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Executive Summary

In 1982, Charles F. Feeney established The Atlantic Foundation, the first and largest of the charitable entities within the Atlantic Philanthropies group. Atlantic's Bermuda programme was part of the group's global grantmaking. Since its inception, Atlantic has invested more than \$28 million in the island of Bermuda.

Atlantic played a major role, both in strengthening the third sector and as a leader in strategic philanthropy, against the backdrop of its mission to bring about lasting change in the lives of disadvantaged and vulnerable people. Change was achieved by capitalising on significant investment opportunities to subsidise the resolution of pressing social problems that had potential to escalate and become more costly challenges over time. Typically, Atlantic's work focused on the systemic issues that produced adverse social conditions and supported organisations that advocated for 1) increased and smarter Government funding for social programmes, 2) stricter laws that protected civil rights that were fair and fostered economic equality, and 3) policy changes that addressed the needs of the most disadvantaged and vulnerable.

A giving strategy was put in place with three main goals: 1) to build organisational and leadership capacity; 2) to build capacity in the fields of advocacy and social movements; and 3) to advance strategic philanthropy. Recognising the growing potential of small grassroots organisations, Atlantic brought together a team of grantees pursuing social justice advocacy on progressive issues. In addition, they sought to influence larger more established service-based organisations to develop advocacy

efforts aimed at addressing social issues more systemically. Alongside these direct service grants, Atlantic invested more than \$5 million in intermediary organisations to provide much-needed technical assistance and capacity-building services to Atlantic grantees and other organisations to develop a more robust third sector overall.

This report describes the evaluation of Atlantic's Bermuda Programme grantmaking strategy and highlights many of the challenges and successes of the work in Bermuda. A brief narrative of the history of Bermuda and other earlier grantmaking on the island delivers the context in which the Bermuda programme work was introduced. The majority of the report focuses on Atlantic's grantmaking strategy and provides the quantitative and qualitative evidence of its impact. Finally, there is a focus on three grantee organisations, lessons learned, and Atlantic's legacy in Bermuda.

Based on the "giving while living" philosophy of its founder, The Atlantic Philanthropies has made a commitment to close its doors by 2020. However, the grantmaking programmes in Bermuda, South Africa and Vietnam had earlier timetables and all three programmes concluded at the end of 2013.

PART ONE

Bermuda Context

Bermuda, a British overseas territory in the North Atlantic just 640 miles east of the North Carolina coast of the United States, is a small island rich in history, culture and tradition. Discovered in 1505 by Spanish sea captain Juan de Bermúdez, Bermuda became an established English colony in 1684. Now the oldest colony of Great Britain, Bermuda has a diverse population made up of descendants of slaves from the West Indies and West Africa, English settlers, Irish adventurers, exiled North American Indian prisoners and Portuguese immigrants. Bermuda has a population of approximately 64,000 people, comprised of native-born and naturalised citizens and expatriate guest workers.

While small in size, Bermuda is a naturally beautiful archipelago. Often referred to as the “Jewel of the Atlantic,” Bermuda is famous for its pink sand beaches and colourful white-roofed houses. These characteristics created a strong and vibrant tourism sector for many years. Beyond its physical beauty, Bermuda is also a wealthy country and has one of the world’s highest GDP per capita. Unlike many islands, the tourism-based economy had ceded to an economy primarily based on international business. Bermuda is ranked as one of the top offshore insurance and reinsurance sectors in the world.

Social Challenges

While idyllic in its description, beneath the veneer of wealth, Bermuda also has the same racial, economic, and social challenges found in any

society around the globe. With a long history of maritime trade, a nominal role in the slave trade, and supplying munitions to the Confederates during the United States civil war, historically many fortunes were established in Bermuda while also creating a seemingly permanent underclass. As blacks, and some whites, were slaves and/or indentured servants, their ability to participate fully in the economy as producers was severely hindered. As a legacy, structural inequalities have manifested themselves in many civic indicators like income, employment, education, and health, all of which are split along racial lines. Unfortunately, despite a few historical instances, there has not been a consistent culture of social activism in Bermuda. Bermuda’s small size has worked against the evolution of activists who could safely criticise the status quo and seek social justice for those affected. In such a small community, the powerful few (who controlled legislation, land, banking, etc.) were able to censure vocal citizens through fear of retaliation. Bermuda could best be described as socially conservative.¹ This is changing as a few grassroots organisations have emerged with a great deal of promise.

Bermuda at a glance

<i>Capital</i>	Hamilton 32° 18' N 64° 47' W
<i>Area</i>	20.6 sq miles / 52.3 sq km
<i>Official language</i>	English
<i>Government</i>	Parliamentary Democracy (British Overseas Territory)
<i>Population</i>	64,237 (2012)
<i>Density</i>	3,293 sq miles / 1,275 sq km
<i>GDP (2012)</i>	\$5.6 billion \$86,000 per capita
<i>Unemployment</i>	8%
<i>Poverty</i>	11%
<i>Ethnic groups (2010)</i>	54% Black 31% European 8% Multiracial 4% Asian 2% Other
<i>Median age</i>	42.6 years 40.9 years male 44.3 years female

¹ Until 2013, segments of the Bermuda community had yet to realise full protections under the law.

Economy

Bermuda's economic status has been negatively affected by the recent global recession. With an economy primarily dependent on international business, the subsequent downsizing and relocation of some companies or staff away from the island has played a major role in creating the now troubled economy. With a growing national debt of more than \$1.5 billion, and a downgrading of its Fitch credit rating, there may be more trouble on the horizon for Bermuda. For the first time, unemployment has become a reality on the island. The Bermuda Government reported that the single largest decline in the number of jobs in the workplace occurred between 2011 and 2012. Employers reported an overall decrease of 1,956 jobs as the market contracted for the fourth year in succession. There were no notable employment increases in any of the major sectors of the economy.

