toward this effort, the Reimagining the BDA Third Sector initiative aims to explore whether the BDA Third sector (including Nonprofit organisations, Philanthropy and Government) (refer to figure 1) can benefit from a collection of third sector tools and strengthening approaches that completely aligned with its needs and purpose.

**The BDA Third Sector’s Purpose:** To ensure equitable opportunity, lifelong success, and quality of life for all Bermuda residents.

### Who the BDA Third Sector Is:

Nonprofit Organizations	Philanthropy	Government
<ul style="list-style-type: none"> <li>• Direct service providers</li> <li>• Advocacy groups</li> <li>• Intermediaries: Network facilitators, TA providers, evaluators, researchers, etc.</li> <li>• Civil society organizations including faith-based institutions, clubs, etc</li> </ul>	<ul style="list-style-type: none"> <li>• Foundations (corporate, private, family, community)</li> <li>• Individual donors</li> </ul>	<ul style="list-style-type: none"> <li>• BDA government agencies</li> <li>• Policymakers</li> <li>• Elected officials,</li> <li>• Public/civil servants</li> </ul>

*Figure 1.* The project definition for the BDA Third sector purpose, and the BDA Third Sector stakeholder groups (Dholakia, 2020).

Phase one of the initiative included exploratory research designed to generate ideas and hypotheses. The project leaders (Anand Dholakia and Dr. Leslie Steede) kicked off the research by completing a secondary research report that includes a review of all relevant background research on third sector strengthening approaches and trends worldwide (Dholakia, 2020).

Here, we conducted qualitative interviews with a cross-section of third sector stakeholders to obtain their opinions of the third sector strengthening approaches and trends presented in the secondary research report, and to determine whether stakeholders believed these tools and strengthening approaches could be beneficial to the BDA Third Sector. The research also probed stakeholders on their opinions of what a collective vision for the BDA Third Sector could be, on other resources and tools that might be helpful to the BDA Third Sector, and on how a reimagined third sector model could be implemented.

The intelligence gained from the secondary research and the qualitative interviews will be used to drive the final phase of the research, a quantitative survey conducted with a representative sample of the BDA Third Sector. The quantitative survey will provide

statistically valid data to determine the feasibility of creating a transformative third sector model encompassing tools and strengthening approaches that completely align with the current needs and purpose of the BDA Third Sector.

## METHODOLOGY

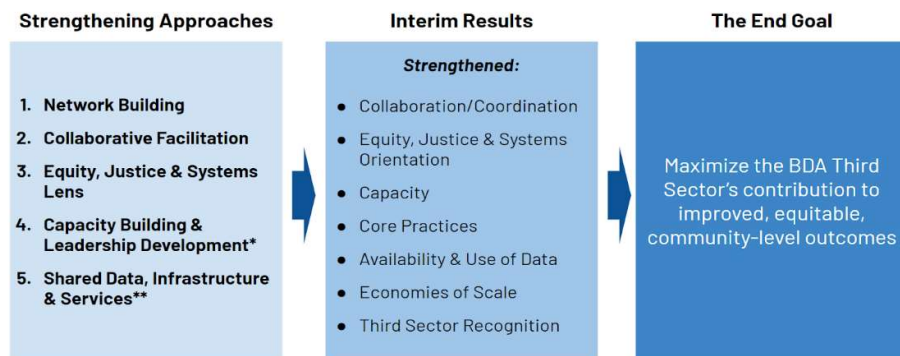
Global Research interviewed a total of 26 BDA Third Sector stakeholders as follows:

- 6 government officials
- 6 non-profit organisations (direct service providers)
- 5 foundations/donors
- 5 quangos
- 4 private consultants

Each interview was approximately 1 hour in length.

The qualitative interviews aimed to address the following issues:

- What a collective vision for the BDA Third Sector could look like,
- Whether strengthening approaches or trends that had been identified as useful for other third sectors (Dholakia, 2020) could be useful for the BDA Third Sector. In particular, the research probed opinions on strengthening approaches related to network building, collaborative facilitation, capacity building/leadership development, sharing data, infrastructure & services, and operating with more of an Equity, Justice and Systems Lens (refer to figure 2).
- Whether other resources such as tools for better understanding the needs of the community could be useful to the BDA Third Sector.
- Appropriate leadership for implementing any reimagined Third Sector Model.



*Figure 2.* The 5 strengthening approaches that were discussed as a part of the interviews (first box) and the results that these approaches can potentially achieve (adapted from Dholakia, 2020).

### OVERVIEW

A diverse group of respondents with a wide range of experience in the third sector offered insight into what they thought could be the appropriate vision, leadership, strengthening approaches and tools for an effective reimagined third sector for Bermuda. All respondents were engaged by the interview process and were committed to improving the lives of the people of Bermuda.

The most popular elements of a collective vision for the BDA Third Sector were collaboration and communication and working in alignment to identify and address the greatest needs in the community.

Respondents saw value in most of the strengthening approaches and tools that were described to them.

The key findings of the research were as follows:

- All respondents believed that understanding the needs of Bermuda's community was very important to the success of the BDA Third Sector (all respondents rated it a 10 out of 10 for importance).
- The vast majority believed that an equity and social justice approach was very important for understanding the needs of the community (the average rating for importance was 9.7 / 10). They believed that it would be important to "level the playing field" when providing services and funding to ensure that resources were being allocated to the greatest needs.
- Just over 7 in 10 (73%) supported network building initiatives (i.e., third sector networking organisations) and believed that they could help facilitate collaboration, data collection and sharing, training and advocacy.
- Third sector respondents also saw value in sharing resources (i.e., data, infrastructure, and services). Managed administrative services were perceived as the most useful shared resource (Achieved a mean rating for usefulness of 8.4 / 10), followed by shared data platforms (Achieved a mean rating for usefulness of 7.6 / 10) and then shared physical workspaces (Achieved a mean rating for usefulness of 7.4 / 10).
- The most popular capacity building and leadership development initiatives of interest to respondents were in the areas of financial management, measuring and evaluating impact, and leadership development and people management.
- Other resources that third sector stakeholders believed would be useful for a reimagined third sector included periodic manpower surveys, effective fundraising training, training to understand government services and to better collaborate with Government, and advocacy around policy changes that would benefit the third sector.

To be successful, respondents believed that leadership for a reimagined third sector should be unbiased, committed, organized, trustworthy and held accountable for meeting all timelines and objectives. While most respondents felt that a reimagined third sector initiative could be led by an advisory committee, a few had reservations about whether this was the most effective approach.

## Perceptions of Third Sector Performance

Respondents believed that the main purpose of Bermuda's Third Sector should be to understand current and future community needs and to fill in the gaps in the provision of services for meeting those needs.

*"To have an understanding of specific community needs and to develop solutions for trying to address them. Whether it is providing service or funding, the goal should be to address needs. We also need to understand how our efforts impact society more globally rather than focusing only on our focus areas."*

When asked to rate how well the third sector was achieving this purpose on a scale of 0 to 10 (10 being the highest score), the average rating was *fair* (6.4/10).

Better collaboration and communication, better understanding of the needs of the community, better alignment of resources, and increased funding were identified as key areas that needed improvement.

In addition to increased funding, respondents believed it would be important for donors to understand what the third sector was doing, and how their funding was being used. Having clear project objectives and measuring outcomes were identified as key for assessing whether funds were being used effectively.

*"More of a focus on collaboration and impact measurement. Organisations need to have systems that identify community needs and that measure the impact that they are having on these needs."*

Respondents believed that improved collaboration would help the third sector to reduce redundancy in services, provide better allocation of resources, and improve the quality of service it provided to the community.

*"More collaboration so there is less duplication of services. That would reduce the same types of charities from going to the same donors and would allow them to be able to expand their resources by sharing the resources."*

## A Vision and New Direction for Bermuda's Third Sector

The most popular elements of a collective vision for Bermuda's Third Sector were collaboration and communication and working in alignment to identify and address the greatest needs in the community. Working together would allow for more efficient operation, and better allocation of resources to get services to the people who needed them.

Respondents stated that achieving this vision would require the right structures and leadership allowing appropriate groups to collaborate and agree on priorities of what needed to be accomplished. A holistic view of the services was important for ensuring that there was a continuum of service without gaps.

*"Will need leadership, coordination, programmes, services and advocacy (e.g., on behalf of non-profit organisations to Government and philanthropy). Structures that encourage the third sector to work together to understand the needs of Bermuda and to meet these needs."*

*"I think some of it comes down to us all sitting at the table to understand what the needs of the community are. Then we can decide what needs to be accomplished, who is going to be responsible for what, and how we can work together (when appropriate) or as separate entities to achieve these goals. We need to operate from the same vision and goal and do our best to work together and to work more efficiently. It needs to be more about how we meet and not about how we compete."*

Another important consideration for achieving this vision would be how to hold organisations accountable to ensure that they were achieving their intended outcomes. Having measurable outcomes would increase accountability and transparency ensuring everyone would know whether initiatives were successful. Accountability also meant having standards and ensuring that only qualified people were performing services.

Respondents stressed that improved relations and communication between philanthropy (donors and foundations) and non-profit organisations would also be important for achieving a collective vision. They felt that donors needed to understand and acknowledge what non-profits were doing, and to make a better effort to empower them, rather than enforcing their own agenda or impeding progress with cumbersome processes such as rigorous grant applications.

*"Donors and non-profit organisations need to work together. In particular donors need to take the time to get to know non-profit organisations and not force them to adhere to rigorous and often less useful application processes that do not align with demonstrating their efficacy. We need to create a more manageable application process and return to the days when we met with charities to learn about what they do and how it contributes to society."*

Respondents acknowledged that achieving the vision could be difficult because organisations had their own thoughts on what the priorities should be, and nepotism or favouritism would need to be addressed and eliminated.

### Understanding the Needs of the Community

Respondents unanimously believed that understanding the needs of Bermuda's community was very important to the success of Bermuda's Third Sector (i.e., all respondents rated it 10 out of 10). Understanding needs was deemed critical to addressing key issues and a failure to do so would lead to a third sector that was operating "blind".

When asked to rate how well third sector stakeholders understood Bermuda's community needs on a scale of 0 to 10 (10 being complete understanding), the average rating was 7/10 which indicated only a *fair understanding* of Bermuda's community needs.

While it was believed that some organisations were conducting research to understand community needs, the majority felt that there was a lack of available data for understanding the needs of Bermuda's community.

Respondents stated that a comprehensive research tool that included socio-economic data on community-wide issues would be useful for identifying root causes and creating plans for addressing community needs.

Respondents believed that periodic census data provided by Government on social service needs, and independent research conducted by non-profit organisations or charitable foundations which was then shared with the third sector, would be useful tools for understanding community needs.

In addition to quantitative data, respondents believed that more detailed information obtained from focus groups and face-to-face meetings with key segments of the community and stakeholders, would be helpful for providing a deeper understanding of community needs.

Once all information was collected, it would be important for it to be shared with the third sector community so that collective plans could be made for meeting community needs. Respondents felt that databases, research reports and newsletters that were easy to interpret could be shared virtually (e.g., via email or on a website). In-person or virtual presentations and meetings would be useful for ensuring that the third sector understood the information and could create plans for better addressing community needs.

### Importance of An Equity & Social Justice Approach

When asked to rate how important an equity and social justice approach was for understanding the needs of the community, the average rating (9.7 / 10) indicated that it was perceived as *very important*.

*"An equity and social justice approach aims to understand the conditions in society that lead to disparities in the community based on demographic factors such as race, social class and gender. Using a scale of 0 to 10, where 10 is "Very important" and 0 is "Not at all important", how important is an equity and social justice approach to understanding the needs of Bermuda's community?"*

An equity and social justice approach was perceived as important because respondents believed that many social issues that the third sector was addressing stemmed from a lack of equity. Respondents felt that it would be important to "level the playing field" when providing services and funding to ensure that resources were being allocated to the greatest needs.

An equity and social justice approach was also seen as important for *understanding the root causes* of why particular needs existed.

### Third Sector Collaboration

To determine ways that the third sector could best collaborate to better meet community needs, respondents were asked for their feedback and opinions of three broad categories of collaboration:

1. Project Collaboration Toward Shared Goals

A form of collaboration whereby third sector groups or individual stakeholders work together toward shared goals. For example, a group of organisations might work together to provide meals during a period like COVID-19 for families in need.

2. Third Sector Networking Building

A form of collaboration whereby stakeholders meet to discuss, learn about and advocate for the third sector. These organisations are usually funded by government, philanthropies, and membership dues, and can be organised by different charitable divisions (e.g., social services, art and culture, health, education etc).

3. Collaboration Around Shared Resources

A form of collaboration whereby third sector stakeholders share resources that are needed to operate or achieve their goals such as physical workspaces, administrative services (e.g. bookkeeping, marketing and HR) and shared data platforms (Client Relationship Management (CRM) systems, data-friendly tools for tracking programme/service success or for completing grant applications).

### *Project Collaboration Toward a Shared Goal*

The majority of respondents believed that there was significant value in third sector collaborative project efforts. It was believed that project collaboration could reduce duplication of efforts, provide more effective utilisation of resources, lead to more holistic strategies for addressing community needs, and lead to initiatives that had greater societal impact.

To collaborate effectively, there needed to be mutually beneficial outcomes for all parties and a clearly defined structure and agreement on the objectives of the project. The structure would need leadership to drive results, with each organisation understanding what they were responsible for, and what outcomes they needed to achieve. Accountability was also important and could be achieved through outcome measurement. One respondent suggested the Collective Impact Model as a successful model that could be followed for project collaboration (refer figure 3) (Cancialosi, 2015).

#### **Achieving Large-Scale Change through Collective Impact Involves 5 Key Conditions for Shared Success**

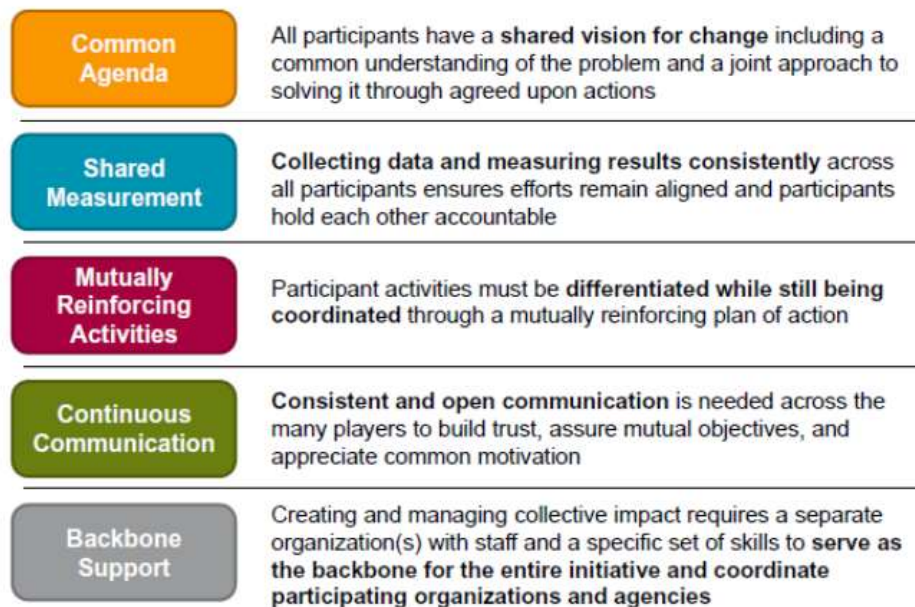


Figure 3. Summary of 5 key elements of the Collective Impact Model

Important considerations or barriers that would need to be addressed to ensure effective project collaboration included:

1. Competition over funding: organisations were used to competing and would need to see the value of the collaboration to their organisation.
2. Ego and attachment: organisations had often worked hard to establish their organisation and did not want to share the credit of their efforts with others.
3. Maintaining brand image: organisations feared that working with other organisations that did not have similar high standards could potentially tarnish their brand image.

### *Third Sector Networking Building*

Respondents were asked whether Bermuda should have a dedicated third sector networking organisation where stakeholders met to discuss, learn about, advocate for, or create solutions around shared goals.

Just over 7 in 10 respondents (73%) believed that a dedicated third sector networking organisation would be useful. They believed that a networking organisation would be useful for keeping the third sector informed about the roles and functions of the different organisations operating within the third sector. They also believed that bringing third sector organisations together could promote project collaboration, data collection and sharing, training and advocacy.

Respondents believed that a third sector networking organisation should be funded by a diverse pool of sources including foundations/donors, government, and membership dues. They believed that the organisation could either be led by someone in the third sector who was well known and respected, or by an independent organisation with a diverse team comprising members from the third and private sectors.

To be successful, the organisation would need to have a clear vision, mission, and measurable goals. To promote accountability and effectiveness, the organisation's efforts and outcomes would need to be measured.

Respondents acknowledged that the success of the organisation would be driven by whether prospective members were motivated to join and participate. To encourage participation, the proposed activities of the organisation would have to be perceived as valuable and useful. This could be accomplished by conducting research or obtaining feedback from prospective members as a part of the creation and formation of the organisation.

Those who were less in favour of a dedicated networking organisation felt that networking was already occurring through the efforts of other organisations, and that for this to be viable, the organisation's mandate would have to go beyond providing networking opportunities by providing other beneficial functions such as training and education.

## Collaboration Around Shared Resources

Respondents were asked to rate how useful the following shared resources would be to Bermuda's Third Sector on a scale of 0 to 10 (10 - Very useful, 0 – Not at all useful).

- Shared physical workspaces
- Managed administrative services (e.g. bookkeeping, marketing, HR)
- Shared data platforms (CRM, data system for measuring success of third sector efforts or for completing grant applications)

Managed administrative services were seen as the most useful (M = 8.4 / 10), followed by shared data platforms (7.6 / 10) and then shared physical workspaces (M = 7.4 / 10).

Reasons for perceiving shared resources as useful or not useful are summarized in the tables below (please refer to tables 1a, 1b, 1c)

*Table 1a, 1b, 1c.* Reasons managed administrative services (1a), shared data platforms (1b) and shared physical workspaces (1c) were perceived as useful or unuseful.

*Table 1a. Managed Administrative Services*

Reasons Useful	Reasons Not Useful
These services can lead to cost savings which would allow third sector staff to focus on their core competencies (i.e., meeting community needs) rather than administration.	HR and Marketing were perceived as less useful because organisations often employed specific strategies for marketing and HR that they felt were better managed internally.
Bookkeeping and IT would be very useful shared services.	

*Table 1b. Shared Data Platforms*

Reasons Useful	Reasons Not Useful
A standardized tool for measuring the success of programs/efforts would be an excellent tool for tracking program success. It would be ideal if one could select from a list of evidence-based outcomes that were aligned with the needs of Bermuda's community.	It is often difficult to share individuals' personal information due to confidentiality and PIPA legislation.
A shared donor portal for non-profits designed by collaborating with funders/foundations would save organisations time in completing grant applications.	It might be difficult to build applications that are flexible enough to adapt to the needs of a diversity of third sector organisations.
A shared CRM providing detailed information about individual clients could be useful for collaborating and referring clients to different services.	The non-profit community might be reluctant to want to take on or learn to use shared resources.
More generally, shared data platforms were perceived as making information exchange amongst organisations easier.	Many of the applications that businesses need are already available in the cloud at affordable rates.

*Table 1c. Shared Physical Workspaces*

Reasons Useful	Reasons Not Useful
Costs savings from being able to share offices, boardrooms, and computing equipment.	Organisations who have to meet in person with clients might need privacy and confidentiality which is difficult to achieve in a shared office environment.
Can often promote idea sharing and collaboration when similar entities are sharing the same location.	The demand has declined because organisations are trending toward working remotely largely due to COVID-19.
Users only have to pay for office space when they need it. Some organisations only need an office space for a few hours per day or a few times per week.	Some organisations do not need a physical workspace.

Respondents stated that an RFP should be used to identify companies who were able to provide shared resources. They believed that this process could be led by the leaders of the reimagined third sector effort.

To ensure that the implementation of shared resources would be a success, respondents suggested conducting research to understand the shared resources that would be beneficial to the third sector. The importance of education on the benefits of sharing resources, and on the terms and conditions surrounding their use was emphasised. One respondent suggested running a pilot study to test the usefulness of different shared resources before implementation.

### Training & Capacity Building Initiatives

Respondents were asked to create a comprehensive list of programs, seminars and training workshops that could benefit Bermuda's Third Sector.

The most popular categories of training included:

- Financial management (funding, accounting, bookkeeping)
- How to measure and evaluate impact and to conduct third sector research
- Leadership development and people management
- Communication skills
- Effective governance
- How to run a board/be an effective board member/understand board roles
- Marketing/PR
- Strategic planning

The majority of respondents believed there needed to be one central organisation that would offer a comprehensive network of training and development opportunities to the third sector. It was believed that this organisation could collaborate with Government, funders, and non-profits to identify entities most suitable for delivering specific training and capacity building. The IAC was mentioned as an existing organisation that might be best positioned to facilitate this. To ensure the third sector was aware of available training, it was suggested that a third sector networking organisation could effectively promote training and capacity building initiatives using email and social media. Another suggestion was to target and advertise to charities by using the Bermuda Government Registrar of Charities list.

Respondents stated that care should be taken to ensure that training and capacity building initiatives were developed to keep the third sector informed of new legislation that may impact organisations (e.g., PIPA), and to ensure that training and capacity building initiatives aligned with international trends and best practices. To continue to meet the training and capacity building needs of the third sector, it would be important to obtain feedback from respondents on these initiatives, and to use that feedback to make improvements.

