

Reimagining the BDA Third Sector

“Phase I Summary Report”

June 2021



The Effort to Reimagine the BDA Third Sector

Bermuda's Third Sector (BDA Third Sector) exists to work on behalf of the country's residents. Over decades, countless leaders have strived to make progress in education, health, economic security, and many other areas. And countless residents can cite the life-changing effects of one or more programs, services, community groups, and public policies. Third Sector stakeholders have also strived over decades to further that impact by strengthening their own practices, collaboration, and use of data.

Over the past year, the dual-pandemic of COVID-19 and heightened awareness of systemic racism forced third sectors worldwide to address unprecedented challenges and operate in brand new ways. Third sectors also used this as an opportunity to reinvent themselves and shape a better future versus returning to the status quo. While celebrating their successes, third sector stakeholders are also highlighting long standing racial and other disparities, inequities in how opportunities, resources and barriers are distributed across communities, the significant role of systems in supporting or hindering success, and the need for more inclusive and equitable practices among third sector stakeholders themselves.

This global moment raised an opportunity for the BDA Third Sector to *transform* how it approaches its purpose from the ground up. 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 also to "reimagine" what it looks like in the future, i.e. adopt radical inclusivity, revisit who sits at which tables and in which roles, question all assumptions, tackle the root causes of long-standing issues, pursue new ideas, address underlying power dynamics, and work together in new ways.

In the spirit of the growing mantra "never let a crisis go to waste," funding was provided by the Centennial Bermuda Foundation and Bermuda Community Foundation to sponsor the Reimagining effort's first *Exploration* phase. Phase I: Exploration focused 80% on engaging BDA Third Sector stakeholders to shape what comes next (primary research) + 20% on providing learning from other third sectors and the BDA Third Sector's own strengthening experiences (secondary research). If stakeholders decide that this work should lead to action, the option for new funding will be sought to support a subsequent phase to enact what is lifted up via this first phase.

To begin embodying a new ethos, the Reimagining initiative has applied the following inclusive view of the BDA Third Sector's purpose and stakeholder groups, with the explicit intention of all groups working side-by-side as partners in this effort:

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

Who has a role in the BDA Third Sector:		
Nonprofit Organisations	Philanthropy	Government
<ul style="list-style-type: none"> • Direct service providers • Advocacy groups • Intermediaries: Network facilitators, consultants or providers of technical assistance to third sector stakeholders, evaluators, researchers, etc. • Civil society organisations including faith-based institutions, clubs, etc 	<ul style="list-style-type: none"> • Foundations (corporate, private, family, community) • Individual donors 	<ul style="list-style-type: none"> • BDA government agencies • Policymakers • Elected officials, • Public/civil servants

Phase I: Exploration (Nov 2021 to June 2022)

To ensure that the BDA Third Sector reimagining effort is inclusive and makes progress toward its broad ultimate end -- a Third Sector that maximizes its assets and is stronger for all of Bermuda -- **Phase I: Exploration** included the following activities:

- **Third Sector Stakeholder Engagement:** Open town halls (virtual) and online communication to provide updates and gather input
- **Review of BDA Third Sector Materials:** Comprehensive review of past major efforts to strengthen the BDA Third Sector, with materials representing survey and study data, program and organization mappings, convening and meeting notes, etc.
- **Secondary Research:** Review of a wide range of third sector approaches and models, evidence of effectiveness, and latest trends
- **Primary Research:** Individual interviews and broad survey of BDA Third Sector stakeholders to explore the feasibility of creating a third sector model encompassing tools and strengthening approaches that align with the current needs and purpose of the BDA Third Sector
- **Review Findings & Setup Phase II:** Results of the secondary and primary research presented to the BDA Third Sector community and used to shape Phase II

To inform what a *reimagined* BDA Third Sector looks like - which builds on its greatest assets, addresses pain points, incorporates the best lessons from third sectors globally, learns from its own lessons to date, and embraces local vision and innovation - the research aimed to answer the following learning questions:

Secondary Research	Primary Research
<ul style="list-style-type: none"> • What have been the major efforts to strengthen the BDA Third Sector to date? What worked well, what progress was made, and what were the challenges? • What are major approaches to strengthening a third sector, and how do they work? What private and public sector approaches could add value? • What do the various approaches do well? Where do they fall short? • How are third sectors seeing the next big opportunities and need for progress? • What are the most important lessons to apply to a reimagined third sector in Bermuda? • What are the implications of the secondary research for the subsequent <i>primary</i> research phase of this process? 	<ul style="list-style-type: none"> • What should be the purpose of the BDA Third Sector and how well is it achieving its purpose? What transformative changes would help the BDA Third Sector better achieve its purpose? • What strengthen approaches, resources and tools would assist the BDA Third Sector with better serving the community? • What changes can be made to strengthen the working relationship between third sector stakeholders? • What type of leadership would be most effective for guiding next steps of the initiative? • What can be done to ensure that this initiative continues to be a success?

