



## PROPEL Programme

### *Accelerating Nonprofits to Build a Better Bermuda*

A strong and connected nonprofit sector builds a better Bermuda. Donors want to invest in well-run nonprofit organisations, confident that their funds will have community impact.

The **PROPEL Programme** is a nonprofit accelerator programme that helps nonprofits develop best practice standards, define long term strategy, and build mechanisms toward sustainable financial health. It gives nonprofits and their supporters the confidence of knowing they are maturing to better execute, scale and sustain their community impact.



## What PROPEL does for you, the nonprofit?

1. Gives you a robust self-assessment of your organisation
2. Guides you in developing and aligning your Board on a 3-year strategy
3. Supports you in developing best practice policies and procedures
4. Gets you ready for the BNSC certification process
5. Improves your chances of meeting your fund development targets
6. Provides you with a dedicated and experienced nonprofit coach
7. Creates opportunities for you to build deeper connections with your nonprofit peers

## What PROPEL does for the nonprofit sector?

- 1) Improves sector wide nonprofit standards of practice
- 2) Strengthens the nonprofit sector's ability to impact the community

## How will we know?

1. PROPEL participants will successfully become BNSC Certified or Accredited within two years of programme completion
2. PROPEL participants will advance in their lifecycle phase of development, demonstrating an increased ability to execute on their missions or deciding to proactively and strategically wind-down

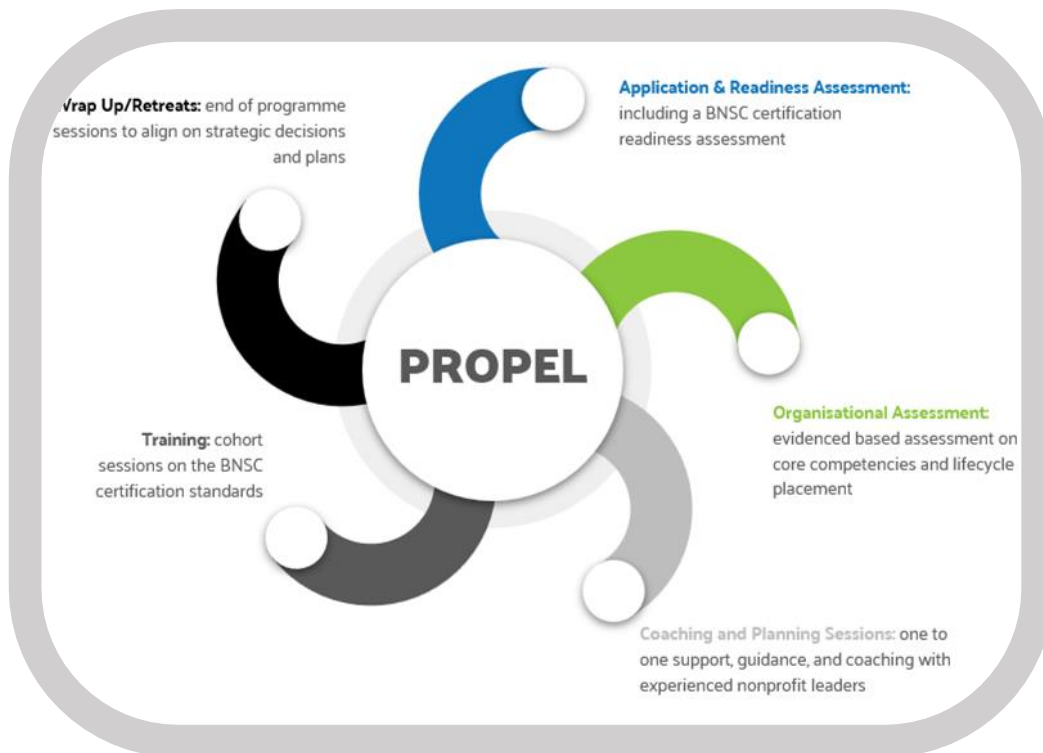
\*Not all organizations who participate in Readiness or Accelerator may find continuing operations to be in the best interest of the organization or the community. For those, the PROPEL programme includes support in developing the wind-down approach.