## Useful Tools for Bermuda's Reimagined Third Sector Effort

Respondents were asked to provide feedback on whether the three tools discussed during the interview (outlined below), should be developed as a part of the reimagined third sector effort.

### *Recap of Third Sector Resources*

1. *Tool for understanding the needs of Bermuda's community*
2. *Collaboration tools and efforts*
  - *Third Sector Project Collaboration*
  - *Third Sector Networking Organisations*
  - *Shared Third Sector Resources (e.g. Physical workspace, administrative services, data platforms)*
3. *Third sector training or capacity building initiatives*

While almost all respondents felt that all these resources might be useful for the reimagined third sector effort, "Understanding the needs of the community" was more frequently named as the most important resource (56% rated it as most important), followed by "Training and capacity building" (32% rated it as most important) and then "Collaboration tools and efforts" (12% rated it as most important).

Respondents believed that understanding the needs of the community was particularly important for creating an effective strategy for meeting community needs. It was believed that the third sector did not currently have a clear understanding of community needs, and that to be effective there needed to be an emphasis on determining the root causes of social problems. Creating solutions which addressed the root causes of social problems would help the third sector work toward mitigating or eliminating social problems.

*"The thing that is most important is the diagnostic work. You need to know what problem you are solving first before you can decide what is needed next. I think that a lot of us know what the needs are. I think that before that, you need to look at the root causes that are causing the needs. Then you can identify the best solutions that deal with the root causes of the needs. Once this is done, future social problems can be reduced or eliminated."*

Training and capacity building was important to ensure that the third sector had the necessary manpower and resources to allow it to be able to accurately understand community needs, to lead and manage organisations, to create solutions for addressing needs, and for determining how the third sector could best collaborate to meet community needs.

*"I believe that training or capacity building is needed because there is a gap. Everything else from there goes up. If you get the people trained, they understand what they need to do and know to lead and manage and grow the organisation, then they are going to know how to understand the needs of Bermuda's community. They are going to know how and with whom to collaborate. They are going to know what organisations they need to grow or build. They are going to know who they need to be working with and the resources that they need."*

Collaboration was seen as important for obtaining a complete understanding of the tools and resources that the third sector currently had available. Respondents felt that collaboration offered an opportunity to promote dialogue for understanding community needs, for determining the training and capacity that the third sector needed, and for creating strategies to work together to operate more efficiently and cost effectively.

*"They all have their place. If you want to start you have to get some collaboration going. You need to talk to the sector as a collaborative to understand what you have as a third sector. Then you can talk about the problems and establish how you can solve them."*

### *Central Place/Portal for Accessing Third Sector Resources*

The majority of respondents (62%) believed that a virtual and physical presence would be useful for gaining access to, or learning about, resources which would be a part of the reimagined third sector effort. Just under 4 in 10 (38%) felt that a virtual presence alone would be sufficient.

Respondents described the ideal virtual tool as a website or “hub” with access to resources such as videos, useful links, webinars, and tools. It would be a place where users could engage in online chats, host online meetings, and download useful documents. A website was seen as a more cost-effective solution and as convenient because it could be accessed whenever the user needed support, information, or resources. A centrally located physical presence was seen as advantageous for in-person training, collaboration, and brainstorming.

### Leadership of the Reimagined Effort

Respondents were informed that an advisory committee comprising 20 stakeholders including non-profits and charities, government departments and ministries, foundations and individual donors and community members could be responsible for the future planning, implementation, and future management of the reimagined effort.

Overall, most respondents felt that a reimagined third sector model could be led by an advisory committee. For an advisory committee to be successful, it was stressed that members would have to be selected using an objective and fair process. It was believed that advisory committee members should be as diverse as possible with respect to demographic factors such as age, income, education, size of organisation and experience level. It would also be important to ensure that advisory committee members engendered trust in the third sector community and were always operating in an unbiased way that benefitted the third sector.

*“Based on my experience with setting up large organisations, you have to engender trust. There needs to be faces that people do not have an aversion to, and that can be difficult because Bermuda is small. The people leading this need to be able to engender trust toward the initiative. . . There also must be clear and objective criteria for selecting people with rationale for why certain people were and were not selected.”*

A few respondents were not sure that an advisory committee would be the best method for driving the initiative because advisory committees often had difficulty making collective decisions due to members having different agendas, conflicts of interest or competing interests. To remedy this, it was suggested that an advisory committee should be led by, or report to, an unbiased organisation or individual that would ensure that the advisory committee was meeting objectives and timelines and operating in a way that benefitted the third sector. Respondents stressed that the initiative should not be donor led but should be led by other entities who were well known, respected and knowledgeable about Bermuda's Third Sector.

*“The reason that some organisations do really well is that they are left on their own. You can just see an unintended consequence by trying to force collaboration, and then the third sector becomes more fragmented. I would be surprised if these stakeholders who all have different agendas can get into a room and agree on 2 to 3 things that they are going to do. I think that this will not be successful because you are pitting organisations against one another who have different timelines and priorities for different outcomes.”*

Respondents stressed that it was important for an advisory committee to have key objectives and timelines, and to be held accountable for meeting them.

Respondents also stressed that continuous communication was important to achieve third sector stakeholder engagement and buy-in, and that an advisory committee should communicate their progress and outcomes in a strategic way that would reach all aspects of the third sector. Suggested methods included email, virtual town hall or ZOOM meetings, social media, a central website or through a newsletter. In addition, respondents stressed that there needed to be a mechanism for stakeholders to provide feedback on how they felt that the initiative was progressing.

### Closing Message for Ensuring Reimagined Effort Will Be Successful

Respondents were asked to offer a closing message or piece of advice for helping to ensure that the reimagined third sector effort would be a success.

The key messages were as follows:

- Find the right people to manage the initiative and hold them accountable in terms of tasks and deadlines.
- Ensure that all activities are evidence-based and that their impact is measured.
- Be as inclusive and diverse as possible in terms of those playing a key role in managing the initiative. This should not be donor led.
- Encourage open communication within the third sector and solicit their feedback. Be transparent. Transparency engenders trust.
- Be flexible and open to feedback and alternative ways of doing things.
- Ensure that the broader community understands the important role that the third sector plays in Bermuda. This will help the sector to obtain the respect and support that it deserves.
- Start to articulate the initiative in a way that speaks to something more than the third sector working better together. The key message should better encompass the full scope of the initiative, such as “developing frameworks that can strengthen the third sector”.
- The message should not communicate that the third sector is not currently working. It should communicate that we are “taking it to another level!”.

## Conclusions/Next Steps

The research provides support for the following recommendations and next steps for ensuring that the reimagined third sector initiative will be a success:

- ❖ Ensure that the new framework has strong and effective leadership, mutually beneficial outcomes for all parties, a clearly defined structure, and agreement on the objectives.
- ❖ If an advisory committee is selected to lead and implement the initiative, ensure that the membership selection process is fair and transparent, and that the group encompasses a diverse demographic range of members that are trusted by the third sector.
- ❖ Ensure that the leadership of the initiative adheres to clear objectives and timelines and that decision-making is objective and ethical.
- ❖ Make certain research into understanding the needs of the community is a priority. Without this understanding, building a collaborative model based on a shared understanding and agreement of the hierarchy of needs will be difficult to achieve.
- ❖ Determine a central resource, possibly Government or a collaborative effort including non-profits and the private sector, to gather and manage a comprehensive database of third sector data for understanding the needs of the community.
- ❖ Determine a central resource that can offer comprehensive training and capacity building opportunities for the third sector. This organisation could collaborate with Government, foundations, and non-profit entities to identify entities most suitable for delivering specific training and capacity building. Training and capacity building should include all resources needed to advance the vision of the reimagined third sector effort.
- ❖ Ensure stakeholders understand the value of a collaborative model, and its role in promoting shared knowledge, shared resources, project collaboration and effective program delivery.
- ❖ Consider how funding will be allocated in a collaborative model to encourage participation and to assuage stakeholders' fears of losing funding. Ensure donors understand the role of the third sector and how to make effective funding decisions based on needs and evidenced based outcomes.
- ❖ Communicate progress, outcomes, and any other relevant news to all stakeholders on a monthly or bi-monthly basis via email, virtual town hall or ZOOM meetings, social media, a central website or through a newsletter. Ensure stakeholders have the ability to offer feedback and suggestions for improvement.

Before implementation, these results should be validated by conducting research with a representative sample of stakeholders including Government, non-profit organisations, donors, religious organisations, and the private sector.

## DETAILED FINDINGS

### Interview Respondents

A total of 26 third sector stakeholders were interviewed (refer to table 2) including 6 non-profit organisations (direct service providers), 6 Government officials, 5 quangos, 5 foundations and 4 private consultants.

*Table 2.* Types of third sector stakeholders interviewed.

Type of Non-profit Stakeholder	Total	Percent
Non-profit (direct service provider)	6	23%
Government	6	23%
Quango	5	19%
Foundation (Corporate, private, community)	5	19%
Private Consultant	4	15%

Respondents had been working in the third sector for an average of 18.8 years (refer to table 3). Respondents' involvement with the third sector was varied and included work with multiple organisations in a variety of roles including volunteering, directing organisations, or serving as a board member.

*Table 3.* Tenure working in the Third Sector.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
1 - 10 years	15%	33%	20%	25%	0%	0%
11-19 years	38%	33%	40%	0%	67%	40%
20 or more years	46%	33%	40%	75%	33%	60%
Average	18.8	19.5	15.4	21.3	16.7	22.2

## Greatest Accomplishments

When asked to recall their greatest achievements as it related to the third sector, respondents were proud that their efforts benefitted the community and helped people in need. Being more strategic in planning and collaborating, particularly with the COVID-19 response were also considered achievements. Lastly, being successful in fundraising to enable important programs to be put in place was an important achievement.

### Selected Verbatim Responses:

- *“Collaborating about how to work with people who are less fortunate and being able to help [them] through their times of trouble, whether it is housing, financial, social.”*
- *“Collaboration, designing strategic plans, watching people benefit from third sector work.”*
- *“Raising [a large sum] in donor funding.”*
- *“We are more professional today than we were before. We have a better understanding that we have to work together.”*
- *“Bringing more clarity around standardized outcomes and what the impact looks like. Bringing a large set of local research and social sector research, publishing it, and making it available. Establishing some ways that people can coordinate giving, both mechanisms and structure as well as approach.”*
- *“The greatest achievement is knowing that you have helped somebody.”*
- *“Being dynamic in meeting the needs of the community especially around COVID-19. Doing a lot with a little and really trying to be intentional about operating from a ‘theory of change’.”*
- *“It is hard to overlook what the sector did this year in organising resources during COVID-19 ... I think stepping in was big for us especially this year with mass unemployment in providing these needs.”*

## Desired Resources Support & Tools

Respondents were asked what resources, support or tools would help them to achieve their goals. Access to information and training would help an organisation better assess the needs of the community and the organisation's effectiveness in meeting those needs. More funding for better resources and infrastructure was another common request.

### Selected Verbatim Responses:

- *"Access to information. There is a lot of data from the Department of Statistics but it is not interactive. It is often not up to date or presented in a well-organised format. As an example, the US labour site provides a wealth of information where people can log on, gain access to what they need and quickly figure out if they are making the right decisions for their organisations. Bermuda needs easier access to organised data and information without having to go through 36-page PDF documents."*
- *"A database of non-profits, almost like a charity navigator but local. That would be first and foremost as an important tool. I know that Centennial Foundation is working on this but some sort of collaborative of large-scale funders to talk about how to tackle issues because we can't do it by ourselves."*
- *"We are very challenged in terms of a limited bandwidth of resources. We have had a lot on our plate, so I think that time is our biggest constraint. Access to good information such as financials, people, visions, and missions, etc. There is a need for people who can actually execute on a good idea."*
- *"If we were more appreciated and if we had better infrastructure. Funding to be able to build out that structure that we know is needed in order to improve outcomes and to be able to provide support to groups that require services."*
- *"At this time finances is the greatest need for us."*
- *"More overseas conferences on the operation of foundations, education on the corporate giving side."*

## Top of Mind

Respondents were asked to recall top of mind adjectives for:

- The role of Bermuda's Third Sector
- The biggest issues facing Bermuda's Third Sector
- Organisations that support Bermuda's Third Sector
- Tools or resources that are available to Bermuda's Third Sector

### "The Role of Bermuda's Third Sector"

The top responses centred around how "vital", "necessary" and "important" Bermuda's Third Sector was. It was seen as "filling the gaps of community services" and called to mind words such as "charity" and "helping agencies".

Selected Verbatim Responses:

- *"Integral, vital."*
- *"Imperative, critical."*
- *"Important, necessary, empathetic."*
- *"Supporting the community, helping to build community well-being and filling gaps of community services."*
- *"Helping agencies, public and private partnerships."*
- *"Filling the gaps, charitable service."*
- *"An area or niche that is not serviced by Government or by industry, so it fits a gap that exists in every community and in every economy in every country. The lost portion that doesn't fit into Government planning and industry economy."*
- *"Charity, helping, feeding."*

### "The Biggest Issues Facing Bermuda's Third Sector"

Funding or financial stability was the top issue identified for Bermuda's Third Sector. However, having adequate funding was not enough; knowing how to be strategic in applying the funding to have the greatest impact, and being able to measure that impact were also concerns. Respondents also mentioned better collaboration and understanding of the needs of the community as issues facing Bermuda's Third Sector.

### Selected Verbatim Responses:

- *"Funding is huge. I think we have never seen anything like the amount of people needing charitable help."*
- *"Funding - I think that funding is what everyone is needing and looking for but I don't think that we are seeing how our funding is translating to transformation. To me the third sector should start to devolve in some ways because the results have led to transformative change. Mergers should happen because mission statements change because they have met goals and targets. Populations changes lead to changes in goals in the organisation."*
- *"Funding, collective action, the need for social agenda, understanding the needs of the entire island."*
- *"Financial stability from an operational perspective, needing finances."*
- *"Lack of funding and lack of cohesion."*
- *"A decrease in fundraising opportunities, the need for collaboration and they are vital to the running of our country."*
- *"Clarity of purpose, execution, lack of high standards, lack of outcome or impact measurement, financial understanding, transparency, knowledge of building an infrastructure and the importance of doing so."*
- *"The ability to measure outcomes."*

### "Organisations That Support Bermuda's Third Sector"

Donors, charitable organisations, foundations, and big businesses were the top responses when asked to recall organisations that supported Bermuda's Third Sector. Banks and churches were also mentioned.

Specific organisations mentioned included Bermuda Community Foundation, Centennial Bermuda Foundation, Government, and IAC.

Some respondents questioned whether donors understood the third sector and knew what they were supporting, which could perhaps be impacting funding decisions.

### Selected Verbatim Responses:

- *"Bermuda Community Foundation, corporate sector and to a lesser degree, Bermuda Government."*
- *"Companies like the Bank of Bermuda Foundation - I know that they are now called the Bermuda Centennial Foundation and the Bermuda Community Foundation. I think those are two that have really stepped up throughout COVID."*
- *"Funding organisations, donors, philanthropies."*
- *"Donors, foundations, big corporations and businesses."*
- *"Donors, Government in an ideal world, corporate donors and foundations."*
- *"Banks, exempt companies."*
- *"The businesses that provide resources, financial or otherwise to the group of individuals or companies that may work directly with Government. It is almost like a second tier but they are not actively involved other than they are providing resources to the sector that is actively involved in making sure that those resources are where they need to be."*
- *"It is the full range from churches through to focused charities to not for profits to individuals who have dreams and ideas of how to help the third sector to power house funds, trusts and venture capital that looks to plough profits into those sectors."*
- *"Committed, unaware, I don't think they understand the sector in its totality, fleeting, we're losing them very quickly."*
- *"Need to know what the third sector actually does."*

### “Tools or Resources That Are Available to Bermuda’s Third Sector”

“People” was identified as the top tool or resource available to Bermuda’s Third Sector. This included acting as volunteers or providing expertise and guidance to charities. Training, standards, accreditation, and funding were also recognised as top resources.

Specific organisations mentioned included Bermuda Community Foundation, Centennial Bermuda Foundation, IAC, BEDC and Ignite.

Respondents were able to call to mind quite a few available resources, but some felt that the resources were minimal, limited or somewhat inadequate, and not available in Bermuda.

#### Selected Verbatim Responses:

- *“Money or people that provide assistance.”*
- *“People, money and best practice.”*
- *“Training and education, handholding, support, boards and development.”*
- *“Program standards, accreditation and certification, some training.”*
- *“Volunteers, each other, Government provides grants to charities.”*
- *“Varied, limited.”*
- *“I think they lost some resources with the closure of the Centre on Philanthropy. I think about training around capacity building and understanding grants. I think some resources are missing and their financial stability is in question.”*
- *“Funding is a huge one and expertise. Help from the third sector on how to do certain things, they have put on programs and workshops. They have reached out on a regular basis which is huge especially during COVID.”*
- *“IAC, Centennial Bermuda Foundation and Bermuda Community Foundation.”*
- *“BEDC generally provides some tools and resources. Ignite is providing some resources, and the IAC is doing a good job at providing services.”*
- *“Somewhat inadequate. Sometimes we have to go overseas to get what we need versus it being available at home.”*

## A Vision and New Direction for Bermuda's Third Sector

### Main Purpose of Bermuda's Third Sector

Respondents were asked what the main purpose of Bermuda's Third Sector should be. Filling the gaps in service and helping those in need were the top responses. It would also be important to understand the current and future needs of the community to ensure concerns were being addressed.

Removing barriers to service by providing low fee or no fee access to services should also be a purpose of Bermuda's Third Sector.

Some respondents felt that the Government should not be responsible for providing all services, and that the third sector was a necessary supplement to Government services.

### Selected Verbatim Responses:

- *"The third sector sits in that space between public and private, so it should be filling the gap that the public sector cannot meet and perhaps should not meet."*
- *"Helping people in need. Predicting the future needs."*
- *"To meet charitable needs and to determine the needs of the most disadvantaged."*
- *"To have an understanding of specific community needs and to develop solutions for trying to address them. Whether it's providing service or funding, the goal should be to address needs. We also need to understand how our efforts impact society more globally rather than focusing only on our focus areas."*
- *"If we are saying that [the third sector] is the charities combined with donors and any other resource necessary, then it is a response to the social concerns on island. A coordinated response, a collaborative response to the social challenges that we face. Secondly, it should also be, to be involved in the economic development of the community."*
- *"To fill in gaps in our society of critical services and programs to meet the needs of our community that Government cannot do. Every human has the right to treatment of chronic diseases. We have a right to no cost counselling and mental health treatment. We need to have these services where cost is not a prohibited barrier."*
- *"To provide a needed service free of charge for those that can't pay; to develop different areas of community to assist them."*
- *"We are filling in the gaps that the Government can't provide or doesn't provide well. That is the fundamental element."*
- *"Providing products and services with regards to the needs of our community. I also see them as supplementing the social service provisions or the support of provisions that the Bermuda Government provides. I don't see the third sector's role as being instead of, I see it as being a supplement to what Government provides."*
- *"It is to ensure that the charities that they deal with are supported or they can look into how they can be supported. The Government cannot take full responsibility. I think that there needs to be a true responsibility of the community to also act with the third sector."*

### Third Sector Performance

Respondents were asked to rate how well the third sector was achieving these purposes on a scale of 0 to 10 (10 being the highest score) (refer to table 4).

Overall, respondents believed that the third sector was doing a *fair job* at achieving the purposes that they believed it should achieve (M = 6.4 / 10).

*Table 4.* Rating out of 10 (10 – highest score, 0 – lowest score) for whether respondents believed that the third sector was achieving important purposes.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
10 - Highest Score	0%	0%	0%	0%	0%	0%
9	4%	17%	0%	0%	0%	0%
8	35%	33%	20%	25%	83%	0%
7	12%	0%	0%	25%	0%	40%
6	15%	17%	20%	25%	17%	0%
5	19%	33%	40%	0%	0%	20%
4	15%	0%	20%	25%	0%	40%
3	0%	0%	0%	0%	0%	0%
2	0%	0%	0%	0%	0%	0%
1	0%	0%	0%	0%	0%	0%
0 - Lowest score	0%	0%	0%	0%	0%	0%
9 to 10	4%	17%	0%	0%	0%	0%
Mean	6.4	6.8	5.6	6.3	7.7	5.4

When asked what would help better achieve the main purposes of Bermuda's Third Sector, the top responses were better collaboration and communication, better understanding the needs of the community, better alignment of resources and increased funding. In addition to increased funding, it would be important for donors to understand what the third sector was doing, and how their funding was being used. To help with that understanding, the ability for organisations to be more strategic in their operations and to be able to measure outcomes would be important.

Improved collaboration would help reduce redundancy in services, provide better allocation of resources and provide better service to the community.