Phase I has produced the following **products**:

- Secondary research report: Click [here](#) to access the report
- BDA Third Sector stakeholder interview report: Click [here](#) to access the report
- BDA Third Sector stakeholder survey report: Click [here](#) to access the report

Phase I Insights and Takeaways

The BDA Third Sector strengthening experience to date

As a baseline for the secondary research, a comprehensive scan of 23 BDA Third Sector documents captured a long, rich history of efforts by numerous leaders and organisations to strengthen the sector’s work as a whole. The scan illustrates perspectives, data, insights, and recommendations coming out of these efforts in the following areas:

- Multiple variations of how the BDA Third Sector is defined, who is included, and roles
- Which, and how many, stakeholders are working in the Sector
- The priority issues and challenges to address
- What leadership of the BDA Third Sector should look like?
- The central role of racial equity, race relations and systems

Secondary Research Results: Advancing Transformation and Strengthening Approaches

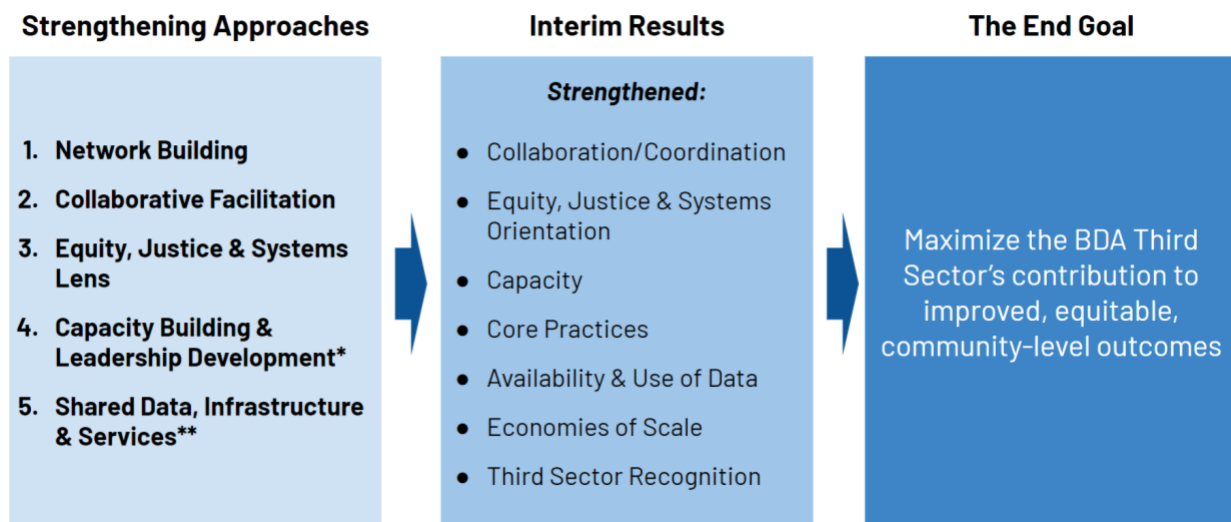
Building on this baseline scan, the secondary research on other jurisdictions reveals that as third sectors have grown in size, role, and sophistication over the past several decades, significant energy has been devoted to strengthening how they work. The private sector also holds potentially relevant models. These efforts can be classified into two categories: **a) advancing transformation and b) targeted strengthening**.

The dual-pandemic scenario has now expanded the call for **advancing transformation** that *reinvents* systems and how third sectors operate, versus solely piecemeal efforts that generate incremental improvements and may even perpetuate long-standing issues. The following trends stand out as ways in which expanded transformative energy is being channeled through the third sector and also the private sector.

- **Recognizing that where one grows up** shapes one’s opportunities and barriers
- Strengthening diversity, equity, and inclusion (DEI) within third sector practices
- **Centering equity and justice** in examining social issues (education, employment, health, income, wealth and other socio-economic disparities), naming root causes, and determining solutions.
- Aiming to **change systems** in addition to delivering program and service interventions
- Orienting third sector work around engaging and **building the capacity, power and influence of community members** who are most affected by the challenges that third sectors aim to address

Supporting and/or complementing the advancing transformation trends, a number of identified **targeted strengthening approaches** were identified that are designed to address a targeted problem, need or opportunity. Each shows wide variation in its intended results, what it looks like, and observed effectiveness when it is implemented. Also while the approaches are outlined separately, they are often combined in their design and implementation. Despite this variation, the research *does* indicate evidence of the tangible value that each strengthening approach can add through practical models that achieve narrowly defined, interim results.

