

**Nonprofit
Alliance**
OF BERMUDA



Strategic Plan

2023-2027

Approved by the Board of Directors
on September 11, 2023

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Official Authorisation of Strategic Plan

The undersigned hereby specifies that we have reviewed the Strategic Plan and will support it as the official and current Plan for the Nonprofit Alliance of Bermuda for the period September 2023 to June 2027.



Dr Sandy De Silva, PsyD
Chair

Date:
September 11th, 2023



Jevon Williams (Sep 19, 2023 11:14 ADT)

Jevon Williams
Vice Chair

Date:
September 11th, 2023



Dr Nicola Paugh
Executive Director

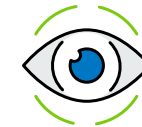
Date:
September 11th, 2023

Executive Summary

Impact Statement

Bermuda's nonprofits are tackling some of the most challenging issues in our community while facing constrained resources and capabilities. This makes it difficult for them to invest in their people, processes, and programmes in the way that is needed to grow and sustain their community impact.

The Nonprofit Alliance of Bermuda is a support system and capacity builder for Bermuda's nonprofits. We strengthen and unify nonprofits by providing services, programmes and resources - and advocate and champion their work. We do this because we know with a strong and connected nonprofit sector, we can build a better Bermuda.



Vision

A just, equitable and thriving Bermuda with a strong and connected nonprofit sector.



Mission

To strengthen and unify nonprofits to meet the needs of Bermuda's communities.



Values (PROPEL)

- **Purpose:** We strive for relevance, acting with intention and determination in all we do
- **Respect:** We work to earn the trust of our community, and act with integrity, authenticity and transparency
- **Optimism:** We approach our work boldly, confident that our people, our partners, and the sector can achieve a just and equitable Bermuda
- **Partnership:** We work collaboratively and with humility, seeing ourselves as equals in our commitment to achieve change
- **Excellence:** We are committed to the highest standards in our services, operations and relationships
- **Learning Organisation:** We prioritize knowledge, innovation and growth in every facet of our culture and work

Strategic Priorities



Impact: Refine and scale strengthening and unifying services that have an impact

- **Capacity Building:** Provide high quality training and consulting services that develop nonprofit organisations and their workforce
- **Collaboration:** Facilitate collective work and relationship building that makes a difference
- **Coordination:** Offer access to information and resources that creates efficiencies and economies of scale for the sector
- **Champion:** Advocate for the sector to increase support for and sustainability of nonprofits



Brand: Build a strong Nonprofit Alliance Brand with public recognition of and support for the mission

- Build a cohesive brand identity that elevates the messaging and brand visibility
- Invest in marketing to tell our stories, including a refreshed website and collateral materials
- Increase public awareness through community outreach, digital strategies and media engagement
- Track, measure and communicate our outcome data to promote our impact



Revenue: Manage finances and fund development with the highest standards that place sustainability at the center of our decision making

- Using our refreshed identity, find, cultivate and steward donors wanting to invest in an elevated approach to impacting their community
- Develop a fund development plan and financing model tied to strategic objectives with the goal of diversifying and growing revenues
- Consider a State of the Sector convening to showcase the sector and our impact on it
- Update membership tiers to reflect new offerings and value for nonprofits
- Create an equitable pricing model that supports consulting and other more intensive fees for service offerings



Operations & Culture: Build an organisational culture that drives efficient and effective performance and fosters empowerment

- Maintain a staff culture of empowering and passionate professionals who are positive and committed to following best practices and pursuit of excellence
- Build a human resource strategy that supports future growth, including upgrade of all job descriptions and compensation structures
- Upgrade technology to ensure it is user friendly and supports the growth of the organisation
- Prioritise talent management and development as a key process that is connected to our strategic priorities



Governance: Develop an exemplary Board of Directors with a strong and sustainable leadership pipeline