## Programme Design

1. **PROPEL Readiness:** A 1-year programme for nonprofits in a start-up or decline phase of development aiming to achieve stabilisation, build baseline best practices, and establish next steps, whether moving into PROPEL Accelerator programme readiness or strategically deciding to winddown).
2. **PROPEL Accelerator:** A 2-year programme for nonprofits in their adolescent or mature phase of development to strengthen organisational strategy, build best practices, and achieve readiness to demonstrate BSNC certification standards.

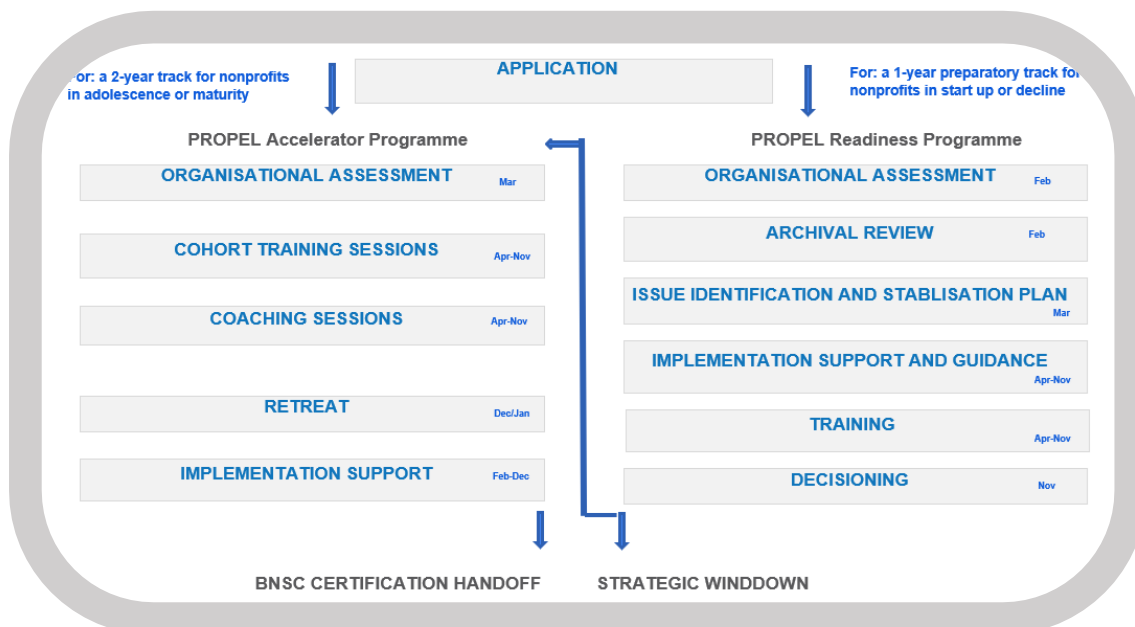
## PROPEL Programme Components

The PROPEL Programme is comprised of five components:



## PROPEL Programme Design

The PROPEL Programme has two programme tracks: a core Accelerator Programme and an additional preparatory Readiness Programme:



# TRAINING SESSION CURRICULUM

These sessions will take place the 3<sup>rd</sup> Tuesday of each month from 9am to 3pm at the Bermuda Health Council.

## MARCH 19: Kick Off

- 1) Programme overview
- 2) Introductions
- 3) Understanding and using your Organisational Assessment and Application responses

## APRIL 16: Governance

- 1) The importance of the mission
- 2) The role and importance of strategic and annual planning
- 3) The role of the organisation in community engagement and advocacy
- 4) The key roles of the Board
- 5) The role of Executive Director and their relationship with the Board
- 6) How to protect reporters of suspected misconduct and against conflicts of interest

## MAY 21: Risk Prevention and Management

- 1) Process for annually reviewing compliance with applicable laws and regulations
- 2) Risk prevention and management best practices
- 3) Process for appropriate insurance protection
- 4) Technology and information management best practices
- 5) High level concepts around privacy and security best practices
- 6) Risk management practices relative to contracts, contractors and service agreements

## JUNE 18- Financial Management

- 1) The Governing body's key financial responsibilities
- 2) Key internal controls and financial management systems
- 3) Importance of diverse sources of revenue and proper management of investments.
- 4) Effective financial planning and monitoring
- 5) Key considerations for an ethical, fiscally-responsible fund development function.