Employment

With the presence of a large expatriate guest worker population, a competitive 'anti-guest worker' environment has developed as Bermudians strive to maintain their position in the workforce. When companies downsize or relocate, they often decrease their number of guest workers. However, this does not necessarily translate into more jobs for Bermudians, given that some companies have asked fewer workers to do more or have relocated some corporate functions off the island entirely. Oddly, as downsized companies repatriate guest workers, the effect has not necessarily been positive for the local economy. Over the years, Bermuda has benefited greatly from the presence of guest workers in the form of rent, living expenses, and their patronage to local businesses. The contracting employment market has had adverse effects on both the local

economy and its citizens. While Bermuda boasts one of the highest income per capita rates, it also has one of the highest costs per living in the world. With the new phenomenon of unemployment, Government figures revealed that 1,375 people claimed assistance in 2012, up from 1,350 in the previous year, and a rise of 94 percent from the 714 who claimed in 2005–06. This was a clear indication that an increasing number of citizens were vulnerable to the economic downturn, which served to deepen existing divisions along socioeconomic and racial lines.

Crime

Bermuda has also struggled with an increase in violent crimes. Gun-related violence reached its peak in 2010–11 but the number of reported incidents has since decreased to almost half. The Bermuda Police Service (BPS) implemented an anti-gang activity initiative, recovering a number of firearms on the island. Nevertheless, robberies involving both residents and tourists continued to occur. Now the third most heavily policed country in the world, according to 2009 statistics reported by *The Royal Gazette* newspaper, Bermuda had 7.01 police officers for every 1,000 people. However, despite a heavy police presence, the previous 10 years had seen violent crimes rise to their highest in the island's history. Ironically, Bermuda's small size works against capture and conviction efforts. Because the degree of separation between victims, witnesses, and perpetrators is so small, it is often difficult for the police and courts to get credible leads and testimonies leading to arrest and conviction. In an effort to address these growing problems, the Government implemented a controversial 'stop-and-frisk' practice that had been declared unconstitutional by many local advocacy groups. Violent crimes have had an obvious impact on the community and will likely have an impact on the economy if

international businesses and tourists deem the island too great a risk to personal security.

With a historical narrative of affluence in Bermuda, it was once inconceivable that many of these issues would grow to threaten the very livelihood of the country, but together, these factors exacerbated longstanding social and economic divisions on the island, severely impacting the most vulnerable of its citizens. While the Government struggled to find its way out of the economic recession, it also had to contend with a rising poverty rate. Most recently, the Government decreased or entirely cut grants made to local civil society groups that offered direct services to vulnerable citizens. This was especially troubling as the Government's ability to offer social assistance to families falling below the poverty line decreased at the same time many social service organisations were also struggling to provide much-needed services. As a result of these cutbacks in Government funding, many nonprofit groups have had to rely on individual and corporate philanthropy to survive. In a weakening economy where corporate philanthropic dollars are also diminishing, many organisations are struggled to keep their doors open. Ultimately, those who are in most need in the community were left without a safety net.

Charity in Bermuda

In decades of prosperity, a charitable spirit had proven strong in Bermuda. With approximately \$33 million in charitable dollars flowing through the third sector,² donations from individuals, private foundations, and corporations provided significant support to nonprofit organisations addressing social issues in the community. These dollars also supported an array of environmental and cultural organisations that contributed to the strength and vibrancy of Bermuda. This giving, however, was best described

as charity. With an abundance of registered charities on the island (approximately 363—making Bermuda the most densely populated centre for registered charities per square mile in the world), there was a great deal of redundancy. While most donated dollars tended to be given to a few highly visible and more established organisations, giving in general had been based on sporadic programmatic offerings and personal relationships, as opposed to core funding to strengthen organisations with demonstrated results and long-term strategy. Furthermore, an inefficient regulatory environment had led to a proliferation of charities, duplication of services, and dilution of funding. Many of these charities had been one-off, event-based organisations formed in response to short-term situations versus comprehensive organisations poised to address systemic issues in a systematic way.

There is a difference between charity and philanthropy. Charity can be described as a short-term solution to help someone with an immediate need, whereas philanthropy seeks to improve the material and social welfare of humanity and has the aim of benefiting society, rather than simply helping individuals in need.³ Philanthropy is not the exclusive preserve of very wealthy people. What distinguishes philanthropic giving from more spontaneous one-off charitable donations is that the money is given with a degree of reflection and a clear purpose.⁴

As charitable and/or philanthropic dollars decreased, the need for more thoughtful strategic investments in proven organisations had become a necessity. There were barriers to this type of giving in Bermuda:

Char-i-ty: the kindly or sympathetic disposition to aid the needy as a result of deep feeling or understanding of their misery or suffering.

—K. Woods, *Acton Institute*

Phi-lan-thro-py: a particular kind of charitable giving that is focused on the root causes of problems and making a sustainable improvement.

— *Philanthropy Ireland*

² The Centre on Philanthropy, www.centreonphilanthropy.org/pages/donorcommunity
³ Dietlin, L. M. (2009) *Transformational Philanthropy: Entrepreneurs and Nonprofits*, Jones & Bartlett Publishers, Chicago, Illinois.
⁴ Philanthropy Ireland, www.philanthropy.ie/ 2011

- The intimate size of the community facilitated decisions that were based more on personal relationships rather than evidence of efficacy.
- The lack of readily available data that could guide giving towards issues and causes that affected many versus a few.
- The lack of dedicated philanthropy staff providing technical expertise that could guide corporate and foundation giving. Many organisations based their giving on the preferences of top executives or a board of employee volunteers.

In summary, in a shrinking market for philanthropic dollars, donations were quickly evolving into investment-type giving with the expectation of some social return. This represented a type of transformative philanthropy that would be critically important for Bermuda, as it required more strategic thought and evidence-based decision-making.

