Reimagining the
BDA Third Sector

Phase I Final Summary

June 2021

Introductory Letter

Over a period of approximately seven months, more than 300 of you with a role in Bermuda's Third Sector (the BDA Third Sector) participated in what may be the most inclusive and collaborative strengthening effort in recent history.

Over the course of the 2020-2021 pandemic, the BDA Third Sector stepped up in its already vital role on behalf of Bermuda's communities. Seeing an opportunity in crisis, the Centennial Bermuda Foundation and Bermuda Community Foundation elected to sponsor a venue for all Third Sector stakeholders to explore what could come out of this opportunity.

While the effort began with a focus on researching established models that could help the sector become more efficient and effective, the work quickly evolved into what we now refer to as the Reimagining the BDA Third Sector initiative. The initiative expanded beyond common technical solutions to literally reimagine what the future of the sector can look like. This visioning mirrors a pattern across third sectors worldwide that have used the pandemic crisis as a moment to setup for a better future versus returning to the status quo. Inherent to this reimagining is a shared understanding of the systemic root causes behind disparities in opportunities and outcomes, greater prioritization of approaches that are powerful enough to address those root causes and strengthened collaboration to make those approaches happen.

While the conversation involved envisioning a new future, the effort also sought to reinforce just how critical the purpose and value of the BDA Third Sector is. As is common for third sectors worldwide, this value is not always fully recognized outside the sector, which can be reflected in prevailing narratives around the sector's role and the communities it serves. These narratives can also be reflected in outside parties promoting silver-bullet solutions to "fix" what are viewed (explicitly or implicitly) as various third sector shortcomings. We see the Reimagining effort as shining a light on what truly needs to be addressed (i.e., the root causes) for Bermuda's communities, and the Third Sector's vital role in doing so.

We were honored and humbled to co-lead the Reimagining effort's Phase I: Exploration. In this phase's final stakeholder working session held on June 23rd, we were encouraged to see nearly 100% of participants elect to build on the current momentum and collaboration and carry the effort into a next phase of work. As the BDA Third Sector moves forward in its journey, we encourage you to review the significant information and insights generated by the secondary and primary research that reflects the views and contributions of the hundreds of you who participated. This summary report captures the full essence of Phase I and includes links to the several in-depth reports produced over this phase. We hope that this work sets the stage for a new level of collaboration to collectively reimagine the future of the BDA Third Sector in service of all Bermuda residents, and believe the sector has an opportunity to lead the way in demonstrating what this can look like.

Anand Dholakia   Leslie Steede
Principal Associate, Community Science   Principal, Global Research

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 have also been 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). The intent was to seek new funding if stakeholders decide on the need for a subsequent phase to enact what was lifted up via this first phase.

To begin embodying a new ethos, the Reimagining initiative applied an inclusive view of the BDA Third Sector's purpose and which stakeholder groups have a role in achieving that purpose, with the explicit intention of all groups working side-by-side as partners in this effort (see table below). **In what is likely the most inclusive, interactive, and collaborative strengthening effort in the BDA Third Sector's history, more than 300 stakeholders reflecting these groups participated in the Reimagining initiative.**

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**
- 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	- Foundations (corporate, private, family, community) - Individual donors	- BDA government agencies - Policymakers - Elected officials, - Public/civil servants

Phase I: Exploration (Nov 2020 to June 2021)

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
- 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 *primary* research phase of this process?	- 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
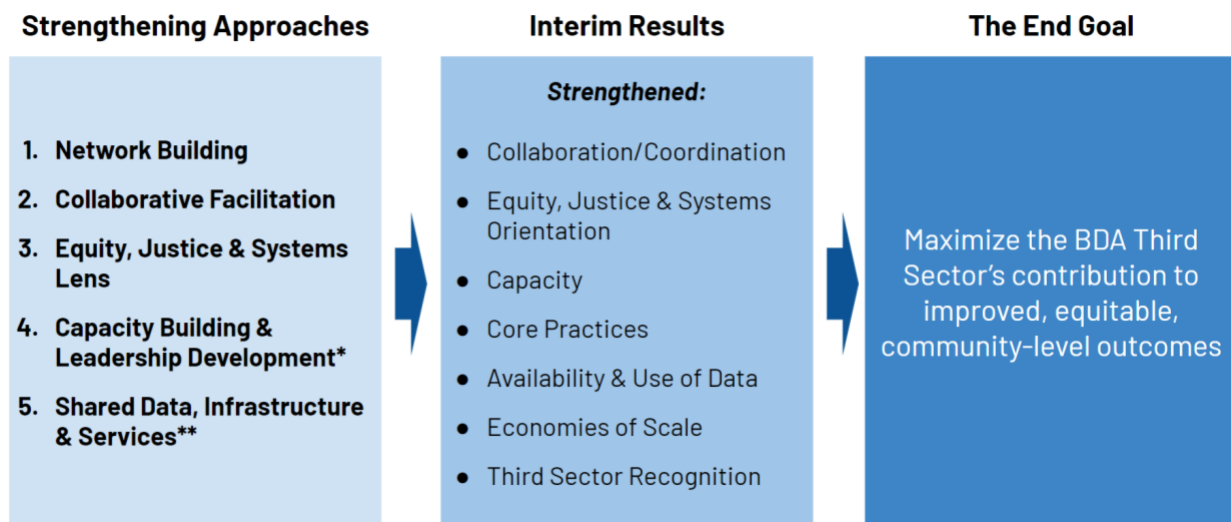
Building on this baseline scan, the secondary research on other jurisdictions reveals that as third sectors have grown in size, role, and sophistication over the past several decades, significant energy has been devoted to strengthening how they work. The private sector also holds potentially relevant 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.