## JULY 16: Performance Quality Improvement

- 1) What is PQI system and why it is important
- 2) What an effective PQI system should include
- 3) The role of programme logic or theory of change, including outcomes and indicators, in PQI
- 4) Data collection, aggregations, analysis, and maintenance process

## AUGUST 20: Client Rights

- 1) Why and how to protect the legal and ethical rights of clients
- 2) How to conduct ethical human subject research

## SEPTEMBER 17: Human Resources

- 1) How and why an organisation should assess its workforce annually
- 2) Appropriate recruitment and selection methods
- 3) Methods for tracking and enhancing satisfaction and retention
- 4) Effective performance review processes
- 5) Structures for personnel record maintenance
- 6) Best practices for recruiting, retaining and managing volunteers
- 7) Best practices for contracting of consultants and contractors

## OCTOBER 15: Administrative and Service Environment

- 1) Health and Safety Act Compliance
- 2) Promoting the dignity of personnel in the service delivery environment
- 3) Ensuring accessible service and administrative facilities are accessible
- 4) Facilities safety and security measures
- 5) Processes for planning and coordinating emergency response preparedness

## NOVEMBER 19: Building Your Brand and Wrap Up

- 1) Promoting the organisation's mission and impact as a clear and consistent brand
- 2) Key programme insights and next steps

## ELIGIBILITY FOR THE ACCELERATOR TRACK

**Middle-Stage:** The PROPEL Accelerator track focuses on Bermuda registered charities who have progressed beyond start up and who are focused on growth through core programme and infrastructure development. We find this most often in organisations that are in their early *adolescent* phase with: 1 – 10 years of operating history, 2 – 10 staff members, an annual budget between \$100K and \$1M and baseline internal processes established

**Address Priority Issues:** The PROPEL Accelerator track is open to all nonprofits but prioritizes organisations whose missions address Bermuda’s priority social safety net supports, as indicated by the pursuit of Vital Signs Outcome Areas. See <https://bermudavitalsigns.org/>

**High-Potential:** The PROPEL Accelerator track focuses on organisations with:

- A paid Executive Director, or ED-equivalent
- A functioning Board, with an active Board Chair and Treasurer
- Programme model demonstrating baseline logic, with evidence of programme evaluation taking place.

**Committed:** The PROPEL Accelerator track requires that organisations have:

- An Executive Director willing to participate in all aspects of the programme, including a commitment to mentor future participants for a 1-year period
- Relevant staff and /or Board members willing to join sessions related to their areas of responsibility
- Management Team and Board willing to attend a 1-day Strategy Retreat
- Board commitment to support as needed based on Action and Strategic Plans developed

**Stake in the game:** A contribution of 25% or \$3,000 towards the programme investment in the nonprofit. A portion of this will go towards fully covering your BNSC certification fees.

**This fee will be waived for the pilot cohort in 2024.**

## ELIGIBILITY FOR THE READINESS TRACK

Not all organizations will be ready for the Accelerator track. PROPEL Readiness is a significantly more intensive track for organisations in decline, or in some cases in startup phase. This track will be available to organisations that are deemed critical by the Selection panel, where their absence will result in basic access to essential services no longer being available.