## Selected Verbatim Responses:

- *"We have started some conversations, and in those conversations, we realized that we actually have the same concerns. I think that COVID-19 has shown us that individual efforts will not do it, we have to collaborate at some point. We need to continually collaborate because at the end of the day it appears that most of the time we may have similar clients or similar categories of clients, so if we work together I think that we would be in a better place. Then the clients that we are serving would understand that there is a general effort in seeing them do better."*
- *"Before I would have said collaboration but I believe that we are on that path, especially this year. I have really noticed a difference in the way that organisations are collaborating and we have been collaborating a lot with different organisations for our virtual content."*
- *"More collaboration so there is less duplication of services. That would reduce the same types of charities from going to the same donors and would allow them to be able to expand their resources by sharing the resources. Being more innovative and creative when it comes to soliciting funds and donations."*
- *"A collective mind, i.e. getting better at doing it together. Some of the events that the Bermuda Community Foundation has been trying to pull together like the reinstatement of the donor form. I think that can help us get better. More input from Government about how they are trying to approach a problem so that we can align ourselves appropriately."*
- *"Organisations have the ability to work more effectively and efficiently if they work together. We need more of that. More funding and Government investment is needed to deal with many problems in the community."*
- *"I think easier and more access to funding is needed. Funding organisations need to take the time to understand non-profits, who they are, what their needs are, and donors need to make their processes more user-friendly and better adapted to the needs of non-profit organisations. I think a collective donor group that can meet to understand changes that can be made to better meet the needs of Bermuda's non-profit sector would go a long way in terms of making funding more accessible to all."*
- *"I think coming to a common understanding of what the big picture needs are and focusing on developing solutions to meet these needs."*
- *"My main focus is that people know what we are doing and that we are actually doing things efficiently. Effectiveness of programs and reporting accurately. . . what is your giving doing long term, are they actually benefiting or is it a temporary fix versus true alleviation."*
- *"It is about both a mindset change and then actually a change in how we allocate and run programs. The mindset change will be that we have to do this better and we have to work in more of an evidenced based way. The actual infrastructure change or capacity change will be that we have to train and we have to make sure that whatever we are doing meets best practice. Best practice in leadership, best practice in non-profit management, best practice in managing funding and best practice in documenting and measuring outcomes."*
- *"More of a focus on collaboration and impact measurement. Organisations need to have systems that identify community needs and that measure the impact that they are having on these needs."*
- *"There needs to be leadership development, there needs to be understanding of best practices, financial budget management, there needs to be controls. I would say that at almost every single level of the infrastructure there are huge gaps in the majority of Bermuda's charities and I don't think that they know how to identify those or how to identify to the donor community what the key outcomes should be. Donors are complicit too, if you just write a cheque and do not hold the recipient to a standard. I think that is probably half of the issue here, people associate giving with just writing a cheque as opposed to being really thoughtful about how that cheque is spent. I think that donors have to recognize the part that they play too."*

## A Collective Vision for Bermuda's Third Sector

When asked to create a collective vision for Bermuda's Third Sector as a whole, the most popular elements of the vision were collaboration and communication amongst the third sector; working in alignment to identify and address the greatest needs in the community with the ultimate dream of becoming redundant when people were no longer reliant on services. Working together would allow for more efficient operation, and better allocation of resources to get services to the people who need them.

### Selected Verbatim Responses:

- *"That we work together. That for major issues we have a collective voice, we speak together with one voice and that if there are goals that need to be achieved that are difficult to achieve with many voices it is easier to achieve that goal."*
- *"Creating a stronger partnership between donors and non-profit organisations who work together to meet the needs of Bermuda's community."*
- *"The vision would be rooted in an aligned concept about a continuum of care in Bermuda. In other words what [our organisation] did when it first began was to identify all of the issues in Bermuda and then look at which organisations or agencies are in a place to address those issues and see where there are any gaps. And then collectively attempt to fill those gaps as well as possible and to ensure that the agencies that could help stayed in place by having effective tools."*
- *"Providing services to populations with the greatest need, and the greatest need is quantifiable and measured. Provision of service is quantified, and impact is quantified. These service providers are also supported by an effective infrastructure that helps them to identify and fill gaps."*
- *"Sustainably meeting the needs of the community as those needs evolve over time. It is like the BCF vital signs. It is responding to the biggest needs in the community over time in a way that creates a fair and vibrant community. So, it is across all sectors whether that is education support, arts or human services. It doesn't matter where the country is, and the third sector needs to morph to respond to that."*
- *"It is understanding the root causes of problems, because you can keep providing services but if you don't get to the root causes of it, you aren't going to make the lives of the people in the community any better."*
- *"The ultimate dream would be to get everybody to that point where they are no more reliant on support services, they are in a position where they can contribute, and they feel like they have a purpose."*
- *"To make themselves redundant because they have addressed all of the key needs of the community."*
- *"Allocation of resources and getting people to the correct services. That involves more communication within the third sector and the organisations themselves."*
- *"A one stop shop. I like the idea of the third sector working together. If I am a member of the community and I need resources, I would like to go through one portal. Like a triage so they can tell me where to go."*
- *"Having resources to operate efficiently from bookkeepers to the Executive Directors. Operating effectively and efficiently to meet the community's needs."*

### *How to Move Towards the Vision*

Respondents were asked how the Third Sector could move toward a collective vision. Achieving the vision would require structures and leadership so that groups could collaborate and agree on priorities and what needed to be accomplished. A holistic view of the services provided was needed to ensure that there was a continuum of care without service gaps.

An important consideration would be how organisations would be held accountable for the funds spent and outcomes achieved. It was suggested that Government could provide the oversight.

Another consideration was for donors to understand and acknowledge what non-profits were doing and to empower them, rather than enforcing their own agendas or impeding the non-profit's progress with cumbersome processes such as rigorous grant applications. In addition, donors should understand that funding should be sufficient for ensuring that people were paid appropriately for the work they were doing.

It was acknowledged that achieving the vision could be difficult because organisations had their own thoughts on what the priorities should be, and nepotism or favouritism would need to be addressed and eliminated.

#### Selected Verbatim Responses:

- *"I think some of it comes down to us all sitting at the table to understand what the needs of the community are. Then we can decide what needs to be accomplished, who is going to be responsible for what and how we can work together (when appropriate) or as separate entities to achieve these goals. We need to operate from the same vision and goal and do our best to work together and to work more efficiently. It needs to be more about how we meet and not about how we compete."*
- *"There needs to be a mapping of the holistic ecosystem of Bermuda; who is doing what, who is providing what services, what is the cost of delivery of those services, where are the overlaps, where are the gaps, who is best positioned to deliver the services for those gaps. Because what we find in a lot of charities is that a child will go through one social service, then they may get dropped because there is no one to provide those services, and then the work that was done by the previous agency is usually lost. There has to be a collective understanding of the services out there based on the needs."*
- *"To collaborate, to come together to create strategic plans that look at the short and long term. That would require bringing all of the relevant stakeholders together and mapping out how that process will look and look at whether it is feasible. Collaborating together to provide the same standard of service."*
- *"There are a lot of common goals being achieved and I think that there is a lot of money being spent by the different organisations that if they were to come together there would be a lot of cost saving."*
- *"I think what Centennial Bermuda Foundation has been doing. Invite funders and non-profits and Government to sit at a table and at least start the conversation."*
- *"Will need leadership, coordination, programmes, services and advocacy. Structures that encourage the third sector to work together to understand the needs of Bermuda and to meet these needs."*
- *"That is very difficult ... The problem is that infighting started about who would have the biggest voice. There is always one charity that feels that they are more important than another charity. It is trying to get all charities to feel that even if they are a tiny charity that they are helping somebody. Even if it is one person that they have helped it is so important."*
- *"I think that we have to be prepared to call out and no longer tolerate where practitioners or people who are just ill qualified are using and exhausting resources that need to go in different places. It is about holding each other accountable for the work. Then there is that piece around making sure that we adapt the standards so that everything you do has to be evidence based. Because Bermuda has always been so relational you want to keep the*

*relationship but not base decisions on it. In other places there are such entities that have an ethics board and to a degree it is public, and there must be a way to do that respectfully. And the other thing that we can start to do is that for every single position that we want somebody to fill, we need to identify the qualifications and hold people accountable to them. Every bit of money, every opportunity, everything that we would want and expect in the public sector or the private sector has to be transparent in terms of application, in terms of how people get into these positions. No more friends and family appointments, it is not good for us and it is not healthy for us."*

- *"Donors and non-profit organisations need to work together. In particular donors need to take the time to get to know non-profit organisations and not force them to adhere to rigorous and often less useful application processes that do not align with demonstrating their efficacy. BOBF and BCF at the moment have led the way on this relationship and have set rigid standards for how charities should apply for funding and how they should work together which is often not perceived as useful to all charities. Charities have become afraid of them because they hold the funds that they need and are reluctant to speak out against them. We need to create a more manageable application process and return to the days when we met with charities to learn about what they do and how it contributes to society."*
- *"There needs to be an empowerment of agencies to come together to actualize what they should be capable of doing with the right tools. They should be given those tools without it feeling like a handout ... sometimes they [donors] will take the wheel and say, 'let us just do this and we will pull you along'. I have always appreciated what donors have given charitable organisations the ability to do but what I love most is the donors who empower you to do it. Sometimes the parent/child relationship is all wrapped up in because they have money. It is really important for sustainability of the sector to help charities understand and appreciate the value they have, find their strengths and work with them so that they are actually empowered."*
- *"Donors on the island really get to know and understand what each non-profit or charity does without making the assumption that there is all of this duplication. Without the assumption that we should be run by volunteers and don't need to get paid. Provide us with salaries that mean we can also afford the cost of living here."*
- *"More resources and especially funding for capacity building. Being able to hire and pay people that have the capacity to lead organisations and train within organisations to improve their skill set."*

### *Areas of Emphasis for Collective Vision*

Respondents were asked to rate how much emphasis should be placed on a number of areas when considering a collective vision for the third sector (refer to table 5). The top three areas that respondents believed should be most emphasised were accountability, systems change and coordinating programs/services.

*Table 5.* Whether respondents believe different areas should be emphasised as a part of a third sector vision.

	Top 2	5 – Complete emphasis	4	3	2	1 – No emphasis at all
Accountability	100%	88%	12%	0%	0%	0%
Systems change	96%	65%	31%	4%	0%	0%
Coordinating programs/services	92%	77%	15%	4%	0%	4%
Expanding or strengthening programs/services	85%	50%	35%	12%	4%	0%
Leadership development	84%	72%	12%	12%	4%	0%
Equity & Justice	81%	77%	4%	19%	0%	0%

### *Other Important Focal Areas*

When asked if there were any other important areas that the Third Sector should focus on, respondents cited measurable outcomes, collaboration, and accountability.

Having measurable outcomes would increase accountability and transparency so everyone would know whether initiatives were successful. Accountability also meant having standards and ensuring that only qualified people were performing services.

#### *Selected Verbatim Responses:*

- *“Evaluation and monitoring of things that they do. They need to continually measure or assess what they are doing to assess if they are actually making an impact or being successful.”*
- *“Measuring outcomes of non-profit and helping organisations.”*
- *“Transparency from all involved. Donors being transparent about the criteria for funding. Non-profits being transparent about their efforts and providing concrete data to show the efficacy of what they do.”*
- *“Collaboration, but also streamlining so there aren’t two charities doing the same thing.”*
- *“Yes, cost saving measures and common goals that they share and understand how they fit in with Government so that we can all work together.”*
- *“If I am defining accountability, it would be both program integrity as well as practitioner integrity. When I say that I mean practitioners that are trained and qualified on the field or program that they are proclaiming to run. For example, if you don’t have a degree you should not be doing drug counselling.”*

### *Opinions on Bermuda Government’s Charities Act*

Respondents were asked to offer any opinions on the Bermuda Government’s Charities Act. The majority saw the Act as serving the necessary function of ensuring that charities in Bermuda were operating ethically. They believed that the Act prevented money laundering and provided some safeguards against the misuse of donated funds. A few respondents felt that the Bermuda Government needed to do a better job at enforcing the Act, by requiring all charities to keep up to date with their reporting.

The biggest criticisms of the Act were the complexity of reporting and its legal requirements. Respondents described the reporting as “complicated”, “cumbersome” and time consuming, and as significantly distracting them from focusing on meeting community needs. Respondents believed that the compliance process could be streamlined. They suggested providing resources to assist charities with reporting and creating a more user-friendly online registration tool. It was also suggested that the fees associated with the Act could be reduced.

Respondents felt that the data collected by the Charities Commission could be invaluable to Bermuda’s Third Sector if it were reported. They stated that the data could help them to better understand the third sector in terms of who it employs, the costs of services provided, and the types of charities available in Bermuda. Having access to this information could be a great resource for preventing the duplication of services, and for promoting charitable collaboration.

## Selected Verbatim Responses

- *"It has become complicated. Charities were established because somebody wanted to do good but they often get bombarded with all of the red tape and legalities around being a charity and that tends to take away from what their original intent was. That is causing more problems than it is worth and that need that the charity was trying to fulfil gets lost. The solution is not just amending the Act. If they could assist them with meeting all of these legal challenges, and all of the things that are required to be a charity and let those that are running the charity do the good work and you have someone making sure that they are in-line with the Act then you have a good match."*
- *"The Registrar's Office is highly under-resourced regarding the enforcement of the regulations. The charity commissioners are not necessarily selected based on their ability to fulfil the role. Some people have no clue about the needs and operations of the non-profit sector. There is a wealth of data that they could be collecting that would give us more insight into non-profit organisations in Bermuda. There is a huge opportunity for them to collect data and to share it with the third sector. The Act in my view is unrealistic because it means that charities have to collect and be up to date with so much information which increases the cost and complexity of operating. I get that it is important from an AML perspective, but the requirements are unrealistic."*
- *"That follows the UK's Charities Act. I think that it is really important because it is making charities be accountable. That is essential because there has been a time when there have been charities that have started that aren't really charities and they have taken away funding from people who really do a good job."*
- *"I realize why it is important to have the Act because you could have people taking advantage of it personally. To remain a charity you have to have policies in place so that donors know that their money is being used appropriately."*
- *"It doesn't govern very much; it needs to be far more structured to give people that are donating more faith that there is regulation on their donations. You need to have a proper audit control of all the charities that submit their annual reports. At the moment there are a number that fail to submit them and there is no follow-up."*
- *"The Charities Act is a good step towards greater accountability for charities. Years ago we used to talk about the fact that you could become a charity by doing two things, establishing a board and turning in your financials. When the Act was upgraded, it gave it some more teeth in terms of accountability, so I think that it is a good start."*
- *"It could be refined with how it classifies non-profits. They are already collecting data, the potential for that role to expand so that the data is usable and shareable so that we can understand the value of the sector better; who is employed and what is the total cost of services provided so that we have a clearer picture."*
- *"It is a tough process to go through. Recognizing that it should be tough because we are also protecting against money laundering, the waste of money and the mismanagement of money. It is quite a rigorous process to go through, so maybe give a little bit more time for things to happen or don't ask people to redo something every year."*
- *"It needs to be streamlined to be more efficient and more affordable. With the Act, there was an increase in fees for all charities, so the more money that you raise through fundraising, the more that you have to pay in fees."*
- *"I think that it is unnecessarily cumbersome. The mechanism for accountability is too heavy for the risk. How can it better serve the needs of charities? At this point, it is what it is and I know that it would be too hard to change legislation, so what now needs to happen is the mechanism by which non-profits report, so it is around the regulations, the infrastructure needs to be much more accommodating. I would say that for a lot of government registration stuff. If you are going to do it like this then there needs to be a lot of drop downs, online registration and that sort of stuff that make it more palatable."*
- *"It is 2014 legislation, so it is more recent, and we have made some changes. We have made some amendments to address certain requirements. The administration part that deals with*

*local charities is pretty comprehensive. As time goes on, there is always going to be a need to make changes and amendments because the needs of the community change."*

## Understanding the Needs of Bermuda's Community

### *Importance of Understanding Community Needs*

Respondents across all stakeholder groups believed that understanding the needs of Bermuda's community was very important to the success of Bermuda's Third Sector (i.e. all respondents rated it 10 out of 10) (refer to table 6).

*Table 6.* Ratings for the importance of understanding the needs of Bermuda's community to the success of the third sector.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
10 - Very Important	100%	100%	100%	100%	100%	100%
Mean rating out of 10	10	10	10	10	10	10

It was thought that without understanding community needs, the third sector could not address the issues, and would be effectively operating "blind".

### Selected Verbatim Responses:

- *"Understanding the needs of Bermuda's community is exactly what has to happen in order for the third sector to be successful."*
- *"How can you address an issue if you don't understand it? How can you address an issue if you don't understand how important it is to the community?"*
- *"Without an understanding of what the community needs are you do not know what needs to be addressed. You are basically operating blindly."*
- *"You have a lot of people putting in a lot of energy and time. If it is not addressing community need, it is a lot of wasted energy. To be effective, we must understand community needs and operate for the betterment of the community."*
- *"We are operating blind. We need to have a total understanding of our social needs as a country. We are operating from a small group of clients that come forward. We are operating from a feeling and a belief, rather than based on concrete data on the needs of the community."*

### How Well Third Sector Understands Community Needs

Respondents believed that third sector stakeholders had a *fair understanding* of Bermuda's community needs (M = 7.0 / 10) (refer to table 7).

*Table 7.* Ratings out of 10 (10 - Complete understanding, 0 – No understanding at all) for how well respondents believed that the third sector understands the needs of the community.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
10 - Complete understanding	8%	17%	0%	0%	17%	0%
9	0%	0%	0%	0%	0%	0%
8	27%	33%	0%	50%	33%	20%
7	35%	33%	80%	25%	17%	20%
6	15%	0%	20%	25%	0%	40%
5	15%	17%	0%	0%	33%	20%
4	0%	0%	0%	0%	0%	0%
3	0%	0%	0%	0%	0%	0%
2	0%	0%	0%	0%	0%	0%
1	0%	0%	0%	0%	0%	0%
0 - No understanding at all	0%	0%	0%	0%	0%	0%
9 to 10	8%	17%	0%	0%	17%	0%
Mean	7.0	7.5	6.8	7.3	7.2	6.4

Respondents felt there was a lack of available data preventing them from understanding the needs of the community, which meant that they could be creating programs that were not effectively addressing needs. Some felt that organisations were conducting research but the majority felt that data was lacking.

A few respondents felt that there was a good understanding of the needs of the community, but the lack of data prevented them from being able to substantiate beliefs. Some respondents felt that the third sector *thought* they understood the needs, but in actuality they did not.

#### Selected Verbatim Responses:

- “We are doing the work, but we do not have the data to support the need for the work that we are doing. We could guesstimate, and we might be very close, but we would have no supporting evidence.”
- “If you call understanding having the data to back it up. I think it would be 10 if we did not need the data to back it up. I think that we know the issues, but we don't have the data to show what we intuitively know.”
- “There is a lack of organised data in Bermuda in terms of understanding the needs of the community. There is also a lack of data about charitable resources available and the services that they provide. This often leads to duplication of charitable efforts.”
- “I do think that specific entities within the third sector understand their niche but understanding the niche doesn't mean that you understand the community. It means that you understand a need. To get to where they understand the needs it is combining all of these different needs and seeing what the best way is to address them as a collective.”

- *“The first reason is that none of us know yet the full needs of the community. No one has done that research. Secondly, my experience is that there are not enough agencies that compile data in terms of their own services. There are not enough agencies that will implement services based on the data that they get from their constituents in terms of their needs. I think that sometimes people assume needs and then start providing services.”*
- *“I think that there are individuals within the third sector that have a good understanding but I think when you look at the whole third sector, I don’t think that they have an understanding of what the needs are.”*
- *“I do think that there are some non-profits that have been built based on a model of not necessarily meeting a true need in the community, but more of a desired program that they believe will be good, but it is not clear if they are addressing a need or not.”*
- *“I think that the third sector thinks that they understand it, but I don’t think that we do.”*
- *“I think that a lot of the charities that we collaborate or work with do their due diligence and do their research in terms of the services that they provide.”*
- *“A number of them produce annual reports, they have strategic plans, they conduct surveys to determine what their plans are going to be, so to me that says that they have been doing research.”*

### *Types of Information to Assist in Understanding Community Needs*

Respondents were asked what type of information would assist Bermuda's Third Sector with better understanding the needs of the community. Respondents felt that the third sector should be aware of all of the services that were available by different organisations and how many clients were receiving the services. This would help to avoid duplication of services and provide more efficient services.

A comprehensive tool with socio-economic data that could be used to identify root causes and create plans to address the needs across the community was mentioned as a requirement. This tool would collate information on key drivers of health and wellness like poverty, hunger, and joblessness.

Census data provided by the Government and collected every 2 to 5 years with a separate section on social services would be necessary. However, there would also be value in focus groups and face to face meetings with stakeholders and the community to really understand the issues that people faced.

It would be important to ask the community what their needs were, rather than the third sector assuming they knew. It would also be important to ask questions in an unbiased way.