History of Atlantic in Bermuda

The Atlantic Philanthropies Bermuda Programme was part of a larger organisation founded by Charles F. Feeney, that spanned the globe with its giving. In 1982, he established The Atlantic Foundation, the first and largest of The Atlantic Philanthropies group (Atlantic). In 1984, Atlantic received all of Mr. Feeney's interests in Duty Free Shoppers and operated anonymously for the first 15 years. Atlantic had made grants totalling more than \$6.1 billion as of December 2011.⁵ Based on the direction of Mr. Feeney, Atlantic adheres to a “giving while living⁶” philosophy that means the funds would be spent during his lifetime. Atlantic Philanthropies made a commitment to close its doors worldwide by 2020, while other Atlantic jurisdictions, such as the grant-making programmes in Bermuda, South Africa and Vietnam had earlier timetables. Atlantic's Bermuda programme awarded its final grants at the end of 2013.

⁵ Waleson, H. (2010) *Atlantic Report: Investing in Change*, Lake County Press, Waukegan, Illinois.

⁶ O'Cleary, C. (2007) *The Billionaire Who Wasn't: How Chuck Feeney Made and Gave Away a Fortune Without Anyone Knowing*, Public Affairs, New York, New York.

Early Grantmaking 1982–2008

Atlantic's Bermuda office, which was established in 1989, performed finance, treasury and corporate secretarial functions. While not a formal grantmaking office, there were early grants made in Bermuda between 1982 and 2006. While limited in focus, these grants were substantial, totalling approximately \$4 million to 13 organisations selected primarily by Atlantic Board members. Some of the early recipients included the Centre on Philanthropy, the Coalition for the Protection of Children and the Bermuda Biological Station.

In 2006, Atlantic made a greater and more focused philanthropic investment in Bermuda when a programme staff member was seconded from New York. Capacity-building grants were made to strengthen nonprofit and philanthropic organisations in the areas of youth and ageing, such as the Centre on Philanthropy, the Family Centre, the Bermuda Sloop Foundation, and Age Concern. Between 2006 and 2008, Atlantic made \$7.9 million in grants to 15 organisations.

Strategic Grantmaking 2009–2010

In 2009, Atlantic hired a local programme executive to develop its strategy and make recommendations on how best to direct its funds, thereby making a shift from issue-specific giving to strategic philanthropy. This new approach was based on: 1) guiding principles that represented values shared across Atlantic as a whole; and 2) its mission—Atlantic was dedicated to bring about lasting changes in the lives of disadvantaged and vulnerable people. Lasting change was achieved by identifying significant opportunities to solve pressing social problems that had the potential of becoming larger and more costly challenges over time and directing investments

accordingly. This was generally done by investing in work that focused on changing the systemic issues that produced adverse social conditions. Atlantic sought to support organisations that worked towards: 1) increased and smarter Government funding for social programmes; 2) stricter laws to protect civil rights that were fair and fostered economic equality; and 3) for other policy changes that addressed the needs of the disadvantaged and vulnerable. The Bermuda programme was driven by the following guiding principles:

- Social change would occur through a spectrum of grassroots and social movement activities, and would lead to social justice.
- Human capacity was one of few sustainable and generative forces. By cultivating the next generation of leaders, effective leaders and sustainable organisations would be developed that could influence other civil society groups.
- Social change required a combination of strategies, including building partnerships with Government, strengthening community voices, and empowering communities to advocate both for themselves and for those who were unable to do so.
- Evidence-based approaches and credible local bodies of information were key ways of both bringing to scale effective programme models and advancing larger advocacy goals.
- The use of structural analysis approaches that considered the impact of race, ethnicity, gender, income and sexual orientation on grantmaking and in working with grantees, would facilitate lasting systemic and institutional change.
- The belief that people had the right to freedom of speech and expression, particularly for those most excluded.

In essence, the Atlantic Bermuda Programme had embarked on a comprehensive effort to bring about social justice for the most disadvantaged of citizens through strategic philanthropy. The Bermuda programme executive launched this ambitious undertaking by conducting an analysis of the Bermuda landscape in terms of social inequities and local responses from Government and the third sector in general. Specific attention was paid to sectors key to Atlantic grantmaking globally (e.g. ageing, youth, human rights and population health). The findings suggested there were five primary barriers to social justice work on the island:

1. Limited capacity in key social change skills, including the ability to manage growing organisations, conduct research and communicate findings, engage and network with others, assess power, and organise a base constituency.⁷
2. Lack of coherent, compelling, and actionable information related to social issues.
3. Poor community/public debate on issues; limited respect for a culture of human rights.
4. Factors that inhibited individual action: feeling of disempowerment, fear of retaliation, lack of time/freedom, and apathy.
5. Lack of strategic, consistent, long-term funding support for nonprofit organisations, and lack of progressive infrastructure.

With this knowledge in hand, it became evident that unless these barriers were addressed, lasting systemic change in key social areas would be unlikely to occur. Other influencing landscape concerns also represented a significant challenge. Private funds had been funnelled to nonprofits on the basis of relationships. In response, nonprofits had developed reactive and unsustainable service delivery programmes, few of which have been measured for

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⁷ Pastor, M., Ortiz, R., (2009) *Making Change*. University of Southern California Press, Los Angeles, CA.

impact. Government had demonstrated little understanding of the third sector, the role of nonprofits and the potential of partnerships. Struggling with a spiralling deficit, the Government had made huge cuts to funding for nonprofits often without the

benefit of an informed process for either developing the service and/or consulting on the policy reform that could address mutual concerns.