## APPLICATION PROCESS

An application process will be required, that will include an internal process checklist and questions to confirm eligibility requirements. This assessment will inform the selection and sorting process, and will also be used as a part of the programme. The application process itself is considered a capacity building exercise as it will serve as an internal tool to understand where internal process gaps exist. The application can be accessed through this link: <https://www.surveymonkey.com/r/QQ697R9>

## SELECTION AND SORTING PROCESS

The Application and Readiness Assessment will be used to select and sort applications into one of four categories

- 1) Level 1 Readiness participant
- 2) Level 2 Accelerator participant
- 3) Deferred (*ready but no capacity in this year's programme, deferred to future cohort*)
- 4) Not eligible (*not currently ready based on eligibility criteria. Action items will be suggested to support readiness for future cohort*)

The selection panel will consist of the core PROPEL Programme team

## TIMELINE

- Application Period: **November 10<sup>th</sup> to December 4<sup>th</sup>**
- Intake Announcements: **January 15<sup>th</sup> – 16<sup>th</sup>**
- **Readiness Programme: February through November**
  - February and March: Leadership team sessions
  - April through November: Monthly virtual one to one coaching sessions with Executive Director
  - December: Decisioning on next steps
- **Accelerator Programme:**
  - Core Programme Phase- **March through November 2024**
    - Monthly in person six-hour cohort session per month for Executive Director and relevant Board/Staff
    - Monthly one to one coaching sessions for Executive Director with Coach
  - Final Staff-Board Retreats- **December 2024 or January 2025**
  - Supported Implementation Phase – **February through December 2025**
    - One to one coaching sessions every other month

## What is BNSC Certification

### What is BSNC?

- The Bermuda National Standards Committee (BNSC) was established as a local, independent collection of nonprofit representatives, seeking best practice standards for their organisations, in 2005. In 2020, the BNSC became an internationally validated, locally registered nonprofit responsible for accrediting or certifying health and human serving organizations, in Bermuda.
- It seeks to improve and demonstrate the quality of services in Bermuda, for health and human service organisations, through public and private partnership.
- BNSC established Bermuda as the first country to formally replicate the North America based Council on Accreditation (COA)
- COA is widely recognized as one of the best human service accrediting organisations and provides international validation for BNSC Accreditation and Certification.

### What is Certification?

- A review process based on BNSC Standards of Excellence that cover governance, financial management, human resources, performance and quality improvement, risk prevention and management, administrative and service environment, and client rights.
- Demonstrates that an organisation provides high-quality services, ethically, and with the highest standards of care
- The standards guide organisations in developing best practices

### Value of Certification

- Endorses an organisation as having a high standard of practice, over and above the basic requirements of the Charities Act
- Gives nonprofits the confidence to know they are functioning in a way that enhances their ability to deliver on their mission over the long term
- Gives donors and the public confidence that nonprofits who achieve certification or accreditation are operating with best practices
- Shows a nonprofit transitioning to adolescence and maturity is doing so with integrity

## Q&A

**Is PROPEL right for me?** PROPEL is an intensive capacity building programme for nonprofits willing to invest considerable time in their growth and development over a two-to-three-year period (depending on programme track). The PROPEL Accelerator track is best suited for nonprofits in their adolescent phase (see page 4, paragraph 1), and the PROPEL Readiness track is designed for those requiring more support, who are potentially in decline or start-up phase. PROPEL is not a solution for organisations in full crisis (see below for description of crisis phase).

**What is the format?** Much of PROPEL will be delivered via virtual meetings, including the one-to-one coaching sessions. For the PROPEL Accelerator track, the cohort training sessions and the retreats will be in person.

**Who is the PROPEL Programme Team:** The Lead Programme Coaches are Dr. Claudette Fleming and Dr. Glenn Faries, with programme analysis and support provided by Shana Williams and Dr. Nicola Paugh. Dr. Tara Hines, BNSC's Executive Director, is the BNSC liaison to the programme and will be involved in the Selection Panel, but is not involved in PROPEL Programme delivery.

**What is the cost?** For the PROPEL Accelerator track there is a \$3,000 fee which reflects a 75% subsidy on the true cost of the programme. A portion of this will cover your future BNSC certification fees. There is NO fee associated with the PROPEL Readiness track, however there are stricter eligibility criteria. Those who complete the PROPEL Readiness track, and progress to the Accelerator will then be required to pay the fee for the PROPEL Accelerator track. **This fee will be waived for the pilot cohort in 2024.**

**How is PROPEL promoted?** The programme is promoted to all nonprofits in our database, and an open information session is held. The information session is also promoted on social media. Applications are open to any nonprofit interested in applying. For the PROPEL Readiness track, we may also conduct targeted outreach to organisations we believe could benefit from the intensive support, based on recommendations from key partners.