Strengthening Approaches	Interim Results	The End Goal
1. Network Building 2. Collaborative Facilitation 3. Equity, Justice & Systems Lens 4. Capacity Building & Leadership Development* 5. Shared Data, Infrastructure & Services**	**Strengthened:** ● Collaboration/Coordination ● Equity, Justice & Systems Orientation ● Capacity ● Core Practices ● Availability & Use of Data ● Economies of Scale ● Third Sector Recognition	Maximize the BDA Third Sector's contribution to improved, equitable, community-level outcomes

*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, a 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 and the value of the current third sector, e.g., review past surveys, new streamlined surveys 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
  - *As a part of the stakeholder survey, Respondents rated the importance of an equity and social just approach for understanding the needs of the community on a scale of 0 to 10 (0 = not at all important; 10 = very important). The mean rating was 9.09 out of 10 demonstrating that it was perceived as very important. Additionally, 92% believed that an equity and social justice approach was important for understanding the root causes of the social problems that Bermuda's community faces, and 84% agreed that an equity and social justice should influence how third sector organisations design and provide services.*
- **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
  - o *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 also revealed a wide range of opinions around what those priorities should be and the different roles that different stakeholders can 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* 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.
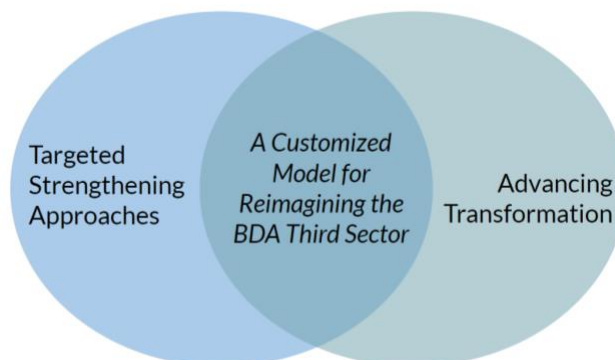
The following diagram illustrates one way of framing what this combined approach can look like and how the various strategic priorities would relate to each other.
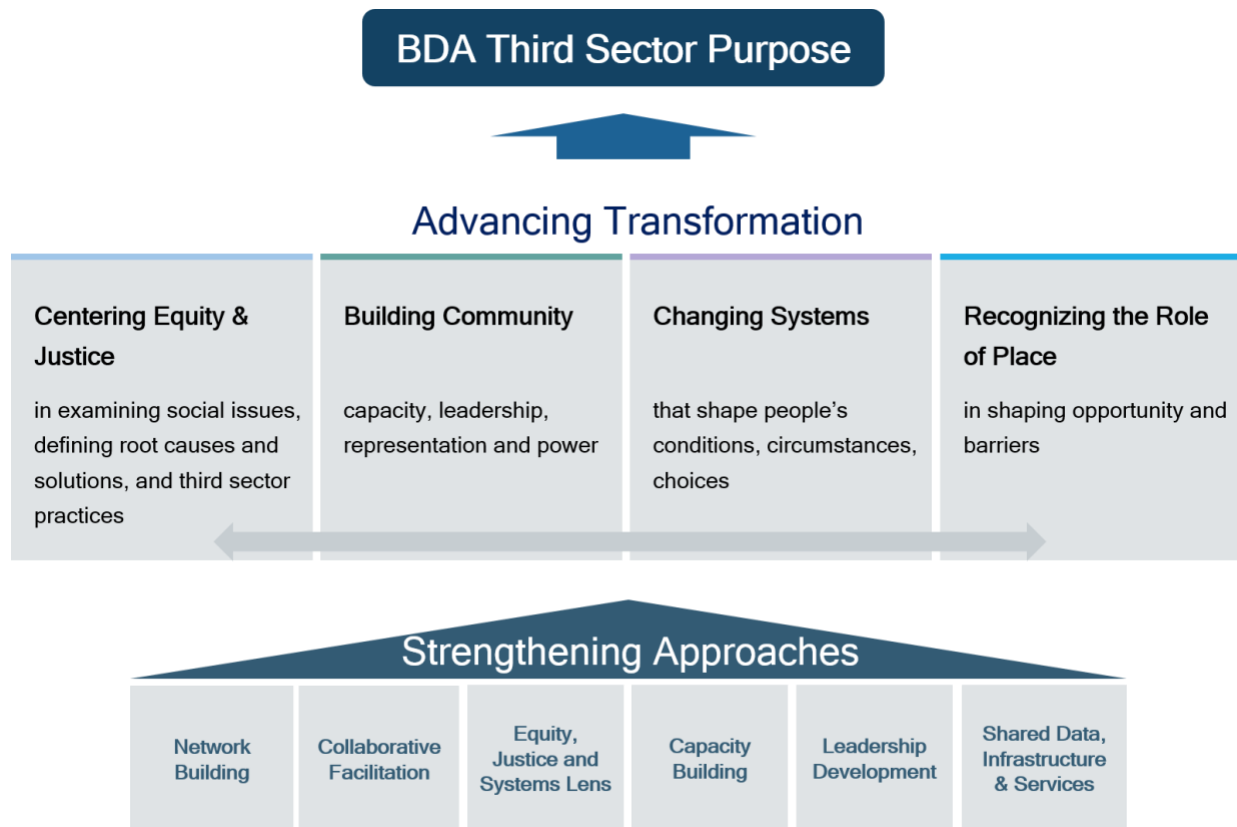
Transitioning from Phase I: What Comes Next