#### **Selected Verbatim Responses:**

- *"We need to understand the services of each participant in the third sector community. We need to understand what each entity provides. I think that it would make our efforts more efficient in the sense that our efforts would all go towards the same goal. Each strength would be able to be utilized to assist the person more efficiently."*
- *"There also needs to be more data on the non-profit resources available, the services that they offer to avoid duplication of services. Government needs to play a role in providing this information."*
- *"If they had a lot of data related to social issues, mental health and about a lot of the challenges that people are facing like job issues they would have a better understanding of the community needs."*
- *"Collective numbers around the number of clients requiring different services, number of clients that have needs that aren't being met, so I'm thinking housing, food, mental health etc. Knowing what the needs are and to what extent they are being met. Numbers at a national level not just from one organisation."*
- *"Asking the community. Asking people what they need, how they need it and don't just ask the obvious people. I may be an alcoholic, but nobody may know, because I may be a functioning alcoholic."*
- *"We ask our questions, we ask the questions that we want answers to, as opposed to having the community tell us. And I think that is where we falter. There needs to be some sort of uniformity about how they tell us. It is about asking the right questions so that they are opening up so that they can tell us what they need versus us assume what they need and asking the wrong questions. I feel that lately some of what has come out of the third sector from our side of it is that we are telling Bermuda here are the issues, which is more based on what we see, and what we think and understand, it may not correlate to what is actually going on."*
- *"There is no comprehensive tool that represents a baseline survey level analysis of what is. A fact-based assessment of the wellness of the community. Bermuda Community Foundation has the Vital Signs report, which was very helpful, but there has to be a systemic level tool. At the end of the day it is a centralized resource that captures needs from the group up that seeks to create an understanding through data of a wide range of people across the community on agreed definitions of things like poverty, hunger, joblessness, all the key drivers of health and wellness in a community. You will then have the needs and the next steps will be to determine the most effective interventions to deal with those needs, and that get to the root causes of the problem and eliminates that problem for that individual. The best*

*thing for the third sector is to make itself self-redundant, that should be the aim of the third sector."*

- *"Government census, more accurate and up to date information. At least every 3 years, but I am leaning towards every 2 years on education, housing, standard of living."*
- *"We need an island-wide government census every 5 years of our social sector needs through perhaps conducting telephone surveys. There should be 2 separate census projects. There should be the general population census and a specific census of our social sector needs."*
- *"Data, regular updated statistics that are provided by the Government as opposed to the third sector or private sector having to contract it out. It needs to be more frequent, with more depth and more resources to be able to do that. I would like to see the level of data that is provided like elsewhere like the US or the UK. There should be a big map available from a data point of view. More demographic data, so more broken-down data based on income levels, based on education levels, with more frequency. There needs to be data aligned with the abilities of a population, from physical disability, to cognitive disability all the way through to medical disabilities. I think we have a lot of data on medical, but I do not think that we have a lot of data on cognitive and behavioural disabilities and I think that we need to have more information with regard to that. I think it is really important to have demographic data such as race, age, income levels, education levels, assets and home ownership, because I think that information is important to show where the gaps are."*
- *"You need skilled organisations conducting effective research studies. However, this research cannot substitute sitting down with those in need and charitable organisations to get more of an in depth understanding of their needs and the issues they face. Organisations should also conduct independent research to understand the challenges facing their particular communities and this information should be used to justify needs for funding and it should be shared with the broader third sector."*

### *Who Should be Responsible for Providing Information*

When asked who should be responsible for providing this information and keeping it up to date, the majority of respondents thought that Government should be responsible or play a major role in providing the information. Respondents believed that this could be a collaborative effort with non-profits, the private sector and Government working together.

Some respondents felt that each non-profit should be responsible for collecting their own data and ideally sharing that data. Others felt that organisations such as the Bermuda Community Foundation, Agency for Children and Families or Charities Commission should be the information resource.

### *Selected Verbatim Responses:*

- *"I think that it should be a partnership. I think the Inter Agency for Children and Families could partner with the Government to gather the data, keep it updated annually. The third relationship in that would be the charities and the affected population."*
- *"This can be a collaborative initiative. The Bermuda Community Foundation exists to be an information resource for Bermuda so they can play a role. Government could also play a role from either one of the social services departments. It could also be possible to involve the private sector. It could be a collaboration between several parties to gather this information for public use."*
- *"This will need funding. It should be a collaborative approach involving the Government and private sector for conducting a larger scale evaluation into the needs of the community. Individual organisations should make an effort to collect data that speaks to the needs of their stakeholders."*
- *"The Government drives the census and they have data, so I hope that they would partner and share that information. And having the third sector organisations going out and getting their own data as well. The trick is how do you get it all into one place, so that you can benefit from someone else's research instead of having to do it again. You can argue that it should*

*be one organisation that does all of the research but every organisation is going to have their own take on that little piece of data. It is to avoid overlap and to coordinate."*

- *"I believe the Bermuda Government did the Mincy report. I would say the Centennial Bermuda Foundation in terms of funding would probably want to conduct a study like that. Maybe funders or maybe a combination of all three."*
- *"The Bermuda Government should be responsible for conducting an island-wide census. When they moved to the phone census, they eliminated at least 16 questions which were providing us with some good data on the social service needs of the island."*
- *"The Government should be responsible."*
- *If there was an entity in the Government that really looked at the community as a whole and what the challenges are and they pulled the data from the various government departments and agencies so that there is one place that is distributing the information to the third sector. It is information that is current and relevant to what is happening in the community."*
- *"It has to be internalized because you have to be assessing it internally. And it has to be an ongoing element of your practice."*
- *"Organisations, I think that it should be us. It needs to start with you because no one tells your story better than you do. Organisations should be responsible for enhancing their marketing."*

### *Best Way to Share Information*

When asked what the best way would be to share this information with Bermuda's Third Sector, most respondents thought a virtual method would be best such as a shared database or interactive website that the third sector could reference and contribute to. Reports or newsletters sent on a regular basis (monthly or quarterly) by email was also a good way to share information. Others felt a combination of virtual and in-person sharing methods were a good mix. In-person could include presentations via Zoom.

It would be important for the information to be simple and easy to interpret and someone should be available to provide assistance when required.

The information should also be easily accessible.

#### Selected Verbatim Responses:

- *"Have a large, shared database where the third sector can share available data to understand what the community needs are. Third sector stakeholders can contribute to this database as well as Government, and summary papers can be written or commissioned if necessary, to create a picture of the needs of the community."*
- *"A centralized data gathering on a regular basis of the needs across the island. Utilize the data from each agency by virtue of setting a template for each agency to use to submit their data to a centralized location that is analysed annually and feeding that information back to charities."*
- *"A well-organised shared website with organisation by different charitable sectors. Quarterly meetings with the Third Sector to communicate this data and the needs of the community."*
- *"Send out a report and then hold several discussions with the third sector so that you can obtain feedback and you can make sure that you really understand what you have read."*
- *"This will need more collaboration. Studies conducted should be shared with all areas of the third sector. Reports could be distributed and presentation led by professionals to allow stakeholders to answer questions and to determine how they can best use results to drive their efforts."*
- *"You are going to have to make the information simple and easy to understand because you are going to have people from all skill levels looking at it and interpreting it. Take technical data and turn it into something that can be broadly understood by the different organisations that you are trying to work with."*
- *"Electronically so that everybody has access. Information on a screen is only as good as you interpret it and understand it, so there has to be someone who can translate what we are looking at. There has to be a physical person or entity that will assist anybody who needs it."*
- *"Make it easy. For example, you have a Charities Commission and you want to get financials and they want to charge you \$20 each time, and it takes you a day to get a single PDF which is wrong. Make the information easier and accessible."*

### *Importance of an Equity and Social Justice Approach*

Respondents were asked about their opinions on the importance of an equity and social justice approach to understanding the needs of Bermuda's community.

*"An equity and social justice approach aims to understand the conditions in society that lead to disparities in the community based on demographic factors such as race, social class and gender. Using a scale of 0 to 10, where 10 is "Very important" and 0 is "Not at all important", how important is an equity and social justice approach to understanding the needs of Bermuda's community?"*

Almost all respondents believed that an equity and social justice approach was *very important* for understanding the needs of the community (M – 9.7 / 10, refer to table 8).

*Table 8.* Ratings out of 10 (10 – very important, 0 – Not at all important) for whether an equity and social just approach was important for understanding the needs of the community.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
10 - Very important	77%	100%	80%	25%	83%	80%
9	15%	0%	20%	50%	17%	0%
8	4%	0%	0%	0%	0%	20%
7	4%	0%	0%	25%	0%	0%
6	0%	0%	0%	0%	0%	0%
5	0%	0%	0%	0%	0%	0%
4	0%	0%	0%	0%	0%	0%
3	0%	0%	0%	0%	0%	0%
2	0%	0%	0%	0%	0%	0%
1	0%	0%	0%	0%	0%	0%
0 - Not at all Important	0%	0%	0%	0%	0%	0%
9 to 10	92%	100%	100%	75%	100%	80%
Mean out of 10	9.7	10.0	9.8	8.8	9.8	9.6

Respondents believed that an equity and social justice approach was important to understanding the needs of Bermuda's community because many social issues the third sector was addressing stemmed from a lack of equity. Social justice was thought to be about understanding the root causes of why the needs existed. It would be important to "level the playing field" when providing services, and to ensure services were being allocated to the greatest need.

#### Selected Verbatim Responses:

- *"Because so much of the challenge that we face is related to social justice equity. Understanding the social justice aspects of the country becomes vitally important for how we address a lot of the issues that people perceive to be the cause of their lack of understanding, lack of success and lack of involvement in a positive way in the community."*
- *"It feels like the conditions in society are rooted in equity and the lack of social justice and classism, therefore the standing of those disparities could fix a lot of issues by virtue of getting to the root cause and advocating for these things to be reversed."*

- *"For some charities it is helpful to understand the societal conditions such as the effects of systemic racism that have led to a lack of equal opportunity (especially education) for groups such as black males in Bermuda."*
- *"You want to make sure that the programs are supporting those who would not otherwise have access to services. You want to ensure that well-being is being pursued across the community and from a communications perspective there are implications around how you label things. You want to make sure that you are targeting services in a way that will help level the playing field."*
- *"At the intersection of race, gender and social class is where society finds the most meaningful needs of the population. And I am not convinced that donor support or resource support has been allocated based on those intersections."*
- *"It is understanding root cause. If you do not get to the root cause, it is just band-aids that you are putting on."*
- *"There is a big difference between equal and equitable, and we can provide equal support and it doesn't make it equitable and it will not tackle the issues that we have."*
- *"The needs of the community are huge. Our social services are dealing with a very specific group of people, this necessarily does not reflect need. The reality is that whites have money to bypass the local system. That piece is huge in understanding the need. This is very specific in the collection of data for the third sector. We need to understand who the disenfranchised groups are, and their prevalence and determine the best way to meet their needs."*
- *"We have the historical imprint to push through and then we have some current statuses that could also be challenged such as moving through people's perception of sexuality that is denying people access to jobs or that excludes them from church groups. I feel that a driving element to all of that is education and finding creative solutions to education."*
- *"You need to understand the systems and factors that result in people occupying certain places in society. One example which is important to me is the issue of financial literacy especially as it relates to the black community in Bermuda. Historically, we were disconnected from those financial systems. So, we do not naturally have an understanding of wealth or money management. I think you have to have an understanding of whether it is historical or current situational to understand how people ended up where they are. If you don't understand the how then how can you address the specific needs or best strategy to move people in the right direction."*

### *Impact of an Equity and Social Justice Approach on Third Sector*

When asked what impact an equity and social justice approach should have on how third sector stakeholders operate, respondents felt that this would impact donors and non-profits. Donors may choose to allocate funds to organisations that could show they were operating from an equity and social justice approach. For non-profits, an equity and social justice approach should provide guidance for how an organisation should operate. Non-profits should ensure that equity and social justice was being considered in their approach to both determining community needs and service delivery.

#### Selected Verbatim Responses:

- *“Guiding the organisations to ensure that they have the resources to fairly assess and do their work.”*
- *“It’s asking the question internally and to external stakeholders ‘what are you doing as part of your program and service delivery that speaks to equity and social justice? How do you demonstrate that you are doing that? How are you helping fill the gaps for those who ‘have not’ due to historical disadvantages?’ This could be a question in grant applications going forward. How do you think you are meeting this particular aim in our country?”*
- *“This should play a role in how donors conduct themselves. Ensure that they provide funding for all organisations regardless of their socioeconomic backgrounds. This should also play a role in terms of how non-profit sector employees are hired.”*
- *“It may impact their target audience from a donor perspective. It may also impact how donors choose to fund. From a charity perspective, it should have a huge impact on how they identify target groups and how they make effective plans to work with and help those groups.”*
- *“I think that agencies should have to make a case for how they are contributing and addressing equity and social justice issues. So, a justification for existing. Even at a Charities Commission level you should have to show that you are providing a public good.”*
- *“It should have a massive impact because that is going to show where the needs are in society and then what they need to provide to help the people and groups that need it as opposed to assuming they know or just providing the traditional services that they have always provided without understanding how things have changed.”*
- *“It should really inform the way that they operate, it should be the basis. They should be able to identify who needs the services the most, and once you have done that exercise of identifying who needs them, then that should inform how the third sector spends its resources to effectively help those people.”*
- *“It is similar to recognizing that there are a lot of Bermudians walking around with unaddressed trauma. In order to be sensitive to it, charities and organisations need to operate with a trauma informed lens. There needs to be much more training, education and awareness about the equity and social justice approach and not from how it has been and not just from the race issue. There is a full-on scope that is about race, gender, etc. I think the social class piece is the most challenging because I think that classism, black or white you put yourself in a certain position once you reach a certain position and unfortunately you do the colonial thing which is about the classism and the classism sense in Bermuda has caused a lot of problems.”*

### Project Collaboration Toward a Shared Goal

#### *Awareness of Collaborative Efforts*

Respondents were asked if they were aware of any successful third sector collaborative project efforts in Bermuda. The COVID-19 Coordinated Crisis Response Effort (CCRE) was cited most often as an example.

Some of the specific organisations mentioned as being involved in collaborative efforts included Ignite, Women's Resource Centre, The Family Centre (mental health panel during COVID-19), Youth Development Zone (spearheaded by The Family Centre), Anglican Church, Non-profit Alliance of Bermuda, Grateful Bread and Age Concern.

#### *Selected Verbatim Responses:*

- *"We had an excellent example of this during the shelter in place because some of the third sector took a huge burden off of some of the social agencies that were already stretched to the limit and that allowed the Government to effectively work with the people and needs that they were addressing. The third sector took care of a lot of the challenges that came up along the way that made life a lot easier."*
- *"There is some collaboration on the shelters where a number of agencies come together to support the running of the shelter during a hurricane. During COVID-19 there was the third sector EMO group that helped to collaborate the distribution of meals and food bags to the different areas of the island over different days."*
- *"There was a very good collaboration with Ignite. Ignite put together a group of programs that were helpful. There was one aspect of it that supported the [organisation] in helping to support people who did not have the funds. And at the same time, Ignite recognized that a lot of people couldn't get out to get the medicine, so they provided a free delivery service. It was a great collaboration and I think they have done the same thing with meals."*
- *"The Women's Resource Centre has been working with a number of agencies to help with housing for single families. They are coming up with ideas and plans to push the service out and they are actually doing a good job. They have good financial backing that other organisations may not have. They are collaborating with agencies like ours to see what our licensing agreements are like, what our policies are and things like that. They are working with many groups like the Centre Against Abuse, the churches, police, etc. It is definitely a collaborative effort."*
- *"The Youth Development Zone collaboration was spearheaded by The Family Centre to get organisations that work with young adults and youth to work to an aim of improving the outcomes for youth. It was mainly third sector but this is the reason why private, non-private and Government is important because the people who continue to sit around the table in collaboration are government entities, charities, as well as the private sector and individuals. It has been very successful and it is leading to the development of an organisation to work with young black males particularly."*
- *"The Anglican Church has a number of very good examples with meals being provided. Since the spring they have done it with a number of churches. It has grown into a very large collaboration with an impressive outreach program. Grateful Bread is another collaboration between stakeholders, it is Docksidiers Restaurant who provide the food, and other people provide the restaurants. They put on a spread once a week for people who don't have food, so that is a great example of collaboration."*
- *"Yes, we currently facilitate the Non-profit Alliance of Bermuda which is working on an advocacy and awareness campaign. We are about to launch a youth development community which is about organisations coming together to talk about best practice and learn from one another. A group of CHIP service providers just came together on a task and there is a lot of potential for where that can grow. And I think of the Third Sector Coordinated Response as an*

example of coordination. There is also the non-profit division of the Chamber which is in collaboration around advocacy priorities for non-profits.”

- “I love the Age Concern project. We have partnered with Age Concern. We asked them what issues they were trying to tackle. They were trying to improve single point access to medical help for seniors. We pulled together government medical practitioners, we pulled together island wide practitioners who all volunteered their time and effort, and we volunteered our building and staff and we pulled it off 3 or 4 years in a row, 8 to 10 hours a day where we helped Age Concern get in 100 plus seniors who all attended one space where they could see a medical practitioner free of charge. Those are the collaborative projects that we need. When the Premier said ‘anybody who can help get youth jobs’ we weren’t in the office but we still got 33 kids and connected them to 25 non-profits. Those kids were nominated by Government, the College and by Knowledge Quest. We brought together all of the entities and said here is the problem, lets tackle it and get it done.”
- “There are a number of charities that specifically do fundraising, and then that fundraising is used to support other charities. For instance, there are a number of charities that actually support organisations such as Meals on Wheels and try to help them in their efforts.”

### Should Collaborative Efforts be Encouraged

All respondents believed that collaborative project efforts should be encouraged among Bermuda’s Third Sector (refer to table 9).

Table 9. Whether collaborative project efforts should be encouraged.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
Yes	100%	100%	100%	100%	100%	100%
No	0%	0%	0%	0%	0%	0%

Respondents felt that collaboration reduced duplication of efforts, provided more effective utilisation of resources, and led to better ideas and better service to the community. Organisations could work together to enrich their programs and ensure people were receiving appropriate services.

Some respondent felt that collaboration could be difficult because charities were competing for the same funding, and they were not necessarily equal in their level of experience and standards of service. This could lead to a learning curve for some organisations to learn how to collaborate effectively. A concern was that in some cases collaboration could take more time than just having one organisation execute and provide the services.

### Selected Verbatim Responses:

- “Yes, because it enriches your program and you are not duplicating work. You are able to do more because you are collaborating and sharing the workload. When you collaborate on research you are saving yourself time. You also have the ability to meet more in the community if you have two different groups with databases of participants and stuff.”
- “You may think that you are the only organisation working on something and then you realize that other people are doing the same thing. You are able to work together and get the message out to your clients that there are other agencies that can assist if you are unable to. It encourages communication between various organisations.”
- “Yes. The pool of resources has been shrinking, and it would make the effectiveness of the work that the charity is doing greater. They could come together and stop duplicating efforts. A number of the recipients of these service providers receive help or assistance from multiple

charities, so this way they could get a wraparound service. That would help with double dipping too. You have people going to multiple charities for the same services. If there were more of a collaborative effort, they could identify which beneficiaries have not been able to take advantage of certain services.”

- “Until we remove the silos around non-profit organisations, we will not be sure that we are filling gaps. We will not be able to ensure that we are providing a common message. For example, we have dozens of youth organisations and they each have their own mantra. If we could collaborate around youth organisations with specific goals in mind that are based on need, youth organisations could work together to fulfil those needs. We could work together to build particular youth skills and then we would have a greater impact on youth behavioural change.”
- “Yes. Collaboration creates more synergy in the third sector and can prevent duplication and lead to greater societal impact.”
- “Collaboration is good because when you bring together people who have similar goals together, they bring more diverse ideas to the table and better ways of completing tasks which allows you to do things better. Having more manpower working toward the same effort also leads to a greater impact.”
- “I think that if we have the right mix and understanding of funding mechanisms and infrastructure, it can be very powerful, but I think that as long as there is competitiveness for funds and with limited funds I think that it will fail.”
- “I think that it should be an option, but I wouldn’t necessarily say that it should be encouraged above all other types of actions. I think that if it makes sense to leverage resources in a more efficient way then collaboration could work, but in order to collaborate you have to have all the players on the same level playing field. I think that sometimes it takes a lot more time and effort to get to a point where everybody agrees and understands than to go ahead and just execute. So I think that you have to factor in time, availability of resources with regard to having people understand what collaboration means, what is the actual impact of the collaboration and how you can quantify the outcome or impact of that compared to if you had organisations just execute that. I think that the vast majority of people create charities because they see and recognize a need.”
- “Absolutely, especially in a small community like this. In an ideal world, you absolutely want people to collaborate, but in the third sector you have people who are operating at higher standards than others and have more structure with their donors and don’t necessarily feel like they want to collaborate. I think that it depends on what you are collaborating about, you don’t want to have to increase someone’s lower standards in order to collaborate with them.”

### *Most Important Results of Collaborative Efforts*

When asked what the most important results were that collaborative efforts should aim to achieve, respondents cited improving the lives of the people of Bermuda and having greater societal impact as a result of increased resources. Working collaboratively could also lead to a more holistic approach to ensuring that all needs are addressed.

#### *Selected Verbatim Responses:*

- *“The ultimate goal is to improve the lives of the people in the country.”*
- *“The betterment or improvement of the country as a whole.”*
- *“Greater societal impact than the effort of a single entity that addresses a genuine community need.”*
- *“Greater societal impact and better use of donor funds. Ultimately making a bigger dent in addressing the needs of the community.”*
- *“People for similar disciplines working together toward shared goals to effect change. The aim should be to have a greater impact on helping a particular group in need.”*
- *“Addressing a need in society or solving a problem. And because when people are collaborating there are more hands, it only means that the impact can be greater. Bringing diverse ideas to the table and working together can also lead to a more holistic approach which can have a greater impact in addressing a societal need.”*
- *“For example, there is a 20-year-old with 3 children and no job, who does she go to, who does she collaborate with. Teen Services needs to collaborate, Workforce Development and Social services. You have various areas that the girl needs help with and we need to share our resources to help her meet all of her needs. There needs to be a higher-level integrated plan to help her. It is important that agencies do not let people in need fall through the cracks. When collaboration occurs, it is important to ensure that visions align. Even though collaboration should be a shared goal you need to respect that those who have visions need to fulfil those visions as well.”*

### *How Best to Collaborate to Achieve Results*

Respondents were asked how Bermuda's Third Sector could best collaborate to achieve results. Understanding each organisation's function and what they seek to achieve, ensuring similar objectives, and having open and effective communication would be important factors in how organisations collaborate.

