Addendum to the 2024 - 2027 Strategic Plan

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 registered charity that is dedicated to strengthening, unifying and championing nonprofits in Bermuda. We aim to strengthen nonprofit leaders, organisations, and the way they collaborate and work together. We do this by providing training and consulting services, facilitating collaboration and network building, and coordinating access to information and resources. We work to improve the community's perceptions of and engagement with nonprofits by advocating for a more sustainable nonprofit sector. Our work over the next four years is guided by our 2024 – 2027 Strategic Plan, with a supporting dashboard, service scale up plan, financial projections and organisational structure described in this document.

Our mission

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

Our vision

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

Evidence of Need

The Nonprofit Alliance's four year strategy and service scale up are designed to address eight barriers facing the nonprofit sector:

1	Increased Demand	Nonprofits qualitatively report that high demand increases from 2020 and 2021 have persisted. Collective food security service data show continued increases in demand for food aid into 2023, with new registrants in need of food support each month in Q1[1]. While basic Government financial assistance exists for those in need, nonprofits often fill gaps in the basic social safety net, while receiving very little Government funding compared to other developed country jurisdictions.
2	Financial Constraints	In the face of high service demands, nonprofits are fiscally challenged. In 2023, nonprofits rated fund development as their greatest area of challenge.[2] 2021 data showed that almost 60% of nonprofits did not meet their fund development targets[3]. Additionally, 2021 Registrar annual reporting data showed that 44% of registered charities reported an annual net loss and 61% of registered charities reported current assets of $100,000 or less.[4]
3	Employee Retention Challenges	2022 nonprofit workforce data showed that for many professional roles, Bermuda's nonprofit sector does not compete with public sector salaries.[5] Recruitment firms also indicate that the nonprofit sector is deemed low-paying and job-insecure. This presents a significant challenge in recruiting individuals with the capabilities to deliver effective services and lead well-run non-profit businesses.
4	Professional Development	2022 nonprofit workforce data also showed that 13% of Bermuda nonprofits have no budget allocated for professional development and a further 35% budget as little as between $100 and $500 per person.[6] Our 2023 nonprofit capacity assessment showed that only 38% of nonprofits implement formal professional development plans.[7]
5	Burnout	Many nonprofits provide critical human services, working and supporting vulnerable populations. They have the challenging yet critical job of supporting clients in overcoming adversity and achieving optimal life outcomes. As a result of the emotional exhaustive nature of the work, it is a field typified by high levels of burnout and attrition.[8]
6	Board Engagement & Development	Board engagement and development is a significant challenge in the sustaining and growth of nonprofits. Finding and keeping effective Board members with the necessary skills was identified by nonprofit leaders as their greatest challenge, outside of fund development.[9]
7	Under Developed Strategy	Some nonprofits have low understanding of what a sound strategic planning process should entail. When asked what the cost of a strategic planning process should be, many respondents from a focus group stated a range between $1,000 and $5,000.[10]While there is need for more accessible strategic planning for nonprofits, these responses reflect a lack of awareness of the true cost of planning.
8	Lack of Best Practices	Only 25 nonprofits are BNSC certified or accredited. This means that only 15% of registered charities with revenues over $35,000 are certified or accredited as demonstrating best practices.

[1] Food Security Working Group meeting minutes, 2023
[2] Nonprofit Capacity Survey, Social Impact Architects, 2023
[3] Wavecrest Philanthropy Survey, 2021
[4] Third Sector Financial Snapshot, Bermuda Foundation, 2021
[5] Nonprofit Workforce Survey, Nonprofit Alliance of Bermuda, 2022
[6] Nonprofit Workforce Survey, Nonprofit Alliance of Bermuda, 2022
[7] Nonprofit Capacity Survey, Social Impact Architects, 2023
[8] Brunstring, Sreckovic, M & Lane, 2014: doi:10.1353/etc.2014.0032
[9] Strategic Planning Nonprofit Focus Group, IAC, 2023
[10] Strategic Planning Nonprofit Focus Group, IAC, 2023