Atlantic wanted to build enduring institutions and leadership that could identify and tackle structural inequities, but to do so needed to change the longstanding practice of charitable type grantmaking. The theory of change was that resources spent on changing public policy would, if successful, go much farther than resources directed solely to direct service. This represented a completely new approach to giving on the island. The Bermuda programme endeavoured to achieve two primary objectives:

1. To create a stronger and more enduring local capacity for social change by facilitating:
 - a) **Effective collaborations.**

Key stakeholders in the public, private, and nonprofit sectors would work collaboratively to research and analyse issues, problem-solve, and refine ways of working to best support the community as a whole.

- b) **Active constituencies supporting progressive issues.** A larger base of community support

(especially for those least well-off) would be actively engaged in examining and prioritising social issues, identifying solutions, advocating, and supporting the implementation of policy reforms.

2. To create a network of supports and resources for organisations working for social change by facilitating:

- a) **Consistent access to, and utilisation of, actionable information.** Advocacy campaigns and social movements would consistently access and utilise clear, compelling, and actionable information to support their efforts
- b) **Progressive infrastructure.** Local institutions would collectively comprise a planning, decision-making, knowledge management and administrative framework for advocating for rights and democratic process, and support the work of advocates through training, social policy research and analysis.
- c) **Strategic social justice philanthropy.** A larger number of funders would work with nonprofits to deliver more effective solutions to social problems through high-impact funding, support for advocacy and grassroots movements, and more integrated, coalition-based work.
- d) **Established research partnerships.** Mutually beneficial, sustainable collaborations would include organisations, institutions, and individuals who supported or participated in developing an innovative knowledge-base for civil society and social policy work.

Based on this strategy, early planning grants were made to very early-stage grassroots organisations that had innovative approaches to social change and human rights. Small, first time grants were given to voluntary activist groups such as Citizens Uprooting Racism in Bermuda (CURB), Two Words and a Comma, the Chewstick Foundation, and the

Strategy in Action

Atlantic supported two hallmark studies, “On the Wall or On the Margins?” and “Out of School and On the Wall.” This research was conducted by the Columbia University School of Social Work Center for Research on Fathers, Children, and Family Well-Being. The first of their kind on the island, these studies investigated and documented the realities of disenfranchised Black Bermudian men. This investment brought to light their perceptions of educational and employment opportunities and produced knowledge about why Black males tend to experience achievement and employment challenges compared to their same-age peers. Furthermore, this study revealed that the unemployment rate for Black men was almost double that of their White peers and that education alone did not account for these differences. These findings stimulated a long awaited dialogue on race in Bermuda. The dissemination of this information catalyzed several reactions across many sectors of the community, including formal responses by the Bermuda government and concerted efforts within the third sector.

Centre for Justice. The grants were ground-breaking for these fledgling groups, whose missions were incongruent with more commonly funded direct-service agencies. Bermuda funders were simply not accustomed or inclined to fund small unknown organisations that were not providing direct remedial services to clients. Citizens Uprooting Racism in Bermuda (an active organisation educating and fighting racism in Bermuda), Two Words and a Comma (a potent organisation advocating for gay rights), and the Chewstick Foundation (a cultural arts movement dedicated to breaking down social barriers) existed only because of the efforts of a few dedicated volunteers. The planning grant for the Centre for Justice represented a major commitment to bring about the first independent, non-governmental organisation with a mandate to promote and advocate for human rights, civil liberties and the rule of law in Bermuda. With Atlantic funding, these organisations were able to establish themselves and acquire personnel to actively run mission-specific activities and general operations. While Atlantic funding represented a major lifeline for these grassroots organisations, there were many challenges that would soon emerge.

Adjusting the Strategy 2010–13: Seeding Big Ideas and Building the Capacity to Sustain Them

In 2010, as Bermuda’s programme executive began to monitor the progress of its initial grants under the new strategy, a harsh reality emerged that would cause an amendment to the two-pronged strategy. The first objective to create a stronger and enduring capacity for social change seemed to be premature. Eager for grassroots grantees and the sector to engage in collaborative experiences endorsing proven social advocacy techniques, it became clear they were not only unaware of these approaches

but that many of them were struggling with basic organisational capacity issues. Responsive to the needs of the grantees, a new three-pronged strategy was developed to include a phase of funding that would literally strengthen the grantees by providing key organisational and leadership capacities. The next hurdle was to identify local capacity-building resources that could aid in this new work. This proved to be a challenge that precipitated grants to intermediary organisations (both on and off the island) that could work directly with Atlantic grantees on organisational capacity as well as train local individuals to become technical expertise providers in the long term. A grant to an overseas intermediary provided technical support for a capacity-building programme for some of these grantees. This work spanned a 12-month period and included organisational assessments, developing business plans and performance measurement systems, and providing executive coaching to NGO leaders to help them develop the skills to implement their plans effectively. The expected short-term outcomes of the grant were for Bermudian organisations to receive ongoing capacity-building support to ramp up their ability to capitalise on emerging opportunities. The long-term outcomes of the grant were: 1) increased local capacity to assist nonprofits seeking organisational development assistance; and 2) stronger and sustainable nonprofits better able to support the needs of vulnerable populations and have an impact on other important issues in their communities.

In 2011, Atlantic Bermuda launched its new three-pronged strategy that emphasised the need for a more gradual developmental approach to achieving its primary objectives (*see fig. 1*).



Fig. 1

A harsh reality emerged that would cause an amendment to the two-pronged strategy. The first objective to create a stronger and enduring capacity for social change seemed to be premature

Strategy 1: Build Leadership and Organisational Capacity

Atlantic aimed to increase Bermuda's capacity for social impact by helping create organisations that were stronger, more effective, sustainable, and with the ability to influence social change through advocacy. Additionally, they also aimed to increase the number of grassroots, grasstops,⁸ and organisational leaders with the capacity to drive social change. The specific capacities to be developed were the core abilities to: a) manage growing organisations; b) research, frame and communicate; and c) engage and network with others. Strategy 1 ultimately focused on increasing the number of leaders who understood and integrated social justice theory into their organisational practice, thus increasing the number of leaders and organisations with core advocacy capacities.