The below diagram outlines five common strengthening approaches and the results they could aim to achieve for the BDA Third Sector.



*Potential capacity areas include: strategy, financial sustainability, measurement and evaluation, team and governance, programmatic practices, and many others

**Shared resources include services, physical facilities, office equipment and services, administrative functions, and others

The potential value of these strengthening approaches comes with an important caveat: they can often be promoted in an isolated manner and can be driven by individual stakeholder perceptions of third sector flaws that need “fixing” and/or the next silver bullet solution.

Stakeholder Engagement and Primary Research Results: BDA Third Sector stakeholder guidance and momentum

Through a combination of the individual interviews, Third Sector Community Stakeholder survey, and working sessions, third sector stakeholders provided significant input into the reimagining effort and where the third sector should go next. The top priorities are listed below and were supported by the stakeholder survey conducted with a representative sample of 92 BDA Third sector stakeholders.

Top priorities include:

- **Understanding community needs:** involve community members to explore disparities, the value of current third sector, e.g., review past surveys, new streamlined survey or other tools to gather more data
 - The stakeholder survey results showed that while almost all stakeholders believed that understanding the needs of the community was critical to the success of the third sector, three quarters of stakeholders struggled to secure meaningful data. To better meet the needs of the community, stakeholders expressed interest in having more access to statistically valid data that clearly highlights the needs of the community
- **Using an equity lens and changing systems:** understand and target root causes, increase focus on prevention, address prejudice, influence legislation
 - The stakeholder survey showed that almost all stakeholders felt that an equity and social justice approach was important for understanding the root causes of social problems in Bermuda and should influence how the BDA Third Sector operates
- **Increasing collaboration and coordination:** Address silos, more integrated approach
- **Improving services:** address basic needs, match services to needs, coordinate, streamline client intake
 - The stakeholder survey showed that close to 9 in 10 stakeholders (87%) saw benefits in collaborative project efforts, and 73% saw value in networking building organisations and initiatives. Collaboration was seen as useful for allowing organisations to work together more holistically to better meet community needs. Network building was seen as important for advocating on behalf of the third sector, providing training and educational opportunities and promoting relationship building.
- **Improving processes and efficiencies:** easier and more standardized grant applications, central grant opportunity listing, service/non – profit directory, other centralized info
 - The stakeholder survey results showed that over 7 in 10 stakeholders believed they could benefit from more access to managed Administrative Services such as IT support (85%), HR support (76%), Bookkeeping and Marketing support (both 74%); and Shared Data Platforms such as resources for researching grant applications (83%), a standardized system for completing grant applications (78%) and a standardized system for Government compliance reporting (75%).

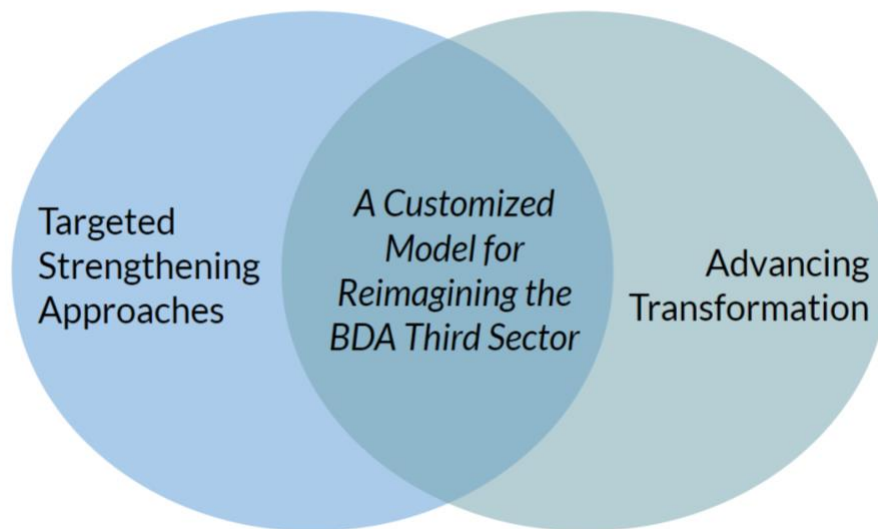
- **Providing the full range of strengthening approaches** and ensuring their accessibility to support third sector organizations
 - Using a scale of 0 to 10 where 10 is *Very important* and 0 is *Not at all important*, the stakeholder survey asked respondents to rate how important **greater availability or higher quality of various strengthening approaches** would be for a reimagined BDA Third Sector. All strengthening approaches were deemed important and achieved a mean rating greater than 8 out of 10: Capacity Building & Leadership Development (8.80/10), Shared Data and infrastructure services (8.74/10), Collaborative Facilitation (8.67/10), Initiatives for better operating with an Equity, Justice and Systems Change Lens (8.52/10) and Network Building (8.49/10).