Dashboard

The Nonprofit Alliance's Board of Directors is guided by an organisational dashboard as it monitors strategic implementation:

IMPACT: Refine and scale services that make a difference
· 100% of staff and board believe Nonprofit Alliance is effective at achieving its mission
· 100% of members believe Nonprofit Alliance is effective at achieving its mission
Capacity Building: Providing high-quality & transformative training and consulting services that develops organisations and the nonprofit sector workforce
· 90% of 240 training participants show evidence of improved knowledge, skills, and confidence of participants
· 90% of 250 capacity building clients positively rate quality of services delivered by facilitators/ consultants
· 90% of members rate our services as meeting their training and development needs
· 90% of 8 nonprofits served annually progress in lifecycle & become BNSC certified OR strategically winddown
Coordination: Offering access to information and resources that creates economy of scale for the sector
· 90% of members rate us as assisting them with accessing relevant information and resources
· 5% increase in # of nonprofits who access more economical services as a result of group efforts
Collaboration: Facilitating collective work and relationship building that makes a difference
· 90% of collaborative participants from 3 groups that have positive scores on Wilder Collaboration assessment
· 90% of members that believe relationships/trust in the sector has improved as a result of the Nonprofit Alliance
Champion: Advocating for the sector to increase support for nonprofits
· 1 policy or process changes that benefits the sector
· Increased % of general public that trusts nonprofits
· 90% of members feel supported and valued as a result of the Nonprofit Alliance

BRAND: Build a strong Nonprofit Alliance Brand with public recognition of and support for the mission
· Increased % of general public that know of the Nonprofit Alliance
· Annual 10% increase in social media follower growth
· 85% of members are aware our services and feel engaged with the organisation
· 85% of donors are aware of our narrative (impact, our progress and our organisation)
GOVERNANCE: Develop a leading Board of Directors with a strong and sustainable leadership pipeline
· Average board meeting attendance rate of 90%
· Nonprofit Alliance meets or exceeds industry benchmark with Board comfort level of key Governance responsibilities
· 80% of board members who attend major fundraising/PR events
· 80% board members involved in committees
· Score of 1 for 80% or more of the BNSC scorecard ratings
· 100% of risks under active risk management
REVENUE: Manage finances and fund development with the highest standards that place sustainability at the center of our decision making
· Annual 5 -10% growth in number of donors
· Annual 5 -10% growth in total value of donations
· 90% donor retention rate
· 5 - 10% increase in the average revenue per donor
· Expenses on/below budget, and revenue on/ exceed budget
· Annual 5 -10% growth in total revenues
· Raise 50% of budget before start of fiscal year, and 100% by start of Q3
· Maintenance of 6 months reserves

OPERATIONS AND CULTURE: Build an organisational culture that drives efficient and effective performance and fosters staff satisfaction and growth
· 100% of staff and contractors with high satisfaction rates · Nonprofit Alliance meets or exceeds industry benchmark with Board and Staff satisfaction of key operational areas · Nonprofit Alliance meets or exceeds industry benchmark with Staff satisfaction of organisational culture · 90% of members that feel our technology platforms are user friendly and adequately support our work

Four Year Service Scale Up Plan

The Nonprofit Alliance plans to scale up to deliver a wide range of services by 2027, where areas in red are new initiatives not currently being provided.