A key investment in line with Strategy 1 goals was Atlantic's core grant that established the Coalition for Community Activism in Bermuda (CCAB). The first of its kind in Bermuda, CCAB filled a much-needed space in the growing field of social justice advocacy on the island. CCAB, a citizen-based group, operated as a resource for the community by promoting democracy-building and active public engagement in support of social justice, equity and human rights. CCAB brought together leaders across every sector as well as citizens to introduce them to the process of deliberative dialogue.⁹ This process enabled Government officials and community leaders to engage a broad cross section of the community in productive, action-oriented deliberation geared towards meaningful problem-solving. Atlantic's support to the Coalition for Community Activism saw the group deliver on bringing key Government decision-makers, nonprofits, and Members of Parliament to a round-

table on advancing freedom of information policy. CCAB played a significant role in mobilising the community and coordinating nonprofit engagement in the pursuit of greater transparency from the Government. CCAB convened a leadership forum on the issue composed of a former premier, MPs, business and nonprofit leaders, and dispersed the information to its constituents. In 2010, the *Public Access To Information Act* was debated and unanimously approved in the House of Assembly. This historic work represented a true victory for social change in Bermuda through civic engagement.

Strategy 2: Advocacy and Social Movement Field Capacity Building

The second strategy included a fundamental element of Atlantic's social justice approach, through which it hoped to grow the effectiveness and sustainability of advocacy and social movement efforts across the island. The goal was to build and support advocacy and social movement-focused capacity-building, research and infrastructure. Developing progressive infrastructure meant funding intermediaries to build out and provide capacity-building and research platforms for civil society organisations. To achieve these outcomes, Strategy 2 included components to fund intermediary organisations and broader systems of support for grantees.

One prime example of this strategy in action was the groundbreaking grant to the Aspen Institute. Atlantic Philanthropies enlisted the assistance of the Aspen Institute Roundtable on Community Change to provide a structure and theory¹⁰ that facilitated thought, dialogue, and action around structural racism (a key social justice issue in Bermuda). Atlantic sponsored the Aspen Racial Equity and Society Seminars for leaders from a variety of fields and sectors to immerse themselves in readings, dialogue and collective work

⁸ The Communications Network describes grassroots as scrappy little organisations with lean budgets; passionate leaders with no fancy credentials or positions of power; and grasstops as elites who have power but are also attached to a good cause, i.e. church, sports or social club leaders.

⁹ Kadlec, A., Friedman, W. (2009) *Beyond Debate Impacts of Deliberative Issue Framing on Group Dialogue and Problem Solving*, Public Agenda Research Brief, New York, NY.

¹⁰ Lawrence, K., et al. (2009) *Constructing a Racial Equity Theory of Change: A Practical Guide for Designing Strategies to Close Chronic Racial Outcome Gaps*, The Aspen Institute, Washington, DC.

around issues of race, ethnicity, and equity. Participants were enabled to re-examine the underlying assumptions, beliefs and values that shaped race and equity discourse for themselves and the island. Participants also had the opportunity to work with colleagues in applying these insights to the social, economic, and political challenges in their own spheres of influence. This investment, like the Columbia University reports, catalysed Bermuda's dialogue and perspective on social justice and the need to examine taken-for-granted structural barriers to progress. Seminar participants developed small working groups that tackled these issues across many sectors such as education, employment, media, and the law.

The partnership between Atlantic and the Aspen Institute manifested Strategy 2 objectives by shaping thought and dialogue but also by providing lasting infrastructure for action to occur across key sectors on the island. There was an increase in the number of Bermudians in leadership positions in the public, private, nonprofit, and civic sectors well versed in the causes and consequences of racial inequity. This included the understanding of the individual, institutional, and structural dynamics that maintained racial disparities in Bermuda. Beyond the seminars, the partnership provided support to these leaders as they undertook work in their organisations and communities to promote racial equity.

Two important tangible products emanated from this work: 1) a toolkit to help leaders in the nonprofit sector develop strategies to increase diversity in their governance structure; and 2) a framing document for media professionals to help them deal with race in their work. The Atlantic-Aspen Partnership in Bermuda work will culminate in the publication of "Race and Structural Racism in Bermuda." This will represent a meaningful piece of research that will serve to further strengthen the third sector and the

island as a whole in understanding and intervening in the area of structural racism.

Strategy 3: Advance Strategic Philanthropy

Atlantic's third strategy focused on increasing strategic philanthropy in Bermuda, and establishing consistent long-term funding for social justice and early-stage organisations. To further the metaphor for grantmaking used earlier, this third strategy was needed to sustain the growth of the seeds planted in Strategies 1 and 2. With an emerging body of organisations on the island focused on social justice advocacy, Atlantic needed to ensure its long-term existence by championing the need for more strategic philanthropy among the third sector. This proved to be the most challenging of the strategies. Evidence of success would include greater collaboration among funders, performance-based funding, and unrestricted funding for social advocacy work.

Achieving the goals of this strategy involved creating structures to facilitate strategic philanthropy but more importantly, it involved providing information about the approach to influence the sector. The Atlantic Bermuda Programme Executive engaged the donor community in various ways, including memberships on key committees, convening thought partners, and providing infrastructure to frame and facilitate strategic philanthropy. Some examples included meeting with corporate funders and cultivating relationships with private funders with the goal of shifting perspectives on funding social justice and human rights causes. Donors were invited to convening sessions to showcase the social justice advocacy work (causes) of the grantees. Finally, select donors were asked to give small partner grants to support larger Atlantic-funded initiatives aimed at improving the third sector (evidence-based work, indexing charities, etc.).