While many shared priorities were named through the Phase I process, these also represent a wide range of possible efforts to follow up on. Stakeholder input has also revealed a *wide range of opinions* around what those priorities which differ based on the roles that stakeholders play.

In terms of any potential future of the reimagining effort that may follow Phase I, stakeholders cited the need for **unified, representative, inclusive, collective leadership of the third sector** to guide what may follow Phase I (e.g., steering committee, board of directors), while the full sector continues to own the reimagining effort. Stakeholders emphasized that this leadership would need to maintain a **high level of transparency and communication** in any follow up work. At the same time, there is also a range of opinions around what this leadership should actually look like and who should “own” or house the process.

The BDA Third Sector’s Transformative Opportunity

Bermuda’s Third Sector stakeholders have shown a clear, long-term commitment to achieving a Bermuda that works better for all. The latest circumstances have lifted up an opportunity to step back while looking ahead toward a stronger and more equitable future. Other third sectors and the BDA Third Sector’s own history of self-improvement efforts provide useful learning. While *advancing transformation* and *targeted strengthening* and are outlined as separate categories, they are not an either-or proposition. Approaches in both categories can work hand-in-hand and reinforce each other.



Moving Forward: Recommendations and Considerations

Based on the history of Bermuda's third sector strengthening efforts and the results of Phase I, the following are recommendations and considerations for moving forward.

1. **Keep moving:** Continue the work and build on the learning, momentum, and ethos of Phase I.
2. **Set up inclusive, representative leadership:** Set up a structure and process that reflects the broad diversity of the sector, allows for varying roles across stakeholders, supports decision-making and momentum along with collective sector-wide ownership, and ensures transparency and communication.
3. **Go macro before micro:** Lead with a big picture planning approach to set context and guide work around more specific priorities; starting the other way around may end up in a cycle of spinning wheels and not getting anywhere.
4. **Address the big decisions around priorities:** With more inclusive approach comes more varied situations, challenges, opinions and needs, which will need to be addressed accordingly.

However, third sector stakeholders decide to move forward from Phase I, longer-term success will be most likely if keeping in mind the following considerations that arose through the research.

- **Too many third sector self-improvement efforts approach their work backwards,** beginning with a silver bullet solution that goes looking for a problem to solve.
- **Bermuda has an opportunity to lead the way** by setting its own example and a new bar for what reimagining a third sector can look like, while building on its assets and self-improvement efforts to date.
- **Setting a leading example requires beginning with the *ultimate end in mind*,** honest recognition of what is getting in the way and the root causes of Bermuda's greatest community challenges, clear priorities, and rigorous hypothesis for how to address them.
- **Setting a leading example requires confirming the BDA Third Sector's collective purpose, stakeholders and roles** while addressing underlying dynamics, which would mirror sector

stakeholders' own calls for greater inclusivity, coherence, collaboration, sense of shared identity and community.

Options for Transitioning from Phase I

At the close of Phase I, the following represent distinct options for how to proceed with third sector leadership of the reimagining effort, including pros and cons for each option.

A) Options for Future Leadership

Option	Pros	Cons
1) Phase I concludes and Third Sector receive all final reports and recommendations	Third Sector community has been provided current BDA Third Sector data, key learnings, and recommendations to use at their discretion	Third Sector community may choose not to use data, reports, or key findings; may have limited capacity to drive further work
2) Ask existing third sector networks/groups to provide representatives	Leadership by existing groups that already represent 100+ third sector stakeholders	Existing groups may not represent full diversity of the third sector
3) Issue call for peer nominations, select a certain number of representatives with highest nominations	Known and respected third sector leaders will be identified	May not represent full diversity of the third sector
4) Intentionally recruit third sector representatives that reflect the diversity of the sector, based on democratically decided criteria	Diverse third sector representation	More involved process
5) Issue an open call for any/all third sector volunteers who wish to participate in a leadership role	Fewest barriers to participation	Unpredictable number and level of third sector representation; leadership structure may become unwieldy

B) Decision on Third-Party Support

For options 2-5 above, stakeholders also have an additional decision around what type of third-party facilitation or other support (if any) may be necessary to keep up momentum and move on the option successfully, and who should provide the support.