Clear structures and objectives need to be in place to guide collaborative efforts. Structures and objectives should outline the goals of the collaboration, who will be responsible for achieving each goal, the timeline for achieving goals, and how funds will be allocated to the organisations collaborating. One respondent suggested the Collective Impact model as a successful model that could be followed (refer figure 4) (Cancialosi, 2015).

#### **Achieving Large-Scale Change through Collective Impact Involves 5 Key Conditions for Shared Success**

<b>Common Agenda</b>	All participants have a <b>shared vision for change</b> including a common understanding of the problem and a joint approach to solving it through agreed upon actions
<b>Shared Measurement</b>	<b>Collecting data and measuring results consistently</b> across all participants ensures efforts remain aligned and participants hold each other accountable
<b>Mutually Reinforcing Activities</b>	Participant activities must be <b>differentiated while still being coordinated</b> through a mutually reinforcing plan of action
<b>Continuous Communication</b>	<b>Consistent and open communication</b> is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation
<b>Backbone Support</b>	Creating and managing collective impact requires a separate organization(s) with staff and a specific set of skills to <b>serve as the backbone for the entire initiative and coordinate participating organizations and agencies</b>

*Figure 4. Summary of 5 key elements of the Collective Impact Model*

### Selected Verbatim Responses:

- *“Understanding what we have to offer, knowing what each person brings to the table. Does this make sense in terms of the impact that we want to achieve? Making sure that your values as an organisation are aligned in moving forward. Each of you should bring something unique to the table.”*
- *“Everyone needs to be clear about what each charity does, so what is their function, who do they serve, what type of charity are they (sport, health, conservation). Sometimes those charities that you would not see at first as being a focus for something like a health charity, it could be the garden club because they grow vegetables with children, so there is an opportunity to work together. A lot of the charities can potentially have crossovers if you know exactly what they do and how they function.”*
- *“There needs to be concrete structures in place to enable successful collaboration guided by the donor. These structures need to successfully outline what the goals of collaboration will be, who will be responsible for addressing key aspects of each goal, and how this relates to the funding received.”*
- *“When there are specific objectives for collaboration and the best practice structure is used to guide how the collaboration is rolled out.”*
- *“There are really good examples around what collective work looks like and how you organise and frame that. I am all for following a model. And if we want to customize that model to better fit Bermuda’s culture that is a good way of doing it. One successful model is the Collective Impact Model.”*
- *“They need to be willing to share and to be open to the idea of collaborating. There needs to be clarity on who will be responsible for what and there needs to be a shared vision for collaboration.”*
- *“We need similar objectives, and I think that is where the communication piece comes in, because if we all understand what the needs are, and we understand what each other’s strengths are, then we will be able to better collaborate. We need to really embrace what we are doing.”*
- *“It is going to take open communication and people not being so strict about what they do. I am an educator by trade, and if I know a way that kids can learn to divide that is super easy, I want to be able to share it. If we have a strategy over here that works well then maybe you can use it too.”*

## *How to Encourage More Collaboration*

When asked what could be done to encourage more collaborative efforts, respondents reiterated that effectively communicating the objectives of the collaboration and what each organisation was responsible for would be key.

Another suggestion was for donors to require charities to confirm they had reached out to existing charities to see where they could collaborate before funding would be considered.

### **Selected Verbatim Responses:**

- *“First of all there has to be a framework that is put up that everybody can agree to. That is the most important thing. They all buy into a framework, they all agree and contribute towards the framework and it is publicized so that the public knows what this looks like so that they can decide how and who they contribute to in time and in goods.”*
- *“That can be challenging because I know of several groups of people who use to work together but then due to a disagreement, they went off to work on their own. A lot of the disagreement comes from wanting to be in control of a project that you are passionate about. For collaboration to work, there needs to be clear objectives and assignment of project roles. I think a good start to encouraging people to collaborate is to bring people together with similar goals and have them sit around the table to discuss how they can work together to bring about greater societal impact.”*
- *“Organising regular meetings for people to engage in and come up with different ways that they can collaborate. Encouraging the conversation.”*
- *“Having incentives from funding organisations for collaborating. Training to make non-profits see the benefits of collaboration. Encouraging them to be open to sharing ideas without feeling like other organisations will steal and run with their ideas. Less competition and more collaboration.”*
- *“Making it easier. Effective communication and understanding what each person is doing.”*
- *“You show impact and action and from there people will be more willing to participate. If you are someone that is facilitating that, you are able to show that it works.”*
- *“Government could say that we are not going to offer you grants until you tell us how you are all going to work together. I know our charity commissioners ask when people put in an application for a new charity if they have already touched base with existing charitable organisations who are providing similar services. Also, if the donors were to ask that question before giving out funds. We suggest requiring them to, because if you don’t ask, they aren’t going to if they don’t have to. It is also putting the responsibility on charities that do have active status to know that part of their responsibility is to help other groups who may want to provide the same service.”*
- *“If we are asked about it in our grant applications then you know that is what people want to see as well. Maybe do an RG article where you have multiple non-profits standing together saying that we worked on this together and it was a success.”*
- *“I think that if donor organisations demanded that charities better justify their needs for funding and encouraged them to create proposals that provided comprehensive solutions for addressing societal needs using all possible resources, more collaboration would naturally occur.”*

### *Important Considerations or Barriers to Collaboration*

Respondents were asked to name important considerations (or barriers) for ensuring that any collaborative efforts would be a success.

Competition over funding was recognized as a barrier to collaboration. Organisations were used to competing and would need to see the value to their organisation, not just to the people in need. Respondents identified that ego could play a part in organisations wanting to keep themselves separate. They had worked hard to establish their charity and did not want to share that work with others. They also did not want to tarnish their brand by identifying with another organisation that may not have the same high standards.

To ensure effective collaboration, there would have to be mutually beneficial outcomes for all parties, a clearly defined structure and agreement on the objectives. The structure would need leadership to drive results, with each organisation understanding what they were responsible for and what outcomes they needed to achieve. Agreement on the objectives could be difficult, but organisations would have to be willing to listen and be open minded to other points of view.

#### Selected Verbatim Responses:

- *"Both parties need to be able to benefit from the collaboration and not have one feel that they are being used. They both need to be able to benefit from working together."*
- *"The biggest barrier right now is that people create silos because they think that they may lose funding but if we are working collaboratively the funding source will get to see the bigger picture."*
- *"Candour, transparency, honesty, integrity, ego. And the charities do feel competition with their donor base, which would be a barrier to collaboration. I think that donors need to understand the actual needs of the charities more. Most donors give on an annual basis, and most charities spend half of the year sweating how to raise the funds for the next six months of programs. If donors understood charitable funding needs, and how they support their goals, they would fund in a way that provides sustainability for the duration of a project which would mean that charities would not have to utilize resources mid-way for forward-thinking fundraising."*
- *"We need to have a shared vision, and we need to know who is offering all of those things that we need to join together. You need to look at an organisation's goals and what they are doing within those goals and it is important that the relationships are mutually beneficial. Organisations do not participate in shared collaboration frequently because they are busy seeking funding and then competing happens."*
- *"I walk in and I think I know the answer and I am not willing to let the other parties in the room explain to me what they believe the issues and answers might be. It is pointless. A barrier could be being open to listening to the other people in the room. I have been in the room before where a person thought that someone stole their idea and would not even consider collaboration."*
- *"I would say that the biggest hindrance is ego. You may find that there are a lot of people who aren't willing to collaborate with others because in their eyes their respective charities are their babies, and they don't want to share what they are doing with others."*
- *"I would say that it could negatively impact branding. For example, [Organisation x] has a brand and people expect excellence from this organisation, so if another organisation wants to establish themselves as offering these types of services, and if they are not up to the standard then the [organisation] will say no we can't collaborate with them because it could tarnish our brand."*
- *"In authentic collaboration you need to have clear goals and objectives, and an understanding of who is going to be responsible for what."*
- *"It has to be results-driven, you have to achieve results, and if you don't it is seriously going to undermine the collaboration. When you do collaborate, you have to be very clear about who is leading, who is planning, who is delivering and what are the desirables. You have to have all of that aligned and sorted, otherwise it will not work."*

- *“You must have a shared goal, shared agreement on outcomes and a shared agreement on roles.”*
- *“Ensuring that you have aligned values and an agreement on expectations of who does what and you have to agree on the outcome of the collaboration. Also need to agree on the allocation of resources.”*
- *“Effective communication between collaborating parties and conflict resolution strategies and clear goals that each party is responsible for achieving.”*

## Third Sector Networking

As shown in table 10, just over 7 in 10 respondents were aware of successful non-profit networking organisations.

Table 10. Awareness of successful non-profit networking organisations.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
Yes	73%	50%	100%	75%	83%	60%
No	27%	50%	0%	25%	17%	40%

When asked to recall successful non-profit networking organisations, The Centre on Philanthropy was mentioned most often. The IAC, Centennial Bermuda Foundation (formerly Bank of Bermuda Foundation), Bermuda Community Foundation, Association of Fundraising Professionals, The Family Centre, The Women's Resource Centre, and the charitable division of the Chamber of Commerce were also mentioned.

### Selected Verbatim Responses:

- *"Centre on Philanthropy. I think this was a success and its closure has definitely left a void in the non-profit sector in Bermuda."*
- *"The Family Centre, The Women's Resource Centre, Housing for Families. The inter-agency groups offer so many workshops for all areas of the community."*
- *"The third sector division of the Chamber of Commerce has just gained some momentum."*
- *"Through my work, we have brought together different groups of individuals from different organisations. For example, at one point we brought together all of the feeding programs, environmental organisations as well as special needs providers. These networking opportunities allowed them to hear about what each organisation was doing and their challenges. The most successful was probably the special needs group. They were able to create a policy around how they could operate as a collective, and they were able to create shared funding goals which they were able to go to donors with. They were also able to petition the Government around legislative changes that were needed so that they could operate more efficiently. This was an example of how networking could strengthen one area of service provision."*
- *"Bermuda Community Foundation. I know they have more of a financial aspect to the way that they manage that pool. That is one that has been successful. The Bank of Bermuda Foundation to some extent. Bermuda Education Network although I am not sure how successful they are."*
- *"The Centre on Philanthropy was successful in both networking and providing support. I know that the Centennial Bermuda Foundation has been having coffee and chats with what they see as similar organisations within certain sectors. The Chamber of Commerce has been trying to create a non-profit division. The IAC has a networking arm with health and human service."*
- *"Centre on Philanthropy, Chamber might have a charitable wing."*
- *"Centre on Philanthropy was one."*

### *Whether Bermuda Should Have a Non-Profit Networking Organisation*

Just over 7 in 10 respondents (73%) believed that Bermuda should have a non-profit networking organisation. One respondent felt that Bermuda should not have a non-profit networking organisation, and 23% held other opinions (shown below) about the need for a networking organisation (refer to table 11).

Other opinions included:

- Organisations need to network but I am not sure that we need a dedicated networking organisation
- Yes, but we already have organisations that can perform the function of networking, so we may not have to create a new one
- This is a "nice to have" but not a priority

*Table 11.* Whether respondents believed Bermuda should have a non-profit networking organisation.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
Yes	73%	67%	80%	50%	100%	60%
No	4%	0%	0%	25%	0%	0%
Yes, maybe (Explain why)	23%	33%	20%	25%	0%	40%

Respondents who supported the creation of a non-profit networking organisation believed that it could be a useful for keeping the third sector informed about who the different organisations within the third sector are, along with their roles and functions. They stated that bringing these organisations together could promote collaboration, training, and advocacy. To be successful, it was believed that the organisation would need to have clear objectives and outcomes.

Those not in favour of a dedicated networking organisation felt that networking was already occurring through the efforts of other organisations, and that for it to be viable the organisations mandate would have to go beyond providing networking opportunities by providing other beneficial functions such as training and education.

Selected Verbatim Responses (Reasons in favour of a networking organisation):

- *"Yes because it will help to encourage collaboration and help to keep non-profits abreast of the efforts of other organisations. It can also help them to establish and discuss community needs."*
- *"Yes. It is a way of understanding who is in the sector and learning about the work that they do. A networking opportunity could spark a conversation around whether different entities can work together. A networking opportunity might be a less threatening way to foster collaboration. Through coming together say monthly and talking about what we are working on it might naturally lead to groups of people deciding that it might be beneficial for them to work together."*
- *"Yes. There has to be some central force for that collaborative piece. The Centre on Philanthropy closed down as a result of a lack of funding, not a lack of need."*
- *"Yes. Because you need that governing body that holds it all together. We all work in our own silos because we all have our own objectives and goals. That group, whether it is non-profit or not needs to pull it all together and keep reminding us that this is important work."*
- *"Yes. Capacity building should be the wide mandate and within that evidence-based practices around training, advocacy, and collaboration. With training, you want to increase the use of evidenced-based best practices. Advocacy around policy training and collaboration builds capacity. And I think that there needs to be a research function where one entity can drive sector wide research and data collection."*
- *"One of the closest things to that would be the Centre for Philanthropy and one has to ask themselves why that failed because we do spend a lot of time in meetings and not driving outcomes. I think that there has to be a real call to action. When they come together there has to be some kind of shared accountability for outcomes. We bring a lot of people together in Bermuda under different banners, it is the action-ability and accountability of the outcomes that is often lacking. For example, there are things that are similar for executive directors of philanthropies, so having a forum that somebody would be able to walk in and say I don't know what to do here, I am stuck can you help me, in a very authentic, high integrity way would be a powerful thing for a lot of folks who feel very alone in these organisations. We tried to bring people together with Bermuda First and it was painful."*
- *"Yes. It would make efforts to collaborate easier if you are able to sit in a neutral space."*
- *"Yes but that organisation needs to have clear and useful goals."*
- *"Yes. I like where people can express themselves and get support because it is tough going after funds and being turned down. It would also be good for holding each other accountable."*

Selected Verbatim Responses (Reasons opposed to a networking organisation):

- *"I don't think they need one by itself. I think that there are a lot of organisations that do that as a component of what they do."*
- *"I'm not a huge fan of this especially if it is only about networking. Training and education opportunities would need to be included for this to be viable."*

## Goals of A Third Sector Networking Organisation

Respondents felt that the goals and core activities of a non-profit networking organisation should be to bring the third sector together to promote an awareness of the different organisations operating within each division of the sector. Respondents felt that the networking organisation should collect and share data for understanding community needs and establish plans for how the sector can best collaborate to meet those needs. It was believed that this approach would create more efficiency in the use of third sector resources, and lead to a greater impact on meeting community needs. Training, advocacy, sharing ideas, discussing solutions and the collection of key data to be able to measure the impact of the work of the third sector were mentioned as key goals of a non-profit networking organisation.

### Selected Verbatim Responses:

- *"To provide direction, support and advocacy for the third sector and to make decisions as a collective."*
- *"A one stop shop for Bermuda's non-profit sector. Resources are for training, advocacy and for grouping individuals together from similar disciplines so that they can work toward shared goals."*
- *"Creating awareness of what is going on in the sector. Opportunities available in the sector and what different people are doing. It can also be an opportunity to facilitate training. For example, if there is a specific way that the Charities Act wants charities to operate, training can occur to ensure everyone is operating on the same page. Overall, a networking organisation could be a hub that could be used for information sharing, training, and capacity building. I think it could be powerful."*
- *"Leadership development, data collection, advocacy, training, and education. This entity needs to be responsible for organising all necessary training and education and should play a role in evaluating the sector and the activities of non-profit organisations."*
- *"Making sure that organisations and members of the group are convening and talking. That they are maintaining a certain standard, this includes keeping your financials up to date and all of that type of stuff."*
- *"Understanding the needs of the community: I don't think that you can effectively do anything for the community until you have good networks in the community. You need to understand what they need and what they would like, so it has to be evidence based."*
- *"To measure and identify the need, to understand the skills that the third sector entities bring to the table, and to put together the right teams to address the need."*
- *"To be able to establish priority community needs and then to create solutions around those needs. And then to track changes in those needs and also be a shared repository for agencies to report on needs that they are addressing and needs that they are seeing."*
- *"A primary goal should be the efficient use of third sector resources. They should make sure that the small pool of resources that are out there for the use of benevolent users are used in the most efficient way possible."*
- *"The goals should be to enable effective exchange of information and to help the third sector to work together more effectively."*
- *"Leadership development, data collection, advocacy, training, and education. This entity needs to be responsible for organising all necessary training and education and should play a role in evaluating the sector and the activities of non-profit organisations."*
- *"To provide relationship building opportunities between the stakeholders. To provide awareness about the third sector in Bermuda. To advocate on behalf of the third sector. Distribute knowledge about training and professional development."*
- *"If you want an organisation that actually adds value over time in an observable way then like any organisation, you have to have a purpose, a set of standards by which you are measuring yourself, that the outcomes are greater than the cost of the inputs. I worry that there is a cultural trap in Bermuda where people get together to talk and vent, but not necessarily sort through and draw conclusions, and talk about next steps and really hold each other accountable for holding the ball. We have a culture of talking and not doing."*

- *"It has to be a space for asking questions and for sharing. At the outset, it has to be a space for voices to be heard. And then we have an educational element in terms of what people could be doing to realize their goals, mission, and vision, and what needs to occur to improve that. I think that there needs to be a willingness to share, so there is an attitude that needs to walk into it. There needs to be a commitment to the bigger picture. There needs to be encouragement around fearlessness in order to drive change."*
- *"A sounding board for sharing ideas and creating solutions."*

### *Who Should Fund A Third Sector Networking Organisation*

Respondents believed that a networking organisation should be funded by a diverse pool of sources including foundations/donors, Government, and membership dues. Respondents stressed that to receive funding, a networking organisation would have to show through evidence-based data that it is providing significant value to Bermuda's Third Sector.

#### *Selected Verbatim Responses:*

- *"Government grants and public partnership."*
- *"As far as funding is concerned, I can see the Bank of Bermuda Foundation and philanthropists being heavily involved in that and government grants."*
- *"From a variety of sources. Membership dues develop ownership in it. Everybody should have a stake in from community members, to donors, to government and the agencies themselves. I think that it should be a combination of funding so that everybody has a stake in it."*
- *"With a diverse a pool as possible, so funders and corporate funders would have to be key players and when I say funders, I also mean foundations. It makes sense for government to also be playing a role as well as the agencies themselves."*
- *"If they are working for the third sector, they can always be funded by those involved through a membership fee, because if they are saving them some money then there should be some extra that can go towards that networking organisations governing body. So, it could be funding from the members themselves in a cooperative model, or you get a big player that is able to fund it out of their own pocket."*
- *"Given that donors have let infrastructure efforts fall to the wayside, I think that every donor should have a small portion of their budgets go towards infrastructure and capacity building, that would go a long way. You can charge for a member organisation if you have the right mix of resources and you are actually providing a good service, then you can ask for dues. People have to get the value of what you are doing and then you can fund it with a combination of good, solid member contributions or subscription as well as operational funding."*
- *"Partially funded by government. When the island benefits, the government benefits. And non-profits are assisted by companies and foundations. So government funded. Whether it is membership dues or not, those are always tricky. You get somebody like Chubb who has been established and knows what we are doing. Some of the new organisations benefit from networking or guiding, so we do have challenges occasionally where people say why I should pay a membership fee when I am getting less out of it. It has to somehow be funded by those who are a part of it."*
- *"I think that it should be funded by the private sector."*
- *"I think a public/private partnership should fund an effective person or body who is going to lead this."*

## *Who Should Lead a Third Sector Networking Organisation*

Respondents differed in terms of whether they believed the networking organisation should be led by an individual, or a group of individuals. Those who stated that an individual should lead it believed that it should be a paid position, and that the ideal candidate would be someone who is well known and respected, unbiased, innovative, thoughtful and hard working with an ability to lead and delegate. The ideal candidate should be someone who is knowledgeable about Bermuda's Third Sector, community, and culture, and who has a genuine interest in philanthropy and bringing people together. Other respondents felt that the networking organisation should be led by a separate independent non-profit organisation with a diverse team comprising members from the third and private sectors.