"The funding from Atlantic Philanthropies has been critical in convening Bermudians to introduce them to the structural racism framework, launch the Aspen Bermuda Partnership on Racial Equity as well as work with members of the partnership on an on-going basis to address racial disparities in key areas."

—Aspen Institute

"Public policy advocacy work in Bermuda seems to be very closely linked to establishing relationships of trust and respect... I believe that Bermuda has both the knowledge (drawn from people's experience and insight) as well as the information to make policy work..."

—Coalition for Community Activism in Bermuda

PART TWO

Learning From Investing

Atlantic Bermuda enlisted the help of technical advisors to clarify the new strategy in order to design an evaluation to better understand how their grantees were progressing through the programme offerings. A detailed logic model was drafted representing the complexity of the work and the desired outcomes (see fig. 2).

Bermuda Programme: Composite Logic Model

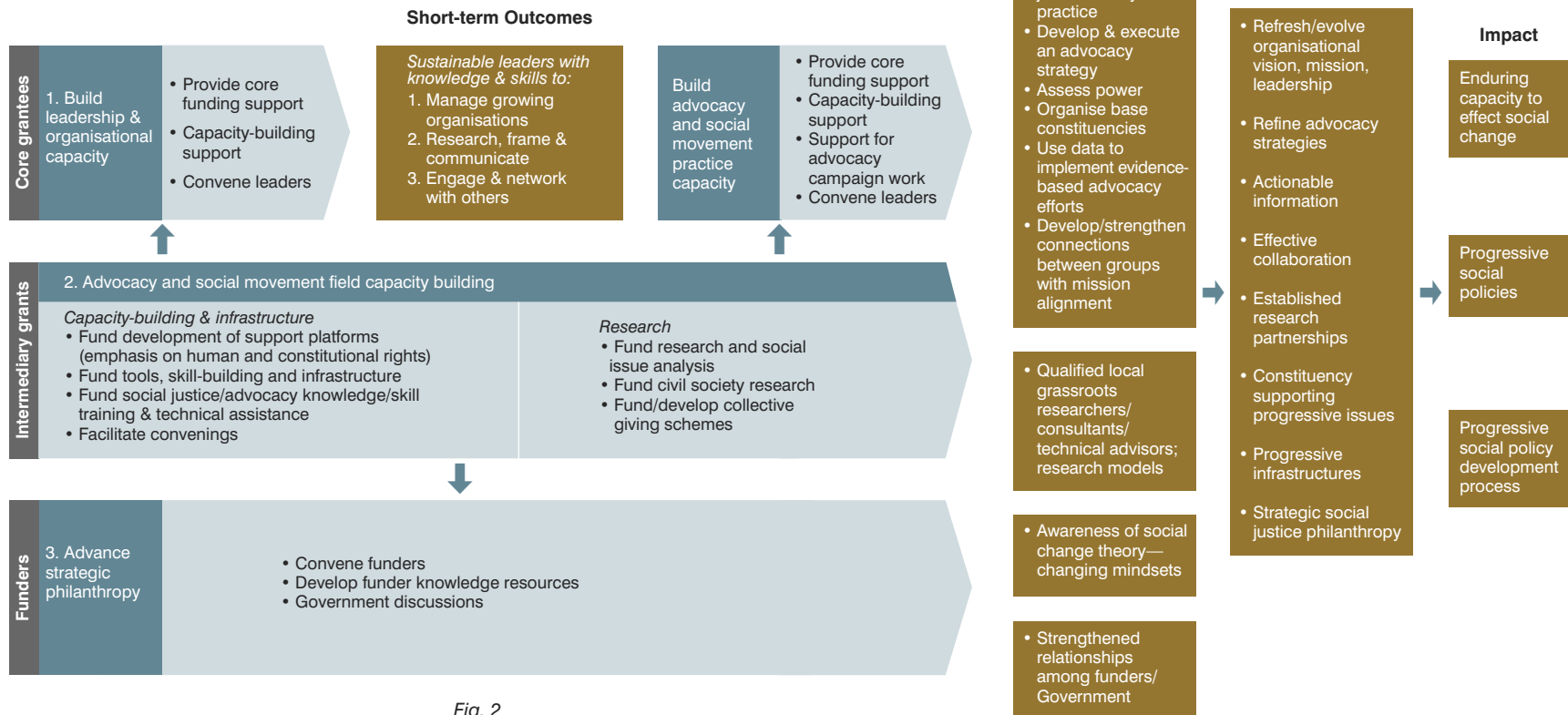


Fig. 2

Evaluation Methodology and Results

This logic model served as the basis for the development of a survey tool and other evaluation methodologies for grantees. This was the first comprehensive assessment of the grantees and the impact of Atlantic grantmaking. To triangulate meaning, multiple data collection methods were used, including survey, interview, and archival research.

The survey was developed by operationalising programme outcomes from the logic model. Indicators were gleaned from relevant research and topic based literature. The survey, containing 75 response items, utilised both open-ended narrative response questions and closed-ended questions with yes/no, multiple choice, and Likert scale response formats. Participants were also given the opportunity to add detailed narratives regarding their experiences with Atlantic, grant objectives, and lessons learned. The survey was administered twice—once in 2011 and again in 2013. The evaluation survey tool was introduced to grantees during a special convening where the purpose and design were summarised. This was done specifically to not only inform the grantees of the upcoming evaluation, but to also model for them the important evidence-based practice of evaluating their work.