Objective	Strategies	Activities
Capacity Building: Providing high-quality & transformative training and consulting services that develops organisations and the nonprofit sector workforce	Partner with accredited institutions to provide a continuum of Nonprofit Leadership Development certifications that combines virtual learning and local personal development sessions to develop a pipeline of future leaders	Introduction to Nonprofit Management Certificate Programme, UWM Certified Nonprofit Professional Credential Programme, NLA Certificate in Nonprofit Finance, Northwestern University Certificate in Nonprofit Fundraising, Villanova University
	Design and deliver nonprofit technical trainings across key nonprofit competencies and BNSC standards areas, incorporating best practices and peer learning	Programme Design and Evaluation, in person Social Impact Measurement, virtual Nonprofit Strategy & Planning , virtual Board Development Series, virtual Collaboration and Systems Change, virtaul Performance Management basics, virtual Diversifying Fund Development, virtual Conducting a Needs Assessment, virtual The Role of the ED, virtual Starting a Nonprofit, virtual Understanding Bermuda's Third Sector, virtual Advanced Design and Evaluation (require org pairs), in person Graceful Exits, virtual

	Coordinate specialist trainings with guest SME's to keep sector current on emerging trends, hot topics and speciality best practices	Cyber Security Awareness, Derek Burton VPP / Bully and Harassment Awareness, CAA Social Media Marketing, TBC Social Enterprise/Business Plan Writing, SIA/Ignite/BEDC Storytelling and Pitching, SIA Supervision Practices, Solstive Charities Act Compliance, Registrar Employment Act Compliance, BEC Volunteer Management, TBC Succession Planning, SIA Nonprofit Mega trends, SIA
	Provide consulting services to meet more intensive needs of nonprofits	Provide strategic planning services Offer executive leadership coaching Provide crisis management guidance Offer nonprofit organizational assessments (CCAT) Provide Theory of Change / Programme evaluation assessment & guidance Offer board assessments, education and development planning
	Run a Nonprofit Accelerators programme to grow and scale nonprofits	Deliver Propel Accelerator Programme Deliver Propel Readiness Programme
	Coordinate Nonprofit Internship Programme to foster college student interest in the nonprofit sector	Design and deliver cohort sessions Match interns with nonprofit placements

Coordination: Offering access to information and resources that creates economy of scale for the sector	Coordinate Information Sharing to increase cross sector awareness	Circulate quarterly updates of Crisis Suports list, in partnership with FSWG Resource Hub and Calendar on website Provide opportunities in membership convenings for information sharing
	Coordinate collaborative resourcing to improve inter-organisation synergies, efficiencies and partnerships	Launch a Board member, volunteer and resource sharing portal Coordinate Third Sector Benefits Alliance

Collaboration: Facilitating collective work and relationship building that makes a difference	Provide network building opportunities to build relationships across the sector	Coordinate quarterly in person membership convenings to discuss sector wide issues, trends and collective advocacy initiatives Conduct outreach to new professionals in the field
	Provide backbone and start up support to nonprofit collaboratives to assist them in having collective impact	Provide backbone administrative and advisory guidance to YDLC Provide backbone administrative and advisory guidance to FSWG / Implement collective food aid CMS Facilitate exploratory discussions between nonprofits on collaborative opportunities Provide opportunities in membership convenings to discussion opportunities for sector collaboration Provide start up guidance to new and emerging collaboratives

Champion: Advocating for the sector to increase support for nonprofits	Raise profile of nonprofit sector in community that results in greater support for the sector	Conduct presentations and speaking engagements on the value and impact of the sector Post on social media to promote value and impact of the sector Support opportunties for nonprofits to collectively work to raise their value and impact
	Lead collective advocacy for sector policy and process changes that benefit the sector	Provide opportunities in membership convenings to discuss, align and collectively pursue sector wide advocacy priorities and actions Lobby for adjustments to census data collection to support better assessment of community need Lobby for the automation of registrar reporting/regulations process Design and roll out advocacy campaign to promote Board participation

Financial Projections

The Nonprofit Alliance has forecasted four year financial projections that underpin the growth of the organisation. The main source of expense increases are:

1) Increase to Strategy and Capacity Building Contractor hours
2) Introduction of a Director of Programmes role