### Selected Verbatim Responses:

- *"It used to be the Centre on Philanthropy that people looked to as the nucleus. You need to have something like that that effectively ensures there is communication between the third sector and the Government and all of the agencies out there that are trying to deliver the services."*
- *"It should be a separate independent organisation led by individuals who are identified as third sector experts."*
- *"Someone who has been really focused on philanthropy, someone who doesn't have any personal goals regarding this."*
- *"The people who are heading something like this have to be organised, and they have to know how to delegate. You cannot do it by yourself. It is like a tree you have the leader, and then you have the branches because you have to get to the roots (the roots of the problem)."*
- *"Leadership that is innovative and thoughtful and deeply hardworking."*
- *"A new entity. The individual that runs it should be trusted in the non-profit sector and related to it. It needs to be someone who has sat on non-profit boards and understands how non-profit organisations operate. It needs to be someone well respected and who is committed to ensuring that the new networking entity will be a success."*
- *"It certainly needs to be led by the third sector with the non-profits themselves at the core of the governance at the leadership level, because they know what their needs are. But you also need the private sector because you need their buy-in and financial support and their expertise when it comes to things like data solutions. All of the people funding it should also be involved in planning it, and on the board, because you want that diversity of thinking when you are trying to create something that is going to transform a system."*
- *"You need a group of people to start but you need a vision mouthpiece for that group. You are looking for someone who is seen as neutral, somebody who has an understanding of cultural divide, community divide, business divide. Someone who can sit there and jockey quite well and is able to get the support. It has to be a skilful and experienced Bermudian."*
- *"I think that we are talking about divisions in the sectors, so there could be a non-profit as an anchor that can be the coordinating body. It does not mean that they do all the work but that they start to drive the work of a collaborative. That is potentially one model for anchor organisations in each sub field. The other option is a new structure that we look at as an adaptation from what already exists in the States or in the UK and say this is the model that seems to fit nicely. I would want the Bermuda Tourism Authority model refitted."*
- *"It would have to be a paid position, and it would have to be independent of the existing agencies."*
- *"Someone in the non-profit sector with a genuine commitment to bring people together and to achieving the core objectives of the networking organisation."*
- *"Someone who has a heart for grass root people. Every person running an organisation needs to remember that they could be next to face hardships."*

### *How Third Sector Networking Organisation Should be Organised*

Respondents believed that the networking organisation should either be organised by charitable divisions (e.g. social services, education, housing) or by charitable needs (e.g. by using the streams of the Vital Signs project). In each arrangement, there would be a representative responsible for each charitable area who would be responsible for managing that particular area and collaborating with the leaders from other areas to share information and to create solutions for effectively meeting community needs. Other respondents suggested that the networking organisation should be managed by elected board members or a committee that represented all non-profit divisions.

#### **Selected Verbatim Responses:**

- *"It is where your members hold the power, so you elect board members from within your membership base. I think the people in the groups should be forming and maintaining it."*
- *"It needs a committee; an executive committee and it needs bylaws to follow. It needs to be the leader in achieving charitable status because this kind of organisation needs that status as well. It needs directors from all walks."*
- *"I think that it needs to be organised around community needs. We could start by using something like Vital Signs and by using the streams of Vital Signs to help the membership organisations understand how the work they are doing fits around those vital signs. Having streams of focus, would help us to be more accountable and to come up with goals for each stream and ways for achieving these goals."*
- *"Say it was the Bermuda Community Foundation and under it you had sections and under the sections you have social services, education, housing. There is one head that pulls it all together but they work collaboratively to pull the other groups together. I think there needs to be someone who can pick out of each field whether it is mental health or other agencies like the prisons, such as MWI, such as Child & Family Services and there is a go-to person for each category that brings the information back to the whole umbrella. There will need to be subsections under the main organisation."*
- *"It could be organised by charitable divisions but should encourage cross talk when the need occurs to bring people from different categories together to work on specific projects."*

### *Suggestions for Ensuring a Successful Third Sector Networking Organisation*

Respondents were asked to make suggestions for ensuring that the proposed networking organisation would be a success. To be successful, respondents stated that it would be important for the networking organisation to have a clear vision, mission, and measurable goals. To promote accountability and effectiveness, the organisations efforts and outcomes would need to be measured by an independent entity. Respondents also acknowledged that the success of the organisation would be largely driven by whether non-profit organisations and prospective members were motivated to join. To encourage membership, it would be important to ensure that the proposed activities of the organisation would be perceived as valuable and useful to organisations. This could be accomplished by conducting research or obtaining feedback from prospective members as a part of the creation and formation of the organisation.

### Selected Verbatim Responses:

- *“There has to be accountability to the public, so it has to have transparent goals and objectives. There has to be transparent evaluation and monitoring of the initiatives that are being funded through this initiative. And they have to be given the resources needed to be successful, to be agile, but ultimately success is going to be measured by programs and services that actually have positive impacts. Ultimately the goal is to improve quality of life so people’s lives have to be improved.”*
- *“You need checks and balances and the best way is by having people who are recipients be a part of the process. People who are not invested in a charity, they are Joe Public. They need to sit on committees and be a voice and they need to provide the checks and balances to ensure that the organisation is doing what it intended to do.”*
- *“Encouraging all entities that are involved to actively participate. We can encourage people to be involved in the third sector.”*
- *“The membership organisation must have a clear vision and mission. I think a lot of these things fall apart when you do not have a clear vision, and it’s not well articulated to its membership. They do not know why the organisation exists making it hard to buy-in to or see value in being a part of the organisation.”*
- *“That you have clear evidence for a need which this research helps to establish. You will also need to put into place structures that are proven to work. You will need to create stakeholder buy-in during creation and formation.”*
- *“You would have to establish some measurables, you are going to have some benchmarks that you set up at the start. The worst thing is that it takes too long to set up and people drift. So, it has to be well thought out, fairly implemented, robustly and quickly established and you are going to have to have some guidelines and goals. There will have to be some reporting back from various organisations on a fairly regular basis if you are looking to get funding.”*
- *“The organisation needs to have key objectives, an action plan and accountability. Its actions and impact need to be measurable.”*
- *“There should be some incentive for charities to register to be a member of whatever that organisation is.”*

## Collaboration Around Shared Resources

### *Awareness of Shared Resources*

Nineteen out of 26 respondents (73%) stated that they were aware of providers of shared resources (refer to table 12). The most popular providers included Charities House and Centre on Philanthropy which were both no longer in existence.

*Table 12.* Shared resources mentioned by respondents.

Response	Count
Charities House (in the past)	12
Centre for Philanthropy (in the past)	7
Bermuda Community Foundation (including Guidestar/Give Bermuda databases)	3
IAC	2
Non-profits/cooperatives	2
Ignite has a shared IT service platform and bookkeeper	1
Women's Resource Centre sublets space	1
Canadian Mental Health Organisation	1
I know of charities that share a server	1
Team model platforms	1
Duke of Edinburgh	1

### Usefulness of Shared Resources

Respondents were asked to rate how useful the following shared resources would be to Bermuda's Third Sector on a scale of 0 to 10 (10 - Very useful, 0 – Not at all useful) (refer to table 13).

- Shared physical workspaces
- Managed administrative services (e.g. bookkeeping, marketing, HR)
- Shared data platforms (CRM, data system for measuring success of your efforts or for completing grant applications)

Managed administrative services were rated as the most useful (M = 8.4 / 10), followed by shared data platforms (7.6 / 10). Shared physical workspaces rated as the least useful (M = 7.4 / 10).

*Table 13.* Ratings for how useful different shared resources would be to Bermuda's Third Sector (10 – Very useful, 0 – Not at all useful).

	Managed administrative services	Shared data platforms	Shared physical workspaces
No. of responses	(26)	(26)	(26)
10 - Very Useful	42%	38%	23%
9	19%	12%	4%
8	15%	12%	27%
7	8%	8%	23%
6	4%	8%	4%
5	4%	8%	8%
4	0%	8%	0%
3	8%	0%	12%
2	0%	4%	0%
1	0%	4%	0%
0 - Not at all useful	0%	0%	0%
9 to 10	62%	50%	27%
Mean out of 10	8.4	7.6	7.4

### *Managed Administrative Services*

Respondents believed that managed administrative services would be beneficial because they would lead to cost savings and would also allow third sector staff to focus on their core competencies (i.e. meeting community needs) rather than administration.

Bookkeeping and IT were seen as the most useful managed administrative services. HR and Marketing were perceived as less useful because organisations often employed specific strategies for marketing and HR that they felt were better managed internally.

Selected Verbatim Response:

- *“Marketing and HR are a little tricky because they are generally more related to specific strategy and competition.”*

### *Shared Data Platforms*

Respondents expressed some interest in shared data platforms and gave a variety of reasons why they believed these tools would or would not be useful (refer to table 14). They expressed most interest in a standardized tool for measuring the success of their efforts. They felt that this tool would promote increased accountability and would be particularly useful when they were applying for funding. A standardized tool for completing grant applications was perceived as the next most useful tool. Respondent believed that this could help streamline grant application processes and save organisations time in completing applications. A shared CRM was the least popular shared data tool, but some respondents felt that it would be useful for collaboration and referrals if organisations could share information about the needs of different clients. Respondents cautioned that a shared CRM would be difficult to implement in light of confidentiality and PIPA legislation.

Other cautions related to the use of shared data platforms were that there would always be a reluctance and learning curve to using new software tools, and that it might be difficult and costly to build applications that are flexible enough to adapt to the needs of a diverse range of third sector organisations. It was also highlighted that many of the software applications that the third sector needed were already available by affordable cloud-based service providers.

Table 14. Reasons for perceiving shared data platforms as useful or not useful.

Reasons Useful	Reasons Not Useful
A standardized tool for measuring the success of programs/efforts would be an excellent tool for tracking program success. It would be ideal if one could select from a list of evidence-based outcomes that are aligned with the needs of Bermuda's community.	It is often difficult to share individuals' personal information due to confidentiality and PIPA legislation.
A shared donor portal for non-profits designed by collaborating with funders/foundations would save organisations time in completing grant applications.	It might be difficult to build applications that are flexible enough to adapt to the needs of a diversity of third sector organisations.
A shared CRM providing detailed information about individual clients could be useful for collaborating and referring clients to different services.	The non-profit community might be reluctant to want to take on or learn to use shared resources.
More generally, shared data platforms were perceived as making information exchange among organisations easier.	Many of the applications that businesses need are available in the cloud at affordable rates already.

#### Selected Verbatim Responses:

- *"A standardized donor application portal might be useful provided that it is highly customizable and has been designed to meet the needs of all donors. For this to be a success, it will need to be created through a full consultation process with donors."*
- *"For shared data platforms it just makes sense. Information should be exchanged and the best way for information to be exchanged easily is for people to use the same platforms."*
- *"I like the idea of data system for measuring success. I would love to see a system that allows you to select from a list of evidence-based outcomes that are connected to what the needs are in Bermuda and then you filter in how you are doing against those."*
- *"I am reluctant to support shared data platforms because it is difficult to share people's personal information in light of legislation such as PIPA and I am not sure people want their personal information shared."*
- *"It might be hard that they are customized to meet the needs of different organisations."*
- *"I think that with the Cloud today so much of that is licensed on a user basis and at a really efficient cost. The likelihood that everybody needs the same thing out of the data is probably the 80-20 rule. I would rank that a little bit lower because there are such a menu of Cloud based solutions at a relatively low entry point price."*

#### Shared Physical Workspaces

Respondents offered reasons why they believed shared physical workspaces would or would not be useful (refer to table 15).

The top reason shared physical workspaces were perceived as useful was that they can lead to a cost savings through organisations being able to share offices, boardrooms, and computing equipment. Sharing physical workspaces meant that users could choose to pay for workspaces only when they needed them. Having similar entities operating in the same location was also believed to promote idea sharing and collaboration.

Some respondents felt that shared physical workspaces would not be useful to organisations who needed private offices environments that protected client confidentiality. Respondents also stated that many organisations could function without office space and had learned to do this even more effectively through working remotely during COVID-19.

Table 15. Reasons for perceiving shared physical workspaces as useful or not useful.

Reasons Useful	Reasons Not Useful
Costs savings from being able to share offices, board rooms and computing equipment.	Organisations who have to meet in person with clients might need privacy and confidentiality which is difficult to achieve in a shared office environment.
Can often promote idea sharing and collaboration when similar entities are sharing the same location.	The demand has declined because organisations are trending toward working remotely largely due to COVID-19.
Users only have to pay for office space when they need it. Some organisations only need an office space for a few hours per day, or a few times per week.	Some organisations do not need a physical workspace.

### Service Providers for Shared Resources

Respondents were asked who should be responsible for providing shared resources. They believed that a non-profit entity such as the leaders of the reimagined third sector effort should be responsible for first determining the resources that are needed, and then for creating an RFP to identify companies who are able to provide them. Respondents felt that the creation of custom applications could require substantial funding which could be subsidized by Government, the private sector, and donors/foundations.

### Selected verbatim responses:

- *"I think it would have to be a public/private partnership. I do not think it's fair to put it all on the corporate sector, there has to be some collaboration with Government. Government benefits when there is a strong third sector so should play a role in helping to provide the resources to enable one."*
- *"Private organisations that could be selected based on how well they provide them. Perhaps an RFP process allowing them to bid on providing the services."*
- *"I think that this could be a great role for whatever comes out of the reimagined effort. For one thing it would be good if everyone had access to affordable bookkeeping."*
- *"Service providers who can offer the best pricing. An RFP process could be used to identify them."*
- *"These tools especially any customized applications will need long term funding commitment ideally from a number of sources. They are expensive to create and they need ongoing support so funding is key."*
- *"You need to research first who has the capacity to help in these areas. An RFP process would be helpful for this."*

### *Ensuring the Success of Shared Resources*

Respondents were asked what should be done to ensure that the implementation of shared resources would be a success. Respondents stated that research needed to be conducted to first understand the shared resources that would be beneficial to the third sector. Respondents also stressed the importance of education on “what sharing resources means” and on how they can best be used. To be effective, using shared resources would have to equate to a cost savings, and the terms, conditions and “memorandum of understanding” surrounding their use would have to be made clear to prospective users. One respondent suggested running a pilot study with smaller non-profit organisations to test the usefulness of the shared resources before implementation.

#### Selected Verbatim Responses:

- *“A very clear contract so that all of the organisations know what they have to put into it and get out of it.”*
- *“There would have to be complete memorandums of understanding with all of the organisations, non-profits that may be relying on the resources from this hub.”*
- *“I think there has to be a lot of education and understanding of what sharing resources means. Charities have to know what they are getting into. They have to understand the small print. They must understand the commitments, responsibilities and be educated on how to best benefit from the shared resources.”*
- *“Reminding people all the time that it is there. In many ways the technological revolution has been amazing but in other ways it is overload.”*
- *“The correct service providers need to be selected and the services need to be effectively advertised to the third sector.”*
- *“First you have to identify needs, so you need to do some kind of survey to see what is needed (bookkeeping, IT), and you need funding to support the coordination of it.”*
- *“It is important to run a pilot project so that you can test which ones will be useful and make improvements before implementing them. The pilot should be run with smaller charities and needs to include the appropriate agreements, rules and policies that will come along with using these resources.”*
- *“The sharing terms and conditions have to be crystal clear.”*
- *“Shared resources need to be adopted based on the needs of the third sector. So you need to ask them what they need and make sure they understand how to use them. You also need to make sure that these resources continue to be effective.”*

### *Awareness of Useful Training/Capacity Building Initiatives*

When asked to recall useful programmes, seminars or training workshops that had played a role in helping them to achieve their goals, respondents mentioned training in leadership development (or "how to run a non-profit entity from the board level to the ground level"), strategic planning, financial management and succession planning.

While some respondents stated that formal certification training had been more useful than workshops; overseas conferences which allowed respondents to share ideas and to learn about what was effective in other jurisdictions were deemed useful. Respondents also stated that they had gained valuable knowledge through sitting on other organisations' AGMs.

Some respondents stated that there were limited training opportunities available in Bermuda. Bermuda Community Foundation, Centennial Bermuda Foundation, IAC, Ignite, the Centre on Philanthropy, Wave Crest, and the Bermuda Chamber of Commerce were mentioned as local entities that had offered useful training opportunities.

### *Selected Verbatim responses:*

- *"I was in a leadership development program which was 3-prong. It included online courses and used specialists. It was a highly successful 6-part course that had a lot of information provided when it was over on how to run a non-profit entity from the board level to the ground level. ICT has now picked it up."*
- *"The non-profit leadership development course was extremely helpful. The courses that Wave Crest have offered have been extremely helpful. And IAC's courses as well. Courses specific to charities or non-profits in Bermuda."*
- *"Strategic Planning, financial management, leadership. I know that IGNITE offers these and Centre on Philanthropy used to offer them."*
- *"The Centre on Philanthropy was a tremendous help. The Bermuda Community Foundation held some programs bringing people together. HSBC held some workshops and Bank of Bermuda Foundation held some workshops. Chamber of Commerce held some charitable workshops. There have been a lot of opportunities for people to get more information which is really good."*
- *"International conferences where best practices and case studies have been shared that show how things worked or did not work in that particular jurisdiction which allows you to take away something and adapt it to your own jurisdiction. There are a lot of conferences being held by these different charities especially the religious organisations that are worldwide and there is an opportunity to share attendance and knowledge from that to the other organisations."*
- *"For me it has been formal, accredited training. Workshops are useful but I do not think that workshops are transformative. They are necessary but upping the level of human capital across the third sector is having formal certifications and education pathways."*
- *"I have been involved with the Bermuda Community Foundation around strategic planning and I have learned a lot from other people, so getting us around a table where we can share and listen. I was involved with Bermuda First, and I learned a lot from listening to others".*
- *"International courses, seminars and certifications".*
- *"There have been some brilliant industry sort of membership organisations in the US that I have and continue to work with and attend meetings, trainings and seminars. There is nothing local."*
- *"I didn't find too much on island that was useful to me. There was one on succession planning that I found useful to a degree. Sitting on others' AGMs sometimes is helpful because you can see their structure. My best experience was going to Colombia University for a specific non-profit leadership course."*

### *Training/Capacity Building That Would Help Respondents*

Respondents were asked to recall programmes, seminars or training workshops that would help them to achieve their goals. Respondents mentioned specific training in the following areas:

- Marketing
- HR
- Management and leadership
- Financial management
- Board training
- Strategic planning
- Grant writing, “how to write a good grant proposal”
- Grant assessment, “how to set up an evaluation process for accessing grants”
- Outcome measurement and evaluation
- How to gather and share data
- General computing (IT, Microsoft office and ZOOM)
- Seminars on international best practices

Respondents also stated that they could benefit from opportunities to meet all non-profits and funding organisations operating in the third sector to learn what they do, and to better understand the needs of the community.

### *Selected Verbatim Responses:*

- *“Ones that have focused on data gathering and how to make sure that you share that data in a way that people will understand it. Other workshops would be helpful are on marketing and HR. Until you start to get staff, you don’t realize how much that comes into play.”*
- *“For me it is management - how to manage your team well.”*
- *“Strategic planning training, training on how to run a board, HR management and conflict resolution training.”*
- *“For me personally, it would be grant assessments, grant writing, how to set up an evaluation process for accessing grants, and whether those funded actually achieved what they set out to do.”*
- *“Everybody would benefit from an update from time to time on grant requests. It would be really useful to have tips on what is and is not good. A review of things like Microsoft and computer skills because they change and sometimes it isn’t easy to navigate what is new.”*
- *“IT is constantly changing and we need to keep up with the times.”*
- *“Program design, outcomes measurement and evaluation. There is such a gap in these areas. I would like to be able to have more knowledge and be more of an expert in these areas.”*
- *“Just keeping up to date with international best practices in my area. Looking at similar organisations and collaborating with global partners.”*
- *“Opportunities to meet some of the non-profits. Let us meet all of the non-profits. A single opportunity to meet them all, a single opportunity to meet all of those providing resources and services. Having some sort of focused sessions would be immensely helpful. Having the opportunity to meet new ones as they develop. Having the opportunity to meet with all of the funders on the island so that we know what their focus is.”*
- *“More opportunities to network with other funders and charities or non-profit organisations to get a better understanding of the needs of the community. This would help us to make more informed funding decisions.”*
- *“Zoom training, computer training, financial assistance training (bookkeeping).”*

### *Training/Capacity Building That Would Benefit the Third Sector*

Respondents were asked to create a comprehensive list of programs, seminars and training workshops that could benefit Bermuda's Third Sector (refer to table 16).

The most popular categories of training included:

- Financial management (funding, accounting, bookkeeping),
- How to measure and evaluate impact and to conduct third sector research
- Leadership development and people management
- Communication skills
- Effective governance
- How to run a board/be an effective board member/understand board roles
- Marketing/PR
- Strategic planning

*Table 16.* Programmes, seminars, and training workshops that respondents believed could benefit the third sector.