- Cultivate a diverse board whose members are diligent and supportive, contribute to fund development and act as ambassadors
- Ensure robust committees with well defined goals and actions tied to our strategic priorities
- Be accountable to organisation goals through a dashboard, performance measures and ongoing review of feedback
- Construct a succession plan for key roles
- Collaborate with other Management Support Organisations and capacity builders to identify and align with best practices

Introduction

A strong and connected nonprofit sector builds a better Bermuda. Yet, Bermuda's nonprofits are tackling some of our community's most entrenched and challenging issues while facing a constant constraint of resources and capabilities. These constraints make it difficult for them to invest in their people, processes, and programmes in the way that is needed to grow and sustain their community impact. The Nonprofit Alliance of Bermuda, formerly IAC, is dedicated to championing, strengthening, and unifying nonprofits in Bermuda.

Since its inception, IAC has promoted, strengthened, and advocated for best practice services and organisations to help them better impact the communities they serve. In 2020, the closure of the Centre on Philanthropy and the onset of COVID-19 was a catalyst for a rapidly shifting social sector environment. At the same time, IAC had entered a "start-up" development phase as a capacity-building organisation, with new resourcing and leadership needed to drive initiatives forward. Our research of capacity-building best practices, programmes, and trends demonstrated the value of shifting beyond general training to more intensive support. With this came the need to better define IAC's target client relative to our internal capacity and capabilities and to better focus on meeting the needs of the nonprofit sector in Bermuda. Our landscape analysis also showed us that it was essential for us to clarify our brand to improve public understanding of and support for our work.

This Strategic Plan tackles these challenges and clarifies the purpose and direction of the renamed Nonprofit Alliance of Bermuda. Our updated mission is to strengthen and unify nonprofits to meet the needs of Bermuda's communities. Our vision is a just, equitable, thriving Bermuda with a strong and connected nonprofit sector. Our refined impact strategy centres on the Four C's:

1. **Capacity Building:** Providing high-quality training and consulting services that develop nonprofit organisations and their workforce
2. **Coordination:** Offering access to information and resources that create efficiencies and economies of scale for the sector

3. **Collaboration:** Facilitating collective work and relationship building that makes a difference
4. **Champion:** Advocating for the sector to increase support for and sustainability of nonprofits

This plan was developed using a conventional approach to strategic planning, involving a situational analysis, review of organisational purpose, identification of strategic priorities, and the creation of supporting action and financial plans for the next three fiscal years. The planning process took place between March and August 2023.

As a result of our analysis, we have identified five strategic priorities:

1. **IMPACT:** Refine and scale strengthening and unifying services that have an impact
2. **BRAND:** Build a strong Nonprofit Alliance brand with public recognition of and support for the mission
3. **GOVERNANCE:** Develop an exemplary Board of Directors with a strong and sustainable leadership pipeline
4. **REVENUE:** Manage finances and fund development with the highest standards that place sustainability at the centre of our decision making
5. **OPERATIONS AND CULTURE:** Build an organisational culture that drives efficient and effective performance and fosters staff empowerment

Implementing these priorities will filter into the Nonprofit Alliance's Annual Action Plan. The Nonprofit Alliance Board of Directors will monitor the implementation of the Strategic Plan quarterly as a part of its standing board meeting agenda.

Given the rapidly changing external environment, there will likely be occasions where our Plan needs to be modified. The process is specified in the "Changing Our Plan" section.

Revision Page

Each revision to our Strategic Plan document will have a unique revision date in the new version. This page documents each of those revisions, including the date and the brief reason for the change.

Associated Documents

Internal Staff and Board Survey Report
Stakeholder Survey and Focus Group Report
Comparables Research Report

Revised Mission, Vision, Values, and Organisational Name

The strategic planning process resulted in updates to our mission, vision, values, and organisational name.

New Mission Statement

To strengthen and unify nonprofits to meet the needs of Bermuda's communities.

New Vision Statement

A just, equitable, and thriving Bermuda with a strong and connected nonprofit sector.