Year	Donations	Revenues	Expenses	% Change
2021 2022 Actual	$ 318,000.00	$ 366,305.00	$ 341,388.00	
2022 2023 Actual	$ 430,000.00	$ 525,778.00	$ 484,668.00	42%
2023 2024 Currently On Track	$ 570,000.00	$ 625,000.00	$ 620,000.00	28%
2024 2025 Projected	$ 575,000.00	$ 670,000.00	$ 660,000.00	6%
2025 2026 Projected	$ 625,000.00	$ 723,299.11	$ 713,299.11	8%
2026 2027 Projected	$ 680,000.00	$ 785,655.98	$ 775,655.98	9%

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This growth will require us grow donations by $110,000 up to $680,000 over the next three fundraising cycles, or by January 2027. $285,000 (42%) of this is confirmed in current multiyear grant agreements with two Foundations. A minimum of at least one new major multiyear partnership will be needed to achieve the desired growth. The alternative plan is a scaled back form of growth that does not introduce a Director of Programmes. This is not preferred as the organisation believes this role is critical for building its internal bench strength and to support long term succession planning and ability to deliver high quality capacity building services

Organisational Structure, Staff and Board

Full Time Staff

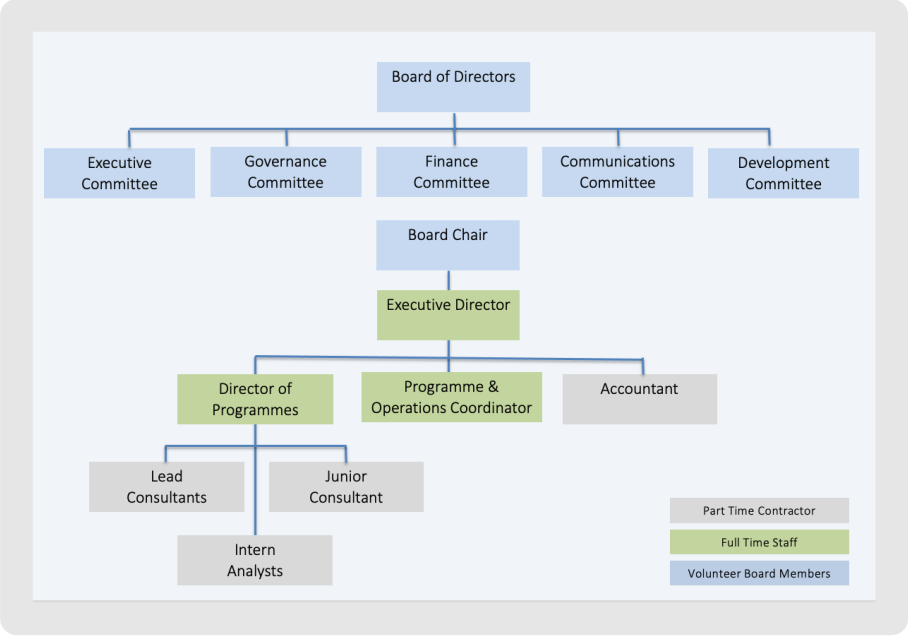
Dr. Nicola Paugh, *Executive Director*
Pamela Amaral, *Programme and Operations Coordinator*
To be hired in 2025, *Director of Programmes*

Part Time Contractors

Dr. Claudette Fleming, *Nonprofit Strategy and Capacity Building Consultant*
Dr. Glenn Faries, *Nonprofit Strategy and Capacity Building Consultant*
Shana Williams, *Junior Consultant*
Dominique Smith, *Independent Accountant*

Volunteer Board Members

Chair/Chair of Executive Committee: Dr. Sandy De Silva
Vice Chair/Chair of Governance Committee: Jevon Williams
Treasurer/Chair of Finance Committee: Margaret Oliana
Chair of Development Committee: Sarah Dunstan
Chair of Communications Committee: Priya Suagh
Secretary: Danielle Frith

Members At Large:
Graham Jackson, *Finance Committee*
Jeanene Todd
Dr. Nicola O'Leary, *Governance Committee*
Samantha Nearon
Sally Penrose, *Governance Committee*

Ex-Officio (non-voting)
Dr. Nicola Paugh, Executive Director