On June 23rd, 61 BDA Third Sector stakeholders attended the final working session of Phase I of the Reimagining initiative. After reviewing the final results, stakeholders were offered a number of options for what should come next. Through a full group polling exercise, session attendees weighed in on the following three decisions:

Decision 1: Should the third sector continue and build on the current reimagining effort? (Yes/No)

Poll Results: Yes (98%); No (2%)

Decision 2 (if yes to #1): Which leadership path should the Bermuda third sector use to follow on this effort?

Option	Pros	Cons
1) 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
2) Issue call for peer nominations, select those with the highest nominations	Known and respected third sector leaders will be identified	May not represent full diversity of the third sector
3) Recruit third sector representatives that reflect diversity of the sector, based on shared criteria	Diverse third sector representation	More involved process
4) 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

Poll Results: Option 1 (18%); Option 2 (18%); Option 3 (50%); Option 4 (14%)

Decision 3: Should an independent facilitator or project leader support this process (the option selected in #2)? (Yes/No)

Poll Results: Yes (83%); No (17%)

Based on the polling results, working session participants overwhelmingly elected to continue the Reimagining effort, building on the results of Phase I, and to include a neutral, third-party facilitator or project leader to support the next phase. While the majority of stakeholders selected Option 3 for what leadership should look in the next phase of work, the polling results here were more mixed. Participants dug further into this decision through small group conversations and discussed the possibility of a hybrid approach that combines one or more options with Option 3. A central concern was the need for leadership to be representative of the diversity of the Third Sector, equitable in that representation, transparent, and "neutral" to the extent possible while representing various stakeholder interests. Any follow-on work would need to include explicit work to define this leadership path.

Conclusion: Recommendations and Considerations for Moving Forward

Phase I of the Reimagining the BDA Third Sector initiative resulted in a new level of knowledge and momentum to help shape where the sector goes next in achieving its purpose on behalf of Bermuda communities. Partly thanks to virtual meeting methods becoming far more accessible and commonplace

over the past year, the process was likely the most inclusive, engaging and collaborative of major strengthening efforts in the BDA Third Sector's recent history. 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 strategic priorities:** With a 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 more likely be accomplished by keeping in mind the following considerations that arose through the research.

- **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 keeping in mind the *ultimate end* of equitable opportunity and lifelong success for all Bermuda residents**, honest recognition of what is getting in the way and the root causes to address, and clear strategic priorities and a 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.