Time-one participants included nine Strategy 1 grantees, and five intermediary organisations. Time-two participants included six core grantees. Time-one survey data was compiled by Atlantic office staff and analysed by an external data analyst. Time-two survey data was compiled and analysed by an independent evaluation consultant. One limitation to this study would be the small sample size or number of participants in the survey research. Small numbers preclude the use of more robust inferential statistics, and thus generalisability

and/or predictive ability are lost. Therefore, findings are presented in descriptive form and the use of the word ‘significant’ should not be considered as ‘statistical significance.’ Another limitation in this study included non-responsive participants. Therefore, quantitative or qualitative data that would have determined the true impact of Strategy 3 (Advance Strategic Philanthropy) efforts with the broader funding community were not ascertained from donors. In the absence of these data types to triangulate meaning, archival data was used to report accomplishments in this area.

Valuable perspectives were gained from interviews with staff, board members, grantees, and other stakeholders. A total of 11 interviews were conducted utilising an interview protocol developed by the independent evaluator and also a question guide developed by Story Corp (as part of Atlantic’s global documentation project). Interviews were audiotaped and transcribed. Interview transcripts were analysed using a grounded theory research method.¹¹

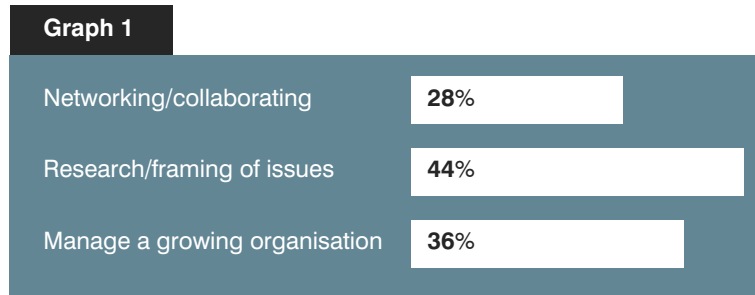
Archival research was conducted using historical documents, reports, brochures, and organisational websites. Ethnographic notes, captured by the author during observations, were also used to increase understanding and accuracy.

¹¹ Charmaz, K. (2013), “Grounded theory methods in social justice research,” In *Strategies of Qualitative Inquiry*, edited by N. Denzin and Y. Lincoln, Sage publications, Thousand Oaks, CA.

Survey Results 2011

Strategy 1: Grantees

As a baseline collection effort, the 2011 survey revealed that the majority of grantees were still early in the developmental stage of achieving the desired outcomes.*



Short-Term Outcomes: Building Leadership and Organisational Capacity

The ability of an organisational leader to lead, adapt, manage, and technically implement core grant activities including an advocacy strategy:

Manage a growing organisation — half or fewer of the grantees responding to these questions had accomplished targets for organisational capacity such as having:

- an articulated mission (44%)
- an articulated vision (33%)
- an articulated social issue/problem for which their organisation existed (33%)
- the ability to determine financial status (22%)
- a budget (50%)
- a governing board (44%)
- structured staff (33%)
- established organisational policies (36%)
- produced annual reports (36%)
- an evaluation strategy (33%)

* Bar graph values represent average sub-scale scores from the survey.

Research, frame, and communicate — less than half of grantees were in the practice of regularly seeking relevant and advancing information/data about their field/cause. On average, 44% of grantees consulted various information sources, i.e., online databases, Government websites, etc. Fifty-seven percent (57%) of respondents reported utilising the information to inform their own thinking, to inform programme design, and to develop position statements/papers.

Networking and collaboration with others — fewer than half of grantees reported having formal relationships with peers/organisations within their field (33%). Of those responding positively, 43% used their peers as thinking partners or to share technical assistance resources. Only 30% of grantees had actually convened their peers around issues or shared interests. Twenty-two percent (22%) had brokered relationships with peers/organisations outside their field, while 22% had shared information with other organisations. A third of grantees (33%) had planning and strategy meetings with other organisations.

Mid-Term Outcomes: Increase Advocacy and Social Movement Practices

Evidence that an organisation has acquired and integrated social justice/advocacy theories and practices into its operations:

Integrate social justice theory into practice — the majority (67%) of grantees felt that social justice was important to their work and equally (67%) reported having made efforts to deepen their knowledge of social justice theory. The most popularly reported vehicle for building knowledge in this area was reading social justice literature (50%) and attending workshops and/or conferences (43%). A promising number of grantees (43%) reported they had publically articulated a set of organisational values/goals related to social justice. However, only 11% had developed a formal line of work in this area. It is

important that the majority (56%) had actually identified root cause factors contributing to the social problems relevant to their organisation as this represented real progress from a primary focus on direct service delivery.

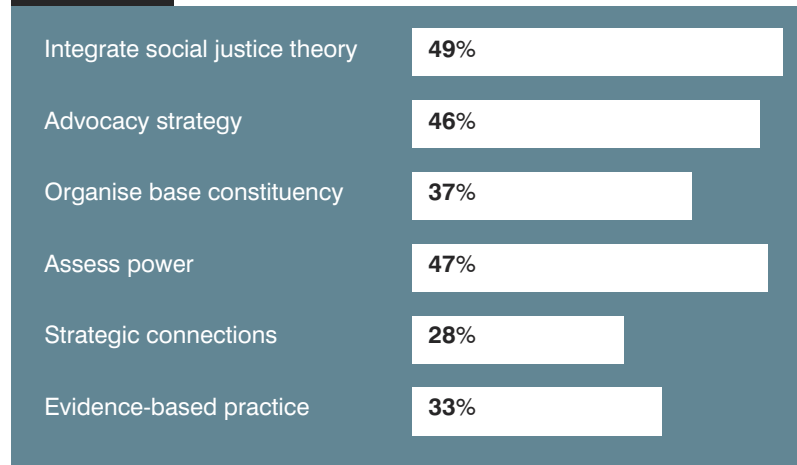
Advocacy strategy — less than half of grantees (44%) had made a concerted effort to deepen their knowledge of advocacy strategies. However, 64% reported having conducted advocacy strategies like coalition-building/networking and policy analysis/research and 43% engaged in media advocacy to raise public awareness as well as lobbying. Only 29% of grantees had developed a tactic to address root causes of their social issues. They reported conducting internet/email campaigns, writing letters, and lobbying as their tactics.