New Values

The Nonprofit Alliance operates by six values as it seeks to PROPEL the nonprofit sector forward:

- **Purpose:** We strive for relevance, acting with intention and determination in all we do.
- **Respect:** We work to earn the trust of our community and act with integrity, authenticity, and transparency.
- **Optimism:** We approach our work boldly, confident that our people, our partners, and the sector can achieve a just and equitable Bermuda.
- **Partnership:** We work collaboratively and with humility, seeing ourselves as equals in our commitment to achieve change.
- **Excellence:** We are committed to the highest standards in our services, operations, and relationships.
- **Learning Organisation:** We prioritize knowledge, innovation, and growth in every facet of our culture and work.

Name Change

Our consultative process reinforced the challenge IAC had experienced with brand confusion and mission-name misalignment. With the 2016 shift to a capacity-building mission, the IAC name no longer fit the evolving scope of our work. Donors, staff, board members, and clients mutually agreed that our name does not fully reflect what we do and is a barrier to the work of IAC. This misalignment presented an opportunity for synergy with an IAC collaborative, the Nonprofit Alliance of Bermuda, a group of nonprofit leaders committed to working collectively to improve the impact of nonprofits and champion their value in the community. The Nonprofit Alliance Advisory Committee was supportive, and we mutually agreed that the new name honours the grassroots origins of both IAC and the original Nonprofit Alliance collective, thus reducing duplication and confusion between the two entities.

These strategic shifts in name, mission, and focus will continue to build on IAC's founding commitment to developing robust services and organisations that better serve the community. Still, they provide greater focus and clarity as we move forward.

Positioning Our Organisation

Key Business We Are In

The Nonprofit Alliance of Bermuda is a nonprofit management service organisation (MSO) that supports nonprofits in Bermuda. We have become a vital support system and capacity builder for Bermuda’s nonprofit sector. We are a registered charity dedicated to strengthening, unifying, and championing all nonprofits in Bermuda. We aim to strengthen nonprofit leadership and organisations, foster sector relationship building and trust, advance collaboration and build overall sector impact and sustainability. We do this by providing training and consulting services, facilitating collaboration and network building, coordinating access to information and resources, and advocating for the sector. Our work is grounded in

Theory of Change



Strategic Priorities

The following strategic goals and objectives were prioritized for the next four years based on an internal assessment of strengths and weaknesses and an external assessment of needs, opportunities, and threats.

IMPACT: Refine and scale strengthening and unifying services that have an impact

- Provide high quality training and consulting services that develop nonprofit organisations and their workforce.
- Offer access to information and resources that create efficiencies and economies of scale for the sector.
- Facilitate collective work and relationship building that makes a difference.
- Advocate for the sector to increase support for and sustainability of nonprofits.

BRAND: Build a strong Nonprofit Alliance brand with public recognition of and support for the mission

- Build a cohesive brand identity that elevates the messaging and brand visibility.
- Invest in marketing to tell our stories, including a refreshed website and collateral materials.
- Increase public awareness through community outreach, digital strategies, and media engagement.
- Track, measure, and communicate our outcome data to promote our impact.

GOVERNANCE: Develop an exemplary Board of Directors with a strong and sustainable leadership pipeline

- Cultivate a diverse board whose members are diligent and supportive, contribute to fund development, and act as ambassadors.
- Ensure robust committees with well defined goals and actions tied to our strategic priorities.
- Be accountable to organisation goals through a dashboard, performance measures, and ongoing review of feedback.
- Construct a succession plan for key roles.
- Collaborate with other Management Support Organisations and capacity builders to identify and align with best practices.

REVENUE: Manage finances and fund development with the highest standards that place sustainability at the centre of our decision making

- Using our refreshed identity, find, cultivate and steward donors wanting an elevated approach to impact their communities.
- Develop a fund development plan and financing model tied to strategic objectives that will diversify and grow revenues.
- Consider a State of the sector convening to showcase the sector and our impact on it.
- Update membership tiers to reflect new offerings and value for nonprofits.
- Create an equitable pricing model that supports consulting and other more intensive fee for service offerings.