Response	Count	Response	Count	Response	Count
Fundraising/funding/ accounting/budgeting/ financial literacy	11	Conflict resolution	2	Case management	1
How to measure and evaluate impact/evaluation and assessment/research & data collection	10	Knowing who your clients are/interacting with your clients	2	Collaboration skills	1
Leadership development/ethical leadership/motivating staff/HR procedures	8	Working with vulnerable people/homelessness /shelters/feeding	2	Effective program and service delivery	1
Communication skills/customer relations	4	Digital media/Social media	2	Grant writing	1
Effective governance	4	Non-profit management	2	Mental health awareness	1
How to run a board/how to be an effective board member/understanding board roles	3	Fundraising	2	Mobilizing volunteers	1
Marketing/PR	3	Having integrity as an organisation	1	Personal development	1
Strategic planning	3	BNSC certification	1	Theory of change	1
Understanding the social dynamics of the family	2	Cultural competence	1	Understanding the roles of community organisations	1
Succession planning	2				

### Selected Verbatim Responses:

- *"Leadership, assessment, grant writing, needs analysis and some level of financial acumen such as understanding accounting and budgeting."*
- *"Organisational development and program specific evaluation and training. Organisational development includes board development, financial infrastructure, fundraising, best practices and meeting certification standards."*
- *"Governance workshops for non-profit board members, training on how to be an effective board member, Global trends and shifts in philanthropy, learnings from established foundations globally perhaps through conferences, non-profit leadership development training, financial literacy."*
- *"Cultural competence, budget management, strategic thinking or strategic planning, evaluation and monitoring frameworks, customer relations and research methodology."*
- *"Programming, funding, BNSC certification. Training so that charities can say that they are certified in finance and performance evaluation so that they can say that they are evaluating their programs and events."*
- *"Research, data and outcomes training, a course to talk about all useful resources to non-profits in Bermuda, know your numbers training in terms of data that you should know as it relates to your organisation, board roles/responsibility, thinking outside of the box training."*
- *"The IAC did the program specific training like how to therapeutically interact with clients, how to navigate systems in Bermuda to ensure that clients have their needs met which we call case management, dealing with unaddressed trauma and supervision for success which was a module of how you interact with staff to help them be successful. Those were particularly helpful especially supervision for success because people tend to supervise like how they were raised."*
- *"Program design, outcomes measurement including needs assessment, governance, fundraising, finance and strategic planning. Also marketing and social media. Given that many non-profits are delivering human services training around best practices and around how to deliver services to individuals. Especially when you look through an equity and social justice lens around trauma and diversity being a big issue in the community you want to make sure that service provision are delivered in a way that acknowledges that and helps to heal from that."*
- *"Communication. How do we communicate our message effectively and get it to the right people, how do we communicate with our stakeholders. Supporting our volunteers, how we mobilize them. Through the communication process mobilization of resources. It is communication, mobilization, logistical thinking and planning and measurables."*
- *"Strategic planning, operational best practice, how to manage people within an organisation, policies and procedures for an organisation, business planning for sustainability and growth, marketing, HR procedures."*
- *"Non-profit management, standard accreditation, a piece around government and all that entails, succession planning and program design and evaluation."*
- *"Ethical leadership, finance, budgeting, what is your mission, theory of change, how do you show your impact, the outcomes of your work. Understanding your space and the quality of programs needed perhaps sourcing from overseas to see how they have done that effectively and adjusting it to being Bermuda culture appropriate. Program delivery and quality. Things around governance, making sure that the governance is in place, how to write a third sector business plan."*
- *"Evaluation and assessment of programs, consistency of how we look at organisations."*
- *"Financial management, strategic planning, measuring outcomes, measuring impact, collaboration skills, marketing and communication."*
- *"Working with vulnerable people, bookkeeping, case management."*
- *"How to embrace and get the most out of digital media, how to measure and evaluate impact, effective Governance."*
- *"Financial assistance (accounting), communication skills."*

## *Who Should Provide Third Sector Training/Capacity Building*

Respondents were asked who should be responsible for providing third sector training and capacity building. Some respondents believed that training could be established informally by the third sector collaborating to identify members or organisations that are capable of providing training and capacity building. However, the consensus was that there needed to be one central organisation that would offer “a comprehensive network of training and development” opportunities to the third sector. It was believed that this organisation could collaborate with Government, philanthropy, and non-profit organisations to identify entities most suitable for delivering specific training and capacity building. The IAC was mentioned as an existing organisation that may be best positioned to facilitate this.

### **Selected Verbatim Responses:**

- *“The BNSC is responsible for a lot of the certification courses and I think that the Bermuda Community Foundation, Centennial Foundation and the IAC do a really good job with the workshops that they put on. And Wave Crest does a really good job of providing those types of courses.”*
- *“There should be collaboration. IAC is one, AFP, the new group TLC. I don’t think that it should always be one umbrella doing everything.”*
- *“Perhaps a leading third sector organisation. To my knowledge, this is what the Centre on Philanthropy did. Perhaps, The Bank of Bermuda Foundation or the Bermuda Centennial Foundation could take care of managing some of it.”*
- *“This would be a collaborative between the Government and “the hub” because you would want to ensure that you are embracing as many people as possible and giving them a better understanding of all of those various needs and the impact of some of those organisations within the community.”*
- *“I don’t think that it should just be one Government organisation I think that it should be quite a few. Workforce Development, Social Assistance, there can be many different government agencies that help. I think that we are talking about pockets full of people in many different areas.”*
- *“I think that should be an entity that exists to support capacity building. IAC does a lot of Capacity Building.”*
- *“I like the model where everyone has their strengths, and they have a little piece that they can help with. It can be all of those collective organisations that are involved in this conversation.”*
- *“I feel like funders and donors have a role to play. I think to date, funders have been quiet with regard to what they are expecting from non-profits and charities. If they are going to offer access to grants, then I think that they should provide some training on what they are looking for or how to improve. It could be a combination. I think that there are service providers that could see this as a business opportunity. If there was a one stop shop organisation that focuses on that philanthropic area it would be them but in light of that not being available, I also think that could be a potential revenue stream for non-profits if there is an area that they feel particularly strong in.”*
- *“We no longer have that foundational body, so people are just piecing it together. This is about deep capacity building and deep infrastructure, so picking off the pieces that feel good or that you are comfortable with is not the same as providing a comprehensive network of training and development. We need someone who can provide a comprehensive network or training and development.”*
- *“In an ideal world, the government would be doing it. You are talking about a government that is fundamentally inefficient and lacking in its own skill and capability. Given where we are and the constraints and the circumstances we are in, it either has to be a private sector solution or a social enterprise where there are a suite of solutions that are delivered into the third sector at a rate that is designed to help the third sector rather than to create profit. I can see a group of like-minded people creating something like the service bureau that is giving back to itself. That is self-perpetuating. In Bermuda there might need to be a novel approach to it.”*

### *Ensuring Awareness of Training/Capacity Building*

Respondents believed that effective promotion through a third sector networking organisation would be the best way for advertising training and capacity building initiatives. Another suggestion was to target charities by using the Bermuda Government Registrar of Charities list.

Email and social media were mentioned as the top two methods for increasing awareness of training and capacity building initiatives. One respondent suggested creating a dedicated App that could be used to inform the third sector about training, capacity building and related opportunities.

#### Selected Verbatim Responses:

- *"The networking that we talked about would be perfect for this because members would be able to go in and see what is available."*
- *"This can be done through work emails and effective marketing. If it exists, through a networking organisation that can reach out to all non-profits."*
- *"The two big funders have a lot of sway in getting charities to participate in courses because as soon as an email comes out that says they think you should do that course then everyone signs up."*
- *"Effectively advertising them through an organisation that has access to all third sector stakeholders. I would say that for the most part non-profits are aware of the existing ones."*
- *"I think the information could be sent out to all registered charities. The Bermuda Government who has contacts for all registered charities could create a central repository of information about training and capacity building."*
- *"I think that it is where funding for marketing and communications comes in for guidance on how to clearly communicate things without it being an overburden but makes things clear and has different methods. Some people will get the information better through email and others through social media, so you need to have that wide range of platforms. I also think that if you create it as a membership network, then you assume that by bringing people into your membership they will be more aware as well."*
- *"Wouldn't it be good if there was an App and through that App you are able to be updated with what training is available, who is doing what and what volunteer opportunities are available. There are the two girls that presented an idea at Rocket Pitch and it is called Volunteer Bermuda, it is a brilliant idea."*
- *"Better promotion utilizing all outlets and channels. All forms of media where it is appropriate. You have to dominate all media and you have to do it on a regular basis."*
- *"If we get the other ingredients right that I was talking about before, it is evidence based, you know what you need to grow your organisation in a very planned way, then you are going to know about it. That is where having good leadership with good capacity comes in."*
- *"Social media, direct emails."*

## *Ensuring Training/Capacity Building Are Meeting Third Sector Needs*

Respondents were asked what could be done to ensure that training and capacity building initiatives continued to meet the needs of the third sector. The top suggestions were to obtain feedback from respondents on these initiatives, and to use that feedback to make improvements, and to drive future initiatives. Respondents stated that care should be taken to ensure that training and capacity building initiatives were developed to keep the third sector informed of new legislation that may impact organisations (e.g. PIPA), and to ensure that training and capacity building initiatives aligned with international trends and best practices.

### **Selected Verbatim Responses:**

- *“Evaluations after seminars and asking stakeholders to give feedback on the types of seminars/training/capacity building that they would like to see offered in the future.”*
- *“Capacity building and training initiatives should be evaluated by those who take part in them. The provision of training has to be organic – it has to evolve as the needs of the sector evolves.”*
- *“They need to continually reach out to non-profits to survey them to see what they actually need. They can look at the response rate for the courses that are provided and they can reach out to various organisations like the Association of Professional Fundraisers to say ‘what do your members want, what courses do your members want or need.’ I think they also need to keep up to date on all the changing regulations and different things because I think charities need to be kept up to date on that. Wave Crest just had one on the new PIPA Act.”*
- *“I’m a believer of data collection from the sector asking them what they need and building programmes around that. Evaluations of different training programmes are a good tool for ruling out what was and was not useful.”*
- *“Commitment to PQI (Performance Quality Improvement) which is assessing what you are doing, getting feedback from stakeholders, constantly checking in on the needs and making sure that what you are providing is relevant. So, having some kind of way to annually check in on what the needs are of your stakeholders and the extent to which you are meeting them. And using more of the national data around needs to inform capacity building.”*
- *“They need to get feedback from all of the organisations. Maybe survey them every so often to see what they need and what they like.”*
- *“You have to continue to get feedback from the third sector on what is relevant in that moment in time. Building a feedback loop for evaluation and feedback. And I think that there continuously has to be a global scan to what is best practice internationally with regards to the third sector.”*
- *“You need to find the right people to lead them. People who are innovative, who have growth mindsets, who are quick to pivot and quick to respond and when they do respond they do it in an evidenced-based way that meets the scenarios presented.”*
- *“They should all be electronic and, in a library, so that they can be accessed when and as needed but then that requires someone to ensure that they are updated on a regular basis to ensure that they are still relevant.”*
- *“This is part of that metrics piece, that once delivered then it needs to be assessed, surveyed and the data needs to be interpreted and listened to.”*
- *“Ask for feedback to ensure that the resources are useful. Ensure that the list of resources available aligns with the needs of third sector stakeholders. Ask them.”*
- *“Get feedback from those attending the programs and use the feedback to do better.”*

## Usefulness of Potential Tools for Reimagined Third Sector Effort

Respondents were provided with a recap of the three resources or tools that had been discussed as a part of the interview (listed below). They were then asked whether they believed each of these resources or tools should be developed as a part of a reimagined third sector effort.

### *Recap of Third Sector Resources or Tools*

- *Tool for understanding the needs of Bermuda's community*
- *Collaboration tools and efforts*
  - *Third Sector Project Collaboration*
  - *Third Sector Networking Organisations*
  - *Shared Third Sector Resources (e.g. Physical workspace, administrative services, data platforms)*
- *Third sector training or capacity building initiatives*

While almost all respondents felt that all resources might be useful for a reimagined third sector effort, "Understanding the needs of the community" was more frequently named as the most important resource (56% rated it as most important), followed by "Training and capacity building" (32% rated it as most important) and then "Collaboration tools and efforts" (12% rated it as most important) (refer to table 17).

*Table 17.* The percent that respondents rated each resource most important or useful to develop as a part of the reimagined third sector effort.

	Percent
Number of responses	(25)
Understanding the needs of the community	56%
Training and Capacity building	32%
Collaboration	12%

### *Importance of Understanding the needs of the community*

Respondents believed that understanding the needs of the community was particularly important for creating an effective strategy for meeting community needs. Without doing the "diagnostic work" to determine what the communities needs are, the third sector would be "swimming in the dark" or operating without a clear evidence-based strategy. It was believed that the third sector did not currently have a clear understanding of community needs, and that to be effective there needed to be emphasis on determining the root causes of social problems. Creating solutions which addressed the root causes would help the third sector work toward mitigating or eliminating social problems.

### *Importance of training and capacity building*

Respondents believed that training and capacity building were important to ensure that the third sector was equipped with the necessary manpower and resources to allow it to be able to accurately understand community needs, to lead and manage organisations, to create solutions for addressing needs, and for determining how the third sector could best collaborate to meet community needs.

### *Importance of Collaboration*

Collaboration was seen as important for obtaining a complete understanding of the tools and resources that the third sector currently had available. Respondents felt that collaboration offered an opportunity to promote dialogue for understanding community need, for determining the training and capacity that the third sector needs, and for creating strategies to work together to operate more efficiently and cost effectively.

Respondents felt that a networking organisation would promote a greater understanding of the third sector making it easier to collaborate on projects and to refer members of the community to the correct organisations for meeting their needs. Respondents believed that shared physical workspaces and administrative services (e.g. bookkeeping and IT) could lead to significant cost savings.

### Selected Verbatim Responses:

- *“Understanding the needs of Bermuda. [The others] are important and they should be included but the priority is for them to understand the need.”*
- *“Tool for understanding the needs of Bermuda’s community, third sector training, collaboration tools. . . we need to understand the need in order to service Bermuda’s community to be the most effective, but we also need the training to be able to do that properly.”*
- *“I think that before you can do anything you need to understand the needs of the community. I think shared resources and shared workspace and the data sharing are good because there are going to be a lot of cost savings involved.”*
- *“I would say all of them. Number 3 (Third Sector training or capacity building) is probably the most important but number one (Tools for understanding the needs of the community) is important first for understanding what is needed. In terms of the shared resources I would think the administrative services are most important especially IT and financial services.”*
- *“I’m leaning towards collaboration tools. All of them are important but I think a networking organisation is perhaps the most important. We need to understand the resources we have and how we can effectively and efficiently work together. Networking can help facilitate conversations for understanding community needs. Understanding the needs of the community is also important because if you do not understand the community’s needs it does not make sense to start building capacity. Needs assessment will tell you what you need in terms of capacity, training, and resources. Shared tools are also useful but would be third most important to me. I think all three are important.”*
- *“They are all useful and can each play an important role in helping us to operate more effectively. We cannot be completely successful without all of them.”*
- *“They all have their place. If you want to start you have to get some collaboration going. You need to talk to the sector as a collaborative to understand what you have as a third sector. Then you can talk about the problems and establish how you can solve them.”*
- *“I think the priorities would be the tools for training, then tools for understanding and third would be the collaboration. The training is critical.”*
- *“Number one would be tools for understanding the needs of the community. Unless you understand the needs of Bermuda’s community and understand how they are evolving and changing then you can’t create solutions or programs and services. Shared resources would be second, then networking, then training and last would be collaboration. I think that they all do have value. I think that the Third Sector support model should have a range of options.”*
- *“I believe that training or capacity building is needed because there is a gap. Everything else from there goes up. If you get the people trained, they understand what they need to do and know how to lead and manage and grow the organisation, then they are going to know how to understand the needs of Bermuda’s community. They are going to know how and with who to collaborate. They are going to know what organisations they need to grow or build. They are going to know who they need to be working with and the resources that they need.”*

- *“That is the problem with a holistic integrated system. It is only as strong as its weakest capability. The thing that is most important is the diagnostic work. You need to know what problem you are solving first before you can decide what is needed next. I think that a lot of us know what the needs are. I think that before that you need to look at the root causes that are causing the effect for those needs. Then you can identify the best solutions that deal with the root causes of the needs. Once this is done future social problems can be reduced or eliminated.”*
- *“I think that they are all important and it is important to start with what is achievable. If we do not do number one (understanding the needs of the community) then we are swimming in the dark. If we are going to do collaboration, we might need training.”*
- *“By collaborating we can have a greater impact and operate more efficiently and effectively. People in the community usually have more than one problem. Knowing the other organisations that are out there can help you to point people in the right direction. Sharing resources like IT, bookkeeping and office space can help to reduce expenses.”*
- *“You should first try to understand the needs of the community and then determine what capacity you need to meet them. The next step would be how do we work together to meet them.”*
- *“Number three I think is most useful because in order to address community problems you need capacity and skills so this is key. Next you need the manpower and resources and the right strategy so I think Collaboration is also important. Third understanding the needs of the community is important for having a more rounded view of the specific social challenges that need to be addressed. At this stage you will be in a position to address them because you have the tools and resources to do so.”*
- *“They are all useful. Number one (Understanding the needs of the community), because I do not think that they truly understand the needs of Bermuda’s community. We need to reach out to the most needy in our community. We are seeing a new generation of young people. We really need to look at the root causes of why things are happening. We need to understand the needs of the community and accept that people have problems, that they need to be dealt with. I would not go with number two (Collaboration tools and efforts) until people understand the third sector. Once we understand the problem, we can talk about the capacity or training or skills set that we are going to need to solve it. Then we can focus on how we are going to work together to solve the problems.”*

### *Usefulness of a Central Place/Portal for Accessing Third Sector Resources*

The majority of respondents (62%) believed that a virtual and physical presence would be useful for gaining access or learning about resources which formed a part of the reimagined third sector effort. Just under 4 in 10 (38%) felt that a virtual presence alone would be sufficient (refer to table 18).

*Table 18.* Whether respondents believed it would be useful to have a virtual, physical, or virtual and physical presence for gaining access or learning about resources which formed a part of the initiative.

	Total	Non-profit (direct service provider)	Quango	Private Consultant	Government	Foundation (Corporate, private, community)
No. of responses	(26)	(6)	(5)	(4)	(6)	(5)
Yes - Virtual and Physical	62%	50%	80%	50%	83%	40%
Yes - Virtual only	38%	50%	20%	50%	17%	60%

### *Ideal Virtual Tool for Accessing Third Sector Resources*

Respondents described the ideal virtual tool as a website or “hub” with access to resources such as videos, useful links, webinars, and tools. It would be a place where users could engage in online chats, host online meetings, and download useful documents. A website was seen as a more cost-effective and convenient solution because it could be accessed whenever the user needed support, information, or resources.

### *Ideal Physical Place for Accessing Third Sector Resources*

A centrally located physical presence was seen as advantageous for in-person training, collaboration, and brainstorming. While third sector stakeholders had become accustomed to virtual communication during COVID-19, it was believed that meeting virtually did not always have the same value as a ‘face-to-face’ meeting.

### *Selected Verbatim Responses:*

- “Virtual would be a very comprehensive website where you be able to download documents and have online chats. Physical location would have to be centrally located in Hamilton.”
- “The hub. It would be a mixture. Virtual allows us to be effective without having to move.”
- “There still needs to be some physical space where we can go for the human touch.”
- “I think that it has to be both because access physically is okay but sometimes not everybody is going to be available, so it is going to be necessary to do more virtual meetings.”
- “You would definitely need a user-friendly website. For me, a very well put together website with webinars or in-person meetings to help the Third Sector understand the new initiative. A very solid and well-designed web presence is key to the success of the initiative.”
- “I probably would lean towards virtual. Ideally a website which has information for registered and non-registered charities/start-ups. For non-registered charities/start-ups basic information would be provided on the requirements of starting a non-profit. For registered charities, they would have access to deeper tools, resources and information.”
- “We need an online resource centre which includes a collection of videos, links and tools that the third sector needs. This online resource centre can be a gateway to the three tools we

*have been discussing. I do not think a physical space is as important, but it could be useful for hosting collaborative meetings and for in-person training."*

- *"Yes, that is what the Centre on Philanthropy did which was really useful. There is nothing the same as having a meeting face to face. Face-to-face meetings are still incredibly relevant. Zoom meetings have been very useful and people will continue to use them but it doesn't mean that it is going to replace face-to-face meetings."*
- *"In our current situation, it should be virtual, and to be cost effective it should be virtual. For being able to change and modify information, it should be virtual."*
- *"I think having a very good website is most important. The physical space is not as necessary because it can be expensive to manage. As long as there is great awareness of the online presence."*

### *Other Resources to Consider for the Reimagined Third Sector Effort*

Respondents were asked to recall any other important resources that they believed should be considered as a part of the reimagined third sector effort. One respondent suggested that the reimagined effort should consider conducting a manpower survey because this was a useful tool for assisting with the operations of third sector entities.

Other respondents mentioned specific resources that would come under the training and capacity building and networking wings of the initiative. In terms of training and capacity building, respondents felt that it would be very important to place emphasis on the best strategies for funding the initiatives. This could be accomplished by effective fundraising training. Other training and capacity building initiatives included training for donors (i.e. training on how to work with non-profits and how to make funding decisions), training to understand government services and how best to collaborate with them, and online certification programs.

In terms of networking, respondents stated that an emphasis on advocacy around policy changes that could benefit the third sector would be helpful.

### *Selected verbatim responses:*

- *"Make sure that the reimagined effort includes training and resources for all stakeholders including donors. Donors require training in networking and tools for better understanding whether we are meeting the needs of non-profits, and on how we can effectively work with non-profits. Ideally, we need to be able to work closely with non-profits to listen to them to understand how we can help them to meet the country's needs."*
- *"Staff wellness training and understanding government. Government does play a big role but I do not think that it is very efficient. I think some good connections so that the Third Sector knows how to refer people to the government systems that can help them."*
- *"Resources for how best to collaborate with Government."*
- *"I think that we also have to look at what is happening globally, what is working in other countries. I think that we need to stop thinking about reinventing the wheel rather we should look at what is working elsewhere and what the outcomes are."*
- *"We need to get a perspective from someone outside of Bermuda on what we are trying to do."*
- *"I think that advocacy is another component. Once you understand the needs where there are gaps that cannot be directly addressed by the training and services of the third sector, there is a role to play to drive advocacy for policy change."*
- *"Something around finances. I am referring to getting money."*
- *"I found it useful when the Centre for Philanthropy used to do its annual manpower survey and the reports that came out of it, because that is important information to have to tell the story of the third sector. There needs to be economic supports on the third sector, quarterly economic development updates and how that relates to Bermuda's overall economy."*

- *“I don’t see anything here around making money. The sustainability and generating revenues that cover costs. It is not about profit. It is about how do we keep doing what we are doing while pivoting and covering our costs.”*
- *“I think that for those that are new, having access to certification programs online would be brilliant.”*
- *“One big piece of the puzzle that is missing is tools for foundations on how to fund. There seems to be less and less philanthropic funding available. Often times funding goes to organisations that can present information in a proposal in the most sophisticated way and not to areas that need it the most. We need access to tools to be able to make funding decisions that are going to have a greater impact on society.”*

## Leadership of the Reimagined Effort

Respondents were informed that an advisory committee comprising 20 stakeholders including non-profits and charities, government departments and ministries, foundations and individual donors and community members *could* be responsible for the future planning, implementation, and future management of the reimagined effort. They were then asked to offer suggestions and considerations for ensuring that an advisory committee would be a success.