**What information is required in the application?** The organisation must provide information on the mission, problem statement, outcomes, clients served per year, current critical issues, projected expenses for the next fiscal year, number of FTE staff, and years in operation. You will also complete an internal process checklist. You must also submit your most recent financials as well as your programme logic model or Theory of Change.



**How are organisations selected?** Using the eligibility criteria listed for the PROPEL Accelerator track. If more eligible organisations apply than we have capacity for, we will defer organisations to future cohorts. We will consider factors such as outcomes measured and number of clients impacted when prioritizing. Organisations working towards Vital Signs outcomes (<https://bermudavitalsigns.org/>) will be prioritized, since these are evidenced-based community need priorities. For the Readiness track, organisations must make the case that they are providing a basic, critical and essential service whereby if their organisation ceases to exist, clear hardship would be experienced by the beneficiaries.

**What happens to those who are not eligible?** We seek to serve nonprofits in all phases of their lifecycle who are invested in their growth and development. If an organisation is not currently eligible, we provide an alternate recommended capacity building plan that will assist in progressing to eligibility or in making progress until the programme has capacity for your nonprofit.

**How do you know if your organisation is in crisis, where this programme may not be appropriate?** A nonprofit in crisis refers to a situation in which a nonprofit organisation is facing significant, often unexpected challenges that threaten its stability, sustainability, or ability to fulfill its mission. As a result of this instability, focused attention on general capacity building would not be appropriate as full attention must be placed on resolving the crisis issues. Nonprofit crises can take various forms and may result from internal or external factors.

**If my organisation is in crisis and PROPEL is not appropriate, what else can I do?** Depending on the nature of the crisis, there are different courses of action you can take:

- **Financial Distress:** An organisation's lack of financial capacity to sustain itself for the immediate future without a financial crisis appearing. This results in financial distress and can lead to budget deficits, inability to pay staff or bills, and the risk of insolvency. *A more appropriate course of action may be to focus on fund development and financial management, forming a taskforce of Board and staff to focus on this area for 6 months.*
- **Operational Challenges:** Nonprofits may face operational crises related to management issues, programme failures, or logistical breakdowns. These are challenges that severely disrupt the organisation's ability to deliver services effectively. *A more appropriate course of action may be to focus on identifying, addressing and resolving key breakdowns. The Board should lead this effort in partnership with Leadership.*
- **Reputation Damage:** Crises that damage the nonprofit's reputation can arise from scandals, mismanagement, or public controversies. A tarnished reputation can lead to a significant loss of trust from donors, beneficiaries, and stakeholders. *A more appropriate course of action may be to focus on resolving the damage to reputation that has occurred, with direct discussions with those who have lost trust.*

- Legal or Compliance Issues: Nonprofits can experience crises when they encounter legal problems, such as lawsuits, regulatory violations, or governance issues. These issues may result in legal actions, fines, or loss of charitable status. *A more appropriate course of action may be to seek legal assistance in resolving legal or regulatory issues.*
- Leadership Challenges: Leadership crises occur when there is a lack of effective leadership or deep conflicts among board members, executives, or staff. Poor leadership can hinder decision-making and lead to organisational dysfunction. *A more appropriate course of action may be for the Board to consider leadership transitions.*
- Crisis of Purpose: A nonprofit may face a crisis when its mission becomes unclear or when stakeholders question its relevance, indicated by significantly reduced client loads or programme participation. *A more appropriate course of action may be to consult with stakeholders to determine current need and align with new programme design.*
- Ethical Dilemmas: Ethical crises may emerge when the nonprofit confronts moral or ethical dilemmas related to its operations, beneficiaries, or funding sources. Failure to address these dilemmas can lead to a crisis of conscience. *A more appropriate course of action may be to address any ethical dilemmas through transparent and frank internal conversations.*