OPERATIONS AND CULTURE: Build an organisational culture that drives efficient and effective performance and fosters staff empowerment

- Maintain a staff culture of passionate and empowering professionals who are positive and committed to following best practices and pursuit of excellence.
- Build a human resource strategy that supports future growth, including an upgrade of all job descriptions and compensation structures.
- Upgrade technology to ensure it is user-friendly and supports the growth of the organization.
- Prioritize talent management and development as a key process that is connected to our strategic priorities.

Monitoring, Communicating, and Updating Our Plan

Monitoring the Implementation of Our Plan

Responsibility	Tool Used to Monitor	Frequency
Executive Director	Quarterly Board Report	Quarterly

Communicating Our Plan

Stakeholder Group	What to Communicate	How to Communicate
Donors	Full Report & Budget	Email/Presentation
Members & Nonprofits	Full Report	Email/Presentation
Government Partners	Full Report & Budget	Email
General Public	Summary Plan	Website

Changing Our Plan

Given the rapidly changing external environment, the Nonprofit Alliance anticipates that the need to update the strategic plan may arise. The need to adjust the plan will be raised to the Executive Director, who will present a proposed amendment to the Nonprofit Alliance’s Executive Committee. The Executive Committee will decide if the proposed amendment will be submitted to the board for approval. If there is an agreement to proposed amendments, these will be provided to the board in their regular board meeting packet in the format of tracked changes to the existing plan. Once amendments have been board approved, the version date of the final document will be modified, and the plan will be recirculated to key stakeholder groups.

Appendices

Appendix A: Process Used to Develop Our Strategic Plan

IAC followed a conventional approach to strategic planning. This was feasible because we have board and staff commitment to a comprehensive and robust process, given the growth stage of IAC. The approach used the following phases:

1. **Situational Analysis:** The Nonprofit Alliance examined its internal and external environments, engaging in stakeholder consultation noted in Appendix B.
2. **Clarification of Purpose:** The Nonprofit Alliance updated its mission, vision, values, and name.
3. **Identification of Strategic Goals and Objectives:** The Nonprofit Alliance considered the data gathered in the situational analysis to identify five priority goals.
4. **Creation of Success Indicators:** For each objective, the Nonprofit Alliance established the desired result that will be achieved in accomplishing those objectives.
5. **Creation of Action Plans:** The Nonprofit Alliance updated its current Annual Plan to align with the new strategic priorities. It will establish an updated Annual Plan to support plan implementation ahead of each new fiscal year.
6. **Creation of Financial Plan:** The Nonprofit Alliance will finalize a three-year budget and fund development plan to support the growth required between 2024 and 2027.
7. **Final Document:** IAC summarized the process and findings in this Strategic Plan document.
8. **Monitoring and Evaluation Plan:** IAC mapped out its plan for monitoring and evaluating plan implementation and adaptation.

Appendix B: Stakeholder Consultation

Between March and June 2023, IAC worked with Social Impact Architects to engage stakeholders in our planning process. We used a range of methods to engage stakeholders in our future direction, including:

1. **Internal Staff and Board Survey:** 17 board and staff members were invited to complete an internal survey on our strengths and weaknesses, with 16 (94%) completing the survey.
2. **Stakeholder Survey:** 160 nonprofits were invited to complete a survey on their needs and perception of our strengths and weaknesses, with 47 (29%) completing the survey.
3. **Focus Groups and Interviews:** We coordinated three focus groups and one interview to discuss survey findings in more detail. Seventeen nonprofit leaders participated in a focus group on May 24th. Two donors attended a focus group on June 20th. The Charities Commission was scheduled to participate in a focus group on June 14th, but the focus group did not take place. An interview was held with the Bermuda National Standards Committee on June 12th.
4. **Comparable Research:** 14 other nonprofit MSOs were reviewed for best practices.

**Nonprofit
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