Overall, respondents felt that the proposed advisory committee represented the most important third sector stakeholders. A few respondents suggested adding individuals skilled in research and in training and capacity building.

Respondents stressed that advisory committee members needed to be hardworking, committed, unbiased, organised, and to be individuals who engendered trust in the third sector community. It was believed that advisory committee members should be as diverse as possible with respect to demographic factors such as age, income, education, size of organisation and experience level.

To ensure that stakeholders had confidence in an advisory committee, it was believed that advisory committee members should be selected using an objective and fair process. It was also important that any stakeholders that wanted to be advisory committee members, but were not selected, were offered some role in the process, to ensure that they remained engaged and committed to the initiative.

Respondents felt that to be successful, an advisory committee should have key objectives and timelines, and should be held accountable for meeting them. It would also be important to ensure that group members had no “conflicts of interest” and operated in an unbiased way that benefitted the third sector.

A few respondents were not sure that an advisory committee would be the best method for driving the initiative because advisory committees had a tendency to be ineffective, and to spend more time complaining and getting side-tracked by irrelevant issues. It was also believed that advisory committees often had difficulty making collective decisions due to members having different agendas, conflicts of interest or competing interests. To remedy this, it was suggested that an advisory committee should be led by, or report to, an unbiased organisation or individual that would ensure that the advisory committee was meeting objectives and timelines and operating in a way that benefits the third sector. Respondents stressed that the initiative should not be donor led but should be led by other entities who are well known, respected and knowledgeable about Bermuda’s Third Sector.

### Selected Verbatim Responses:

- *“It is finding a person who really wants to work collaboratively and someone who listens and has the ability to come to a meeting and put their cell phone away.”*
- *“So it is apolitical but it has a champion. Whatever they come up with, there needs to be a deliverable and that is where the champion comes in.”*
- *“It’s about who you select, about the buy-in process and there has to be no bias. I received an email about this and the chatter among the sector is that it is critical to select the right people. If you pick the wrong people, there will be no buy-in. Transparency will be extremely important when making selections. You will need very clear criteria for how the 5-6 people who represent the non-profit organisations will be selected. You have to ensure that they operate in a way that represents the needs of the Third Sector and not their own interests.”*

- *“Based on my experience with setting up large organisations, you have to engender trust. There needs to be faces that people do not have an aversion to, and that can be difficult because Bermuda is small. The people leading this need to be able to engender trust toward the initiative. . . There also must be clear and objective criteria for selecting people with rationale for why certain people were and were not selected.”*
- *“The advisory committee has to come from all of the sectors that you mentioned here. If they have representation at the table, I think that it will be helpful because it will provide on-going updates, changes and new considerations that need to be brought to the table.”*
- *“I think that you need to have one person or organisation that is responsible for organising it and making sure that those 20 stakeholders are fully on board and have the time to commit. It is easy to sit and advise but you need to actually implement and do the work and manage it. I would say that it needs to come from an organisation like the IAC. Not a big funder because if you have a big funder in there, charities are not going to be forthcoming. The IAC or the Chamber of Commerce has a charity branch that just started up. It has to be someone who has the time, is organised and is going to implement it. The Centennial Foundation has the funding but the IAC is impartial.”*
- *“It needs to understand the needs of the community and needs to be able to react and solve the problems. It needs to have some quick wins as well. You are going to set up this group and the danger initially is that it does too much analysis, “paralysis by analysis”. People are going to want to see some tangible results coming out quickly.”*
- *“That it is action-oriented, action-oriented subcommittees and time limited projects; having steps and a timeline with an ultimate goal.”*
- *“I think the process used to select participants especially when it comes to the non-profits and charities. There is a lot of sensitivity around things being donor driven and donor lead. At the same time, it cannot be everyone and you want to make sure that you have a diverse group but that the process used for selecting those non-profits is deemed to be a fair process. In terms of a fair process, it will have to be one where any non-profit that is interested has the opportunity to somehow participate, even if they do not end up being in the advisory committee. That they have the option to have their voice heard on how it is all going to occur.”*
- *“You need the right people; your list of stakeholders is right. There needs to be some work done on who the executors are, and you need to have a very tight deadline, you need to put pressure on the results.”*
- *“It needs to have representation from each one of the divisions. It has to be representative of both small charities and larger charities, newer charities, and older, more established charities. It is important that there is a range of that. Government needs to be involved, and I feel like there should be a representative from the cabinet office and from the finance ministry. You need to have representation from the core of Bermuda’s systems, it needs to be policy driven. I do think that you need to have donors and foundations and I think that it should include people from the community who use the services of charities.”*
- *“That there is a good mix in representation. You might want some research people as well as capacity building organisations. I think that we have to be really careful about individuals without an institutional affiliation. I would be very light on individual donors and community members because at the end of the day change is not made by them.”*
- *“It is hard to imagine 20 different stakeholders like that coming together. It is a necessary condition to have different stakeholders at the table, but it not a sufficient condition. I see the worry and issues with it faster than I see it as a solution. You want the best to succeed and the worse to fail. The reason that some organisations do really well is that they are left on their own. You can just see an unintended consequence by trying to force collaboration, and then the third sector becomes more fragmented. I would be surprised if these stakeholders who all have different agendas can get into a room and agree on 2 to 3 things that they are going to do. I think that this will not be successful because you are pitting organisations against one another who have different timelines and priorities for different outcomes.”*
- *“Diversity at every level including age, race, investments, etc.”*
- *“The third sector has to find ownership from within, that somebody who is willing to take the reins of the initiative and drive it, otherwise I don’t see how they will arrive at a meaningful outcome. There has to be a smaller leadership core with targeted outreach by topic or*

subtopic for people who undertake to be truly committed to advancing that one topic. My inclination would be to break this problem up into much more manageable pieces. I have seen the workings of advisory committees like this where nothing tangible gets accomplished because people cannot agree or get side-tracked by not focusing on the task at hand.”

- “You want to give these folks a winnable gain and to put multiple stakeholders with different timelines and competing interests in a room and say you are the leadership of the reimagined effort it could be great but it is a tough one. We do not have a great track record in Bermuda of building success that way. We are a living laboratory in Bermuda, and we should be able to get people in a room and make good decisions and go execute. The best that I have experienced that in Bermuda was the America’s Cup, it was a specific initiative that we delivered and created real value and it was around a deadline that wouldn’t move, a budget that wasn’t going to move, and it was a way of galvanizing people around a specific thing. If we try to boil the ocean, and we do it without very specific deadlines and deliverables, it could be disastrous.”
- “Making sure that it is a diverse group not just in the services, but also in race, age, economic background and education. I want to hear from the people who are going to be running these organisations in the future so there needs to be young people.”
- “The advisory committee members will need to have a depth of knowledge and a genuine interest in making this thing work. The problem is that everyone has their own interest and biases and it is hard for them to be genuinely interested in bringing about societal change. It is hard to avoid “conflicts of interest”. It is also difficult to specifically include some members of the community in an advisory committee and exclude others without the excluded feeling disenfranchised by the process. These individuals may become less engaged and interested in the initiative. Advisory committees also tend to be ineffective. They spend hours sitting at a table complaining about things and not focusing on solutions and goals. There would need to be someone overseeing the advisory committee and holding it to account. Is there a better way of doing this? You need to have the right person or group running the show. They need to have specific goals, timelines and a process for making objective decisions that stakeholders buy into.”
- “They all need to have the community at heart and not have a selfish agenda.”

## Who Should Definitely Be Representing in An Advisory committee

Respondents were asked who should *definitely* be represented in an advisory committee (refer to table 19).

The most popular mentions included:

- All of those included in the list provided
- Funders, Donors/Charitable Foundations
- Government
- A diverse group of individuals

Table 19. Groups that should *definitely* be represented in an advisory committee.

Response	Count	Response	Count
All those included on the list provided	5	People with administrative and organisational skills	1
Funders/donors/Charitable Foundations	5	People who understand the community	1
Government	3	People who understand business systems	1
Diverse group of individuals	3	BNSC	1
Frontline staff/service providers	2	Religious groups	1
Bermuda Community Foundation	2	GMOs (international and local)	1
The people that we are serving/service users	2	Charities Commission	1
Centennial Bermuda Foundation	2	Young people/single parents	1

## Selected Verbatim Responses:

- *“You will need good representation from the different non-profit streams. It could be broad categories such as feeding programmes or family support. There needs to be someone from the Charities Commission involved, so that whatever comes out of this is in alignment with legal requirements. There also needs to be representation from the Corporate sector and from donors.”*
- *“You need people who are on the frontline, you need people with good administration and organisational skills, people with an understanding of business systems, people with an understanding of community-run organisations, people who are well equipped with knowledge about what is happening in the community. You need people with a vested interest in ensuring that this is a success.”*
- *“Third Sector, Government, service providers, funders.”*
- *“Centennial Bermuda Foundation and Bermuda Community Foundation. I think that they have demonstrated true leadership through COVID-19.”*
- *“I think some of the stakeholders should be some of the people that we are trying to help, someone who has first-hand knowledge of what they need. You need people who can give a different perspective. If we do not hear from them, we could be making decisions for them that they may not think are worthy.”*
- *“The relevant Government departments, non-profits, foundations, donors.”*
- *“All of the ones that you have here. You are going to have to pick out the best ones because you want diversity and balance. You need the right people that cover a broad range.”*
- *“BFC, Centennial Bermuda Foundation, private individuals who fund charities, and charities from a cross section of key areas.”*
- *“I wouldn’t go with government departments. Those from the community from different areas like health, education, economy, and development. You have to break it down into groups that represent the biggest issues facing the community.”*

## *Communications Between Advisory Committee and the Third Sector*

Respondents were asked how often an advisory committee should communicate with them and what the best communication method should be. Respondents stressed that communication was important to maintain stakeholder engagement and buy-in, and that an advisory committee should communicate in a strategic way that would reach all aspects of the third sector. The most popular communication preferences were email, followed by virtual town halls or ZOOM meetings, social media, a central website or through a newsletter. The majority of respondents preferred monthly or bi-monthly communication and stated that an advisory committee should communicate whenever they had something significant to report.

- *"It should be by email and virtual town halls. Giving people an opportunity to hear about what you are doing and to ask questions is going to be vital. ZOOM and the virtual meeting evolution has made this much easier, and people have really gotten used to it so having these meetings is not too difficult."*
- *"Monthly or bi-monthly meetings. There should be a standardized report that members give to the stakeholders. The report should look at the goals, steps, and outcomes. They need to know if the outcome was what they expected or not."*
- *"Through email, Zoom meetings; at least quarterly."*
- *"A monthly newsletter that can just be a 1- or 2-page flyer, minutes of meetings should go out as well when it is not confidential so that it is transparent."*
- *"Townhalls, social media updates and email updates. For how often, as long as there is something relevant and if there are long gaps in between having something relevant to say, provide updates on how things are going."*
- *"There are going to have to be regular updates, it could be an email, it could be a PowerPoint presentation, it could be a ZOOM meeting. Timeline is going to be tight. You are going to have to have lots of little sound bites. You are going to need someone who is pretty smart in terms of that communication piece."*
- *"A monthly email with progress updates would be helpful, and quarterly or bi-annually a substantial meeting of the sector."*
- *"It could be that it is daily, but relevant information to the relevant organisations and stakeholders. It is about the sophistication of delivering a message, so for some it will be social media and for some you will have to follow that up with an email. It is about not leaving things to chance. It is also not assaulting people with information that is irrelevant or false."*
- *"Electronic, like email. If you had that central website you could use that."*
- *"A weekly update from the working group on what they have worked on."*
- *"They should reach out to them as often as possible using various methods – email, in-person or virtual meetings, maybe a web presence."*
- *"This will only work if the third sector feel engaged and a part of it. They need to be informed on regular basis on the progress of the initiative and they need to see the results of the initiative as they unfold."*

Respondents stated that they would like for an advisory committee to keep them informed on progress toward meeting stated goals, and on how their activities will ultimately benefit the third sector.

### **Selected Verbatim Responses:**

- *"Progress toward stated goals and decisions that have been made since the last communication."*
- *"A summary of what has happened to date, things that are going to happen, and any feedback on various pieces."*
- *"Upcoming projects and project updates."*
- *"Updates on progress and next steps and information that has been obtained."*

- *"I am a big proponent of speak when you have something to tell. If this organisation is working well it will always have something to show because it will always be doing something and evaluating it to its stakeholders."*
- *"If there is a list of tasks, they just keep us updated on where they are with each task, there should be timelines for action item."*
- *"Keep them up-to-date on what is occurring as far as the project is concerned."*
- *"Information on how it is progressing and on how what they are doing will benefit the third sector."*

### *Feedback Advisory committee Should Seek from Third Sector*

To ensure stakeholder buy-in, trust, engagement, and transparency, respondents felt that there needed to be effective channels that enabled stakeholders to provide feedback on how they felt that the initiative was progressing. One respondent suggested that feedback should be solicited throughout the process and accomplished via a feedback loop in which at every step of the way that different components of the initiative were being implemented, stakeholders were given the opportunities to make suggestions for improvement. Another respondent suggested including non-profit organisations in a pilot programme where they would be given an opportunity to test different components of the initiative before they went live.

### *Selected Verbatim Responses:*

- *"They need to get feedback on what they are planning to do. Discussion groups are a really good way to get that feedback. I think that you get more out of it when people are discussing it, more ideas come up."*
- *"Any feedback on how they are progressing. There needs to be open channels of communication where the Third Sector has access to the committee to provide them with any feedback that they want at any time. For trust to be established, there needs to be communication and transparency."*
- *"Feedback on how they feel about how things are going, and suggestions for improvement throughout the process. I think I heard something about a survey going out to all non-profit stakeholders. This would be a good way to get feedback right now on the initiative and to continue to obtain feedback."*
- *"Feedback, thoughts, ideas, creativity, the good, the bad and the ugly."*
- *"I think that they should send out an invitation to see who wants to be in the pilot program. I think that they should be looking for feedback on whether or not the vision as well as the goals and objectives are reasonable or aligned. And feedback on the implementation strategy and timeline."*
- *"I think that you always want to lay out a process and get input on it. The thing that you always need to be careful about is laying out the process and options in a standardized way."*
- *"Feedback on their opinions of what is being implemented."*
- *"They should allow stakeholders to give them feedback on how things are going and to offer suggestions for improvement."*
- *"You will need continuous feedback from stakeholders on how things are going. I think this process needs to be eased into, and should be accomplished by a feedback loop where you implement things based on stakeholder need, get feedback from them, make changes to them, if it doesn't work amend the changes. This is the only way that we are going to be sure that it is beneficial to stakeholders."*
- *"Constructive criticism on what they are doing and feedback for helping them to ensure what they are doing is what the third sector really needs."*

## Closing Message or Piece of Advice

Respondents were asked to offer a closing message or piece of advice for helping to ensure that the reimagined third sector effort would be a success.

The key messages were as follows:

- Find the right people to manage the initiative and hold them accountable in terms of tasks and deadlines.
- Ensure that all activities are evidence-based and that their impact is measured.
- Be as inclusive and diverse as possible in terms of those playing a key role in managing the initiative. This should not be donor led.
- Encourage open communication within the third sector and solicit their feedback. Be transparent. Transparency engenders trust.
- Be flexible and open to feedback and alternative ways of doing things.
- Ensure that the broader community understands the important role that the third sector plays in Bermuda. This will help the third sector to obtain the respect and support that it deserves.
- Start to articulate the initiative in a way that speaks to something more than the third sector working better together. The key message should better encompass the full scope of the initiative, such as “developing frameworks that can strengthen the third sector”.
- The message should not communicate that the third sector is not currently working. It should communicate that we are “taking it to another level!”.

Selected Verbatim Responses:

- *“The COVID response proved that all the Third Sector working together can provide a tremendous response to those in need and we can now take this to the next level.”*
- *“Find the right people to lead this and hold the advisory committee accountable. Be data informed in terms of how progress and success is measured. Make sure you keep us updated about what is going on so that we remain engaged and understand how this will benefit us. Thank you!”*
- *“It cannot be donor or funder led. That is what everyone feels right now. It has to be reflective of that collaborative piece that we’ve been talking about between non-profits, donors, Government and other Third Sector stakeholders. It must be driven by a trusted effort and transparent and inclusive method. Communication about every stage of the process is critical.”*
- *“I have been through a lot of change processes in organisations and “transparency engenders trust”. To be successful, there needs to be open feedback channels that allow people to ask questions and offer their opinions and to influence outcomes. You also want to provide opportunities where the different stakeholders can engage in a conversation about things and discuss their thoughts, ideas and concerns.”*
- *“I am grateful and full of gratitude that those who are leading this effort have chosen to do it because it needs to be done. In order for it to be successful, it needs to be done radically differently and with the statement in mind that culture will eat strategy for breakfast every time. If you are not mindful of the culture of Bermuda that needs to feel empowered and supported and respected, then it won’t be successful at all. I believe that it will be successful with the right ingredients.”*
- *“Ensuring a participatory approach where non-profits are at the forefront of it, but that also communicates through the process the need for capacity building so that the other stakeholders, in particular donors and the Government understand not just the importance of the third sector, but the importance of building its capacity. Given that the Centre for Philanthropy closed and it was the backbone to the third sector, what can replace it and*

exceed it versus it just being about how the third sector works together. It is often communicated in a way that it is about how we work together but we could be working perfectly well together but there may still be something else that needs to happen to strengthen the capacity. So how do you make it greater than the sum of its parts and so it is looking at frameworks that can help strengthen the third sector versus just working together more effectively. There is just something about the way that it is currently communicated that doesn't capture the fullness of what I think this will create which is that lifting up versus bringing us together."

- "I would encourage people to think broadly, be as inclusive as they possibly can be in respecting opinion and diversity, but equally knowing that Bermuda punches well above its weight. Some small things here are going to lead to big change. You are going to need some real passion and momentum in a room and go for it. I think of my experience with the third sector in a larger country that is more starved of resources, and I think that Bermuda has everything going for it. It just needs the right people around the table, the opportunity is there. There is some amazing work going on, it is quite incredible what gets done. I don't think the message should be that it isn't working, so that is something that they will have to be careful with. It is more about taking it to another level!"
- "The third sector is an unknown entity within the context of Bermuda. It is in the background of making sure that the country works or is moving forward. It is essential for helping our people to be the best that they can be, and helping our people to be whole, but it lacks the respect that it should receive because it is in the background. I honestly believe that by bringing itself out into the open more, really promoting the role that it plays in helping our people to be the best that they can be, will ensure positive outcomes in terms of the role that it plays."
- "I worry that trying to have a holistic comprehensive strategy for the whole is actually going to be a bridge too far. I would be inclined to break it up and talk about what the building blocks are of a healthy third sector, and then go to work on those things because if you envision a future state that is perfectly crafted around the needs and interests of all stakeholders and then you have a global pandemic or life changes in some fundamental way, these are dramatically different contexts that this perfect state envisioned outcome is now trying to survive. I think that you have to focus on what makes a resilient third sector, what are the skills and capabilities that are required in order to do that. And I would focus on building those capacities and make this a much more living process over time and then I would try to come up with a definition of a perfect third sector for Bermuda because I just don't think that it is realistic."
- "Lose the red tape, the more structured and rigid that it becomes, the less people want to participate. Keep it diverse, go as diverse as you possibly can. That has to be first and foremost, and again it is age, thought, occupation, it is everything that you can possibly imagine when I say diverse. Keep it inclusive. Make everybody that is a part of this feel like they are heard. Be as open to thought as you can be."
- "Do it quick, do it efficiently, and remove all aspects of ego from your decision making. I would say that they have done a great job of servicing Bermuda and if they work together, I am sure that they will be able to continue to meet the ever-changing needs of our community."
- "This is going to require someone to fund it. It is going to need a medium to long term funding commitment for it to be successful so it needs to be framed in an evidenced-based way which I think you are doing. Whoever is directing this also needs to be open to alternative points of view. There are always dominant voices but some of the best ideas can come from people who are not operating on the front line. Giving all stakeholders a voice will help them to feel engaged by the process and make them more likely to benefit from it."
- "I would like for the third sector to truly understand the pressing needs of the community, and in doing so, we will see a new and improved Bermuda community. The third sector cannot continue to reach out to those who continue to receive, but to reach out to all stakeholders in the process of making Bermuda a better place to live in. And hopefully, at some point in our lives we will finally reach out to our grass root people who need more help than anything, and understand that we are not all the same, but there are others who need to benefit from the third sector that we are not reaching out to."

## References

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