Organise base constituencies — thirty-three percent (33%) of grantees had identified a base constituency with 50% identifying their clients/members in this way. However, only 33% had actually convened their constituencies, although 44% reported that they were in regular contact at least monthly.

Assess power — thirty-three percent (33%) of grantees reported they had mapped the power dynamics that affect their work and/or client base, and 44% had identified key stakeholders through relationships with clients (50%), donors (50%), volunteers (57%), Government officials (50%), and the general public (43%). Over half (56%) had made efforts to investigate stakeholder interests, characteristics, and circumstances; with individual conversations being the most popular method (57%). A slim majority of grantees (56%) reported having developed a formal partnership with at least one organisation with a common mission.

Develop and strengthen strategic connections — grantees had begun to develop formal partnerships with common social justice goals (44%). However, only 11% had actually initiated efforts with other organisations to influence legislative/system changes.

Graph 2



Implement evidence-based practices — twenty-two percent (22%) of grantees reported they conducted issue/policy analysis on data to inform their advocacy efforts. A promising 44% had a method of collecting advocacy-related data, mainly through aggregating client records, surveys, individual interviews, and focus groups.

Long-Term Outcomes: Established Social Justice Organisations

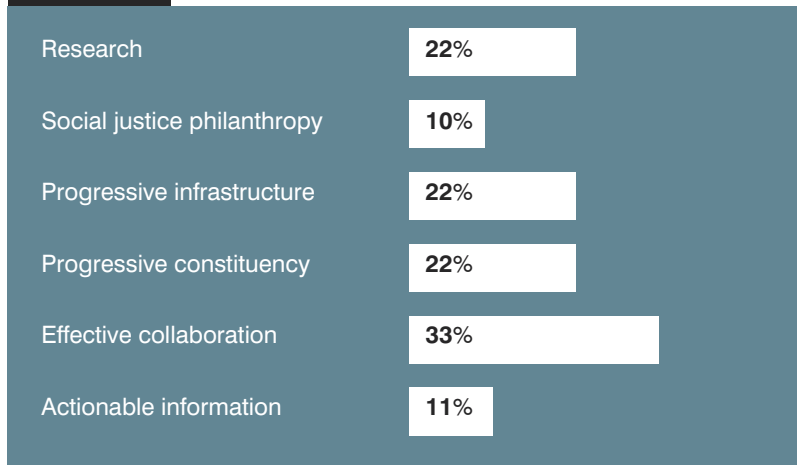
Evidence that an organisation has implemented a social justice/advocacy strategy:

Produce actionable information — eleven percent (11%) of grantees reported having produced information that described strategic actions to influence issues and/or social problems, mainly through conferences, seminars, and speeches.

Effective collaboration — a third of grantees (33%) reported they successfully engaged in coordinated efforts with others to effect change on an issue or social problem.

Constituency supporting progressive issue(s) — a modest number of grantees (22%) reported they had

Graph 3



engaged their constituency base to effect concrete changes on specific issues or social problems.

Progressive infrastructure — only 22% of grantees had partnered with an organisation or individual that supported their social justice and advocacy strategy (other than Atlantic), mainly for the purposes of media promotions, funding, and research. Similarly, 22% reported they built a coalition of organisations that supported their social justice and advocacy strategy within their field.

Strategic social justice philanthropy — other than their Atlantic funding, only 20% of the grantees had received funding specifically targeted for implementing their social justice/advocacy work. Unfortunately, no grantee reported they had been encouraged by other funders to articulate their work beyond direct service to involve systemic level change.

Established research partnerships — twenty-two percent (22%) of grantees reported they had partnered with an organisation or individual consultant to design and conduct relevant research on social issues/problems. This was mainly done through partnerships with colleges/universities.

Survey Results 2013

Strategy 1: Grantees

In 2013, a final collection effort was made with the final core Atlantic grantees. The survey results revealed significant growth towards achieving the desired outcomes of the Atlantic grantmaking strategy. Results are presented in a comparative format to illustrate growth over time.

Short-Term Outcomes: Building Leadership and Organisational Capacity

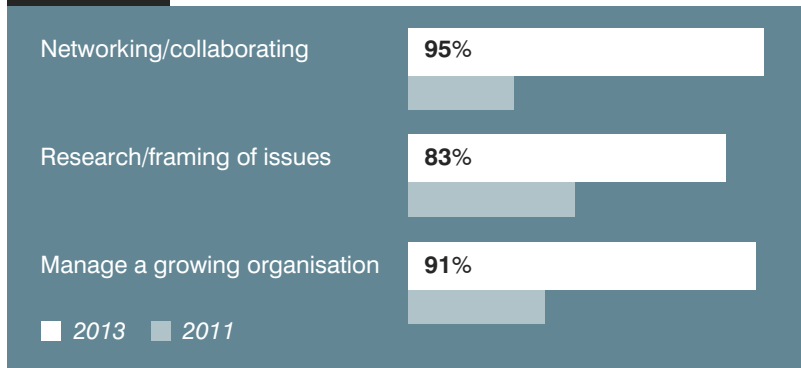
The ability of an organisational leader to lead, adapt, manage, and technically implement core grant activities including an advocacy strategy:

Manage a growing organisation — practically every grantee (97.7%) had sustained all of the nine targeted organisational structures:

- an articulated mission (100%)
- an articulated vision (100%)
- an articulated social issue/problem for which their organisation existed (100%)
- the ability to determine financial status (100%)
- a budget (100%)
- a governing board (100%)
- structured staff (100%)
- established organisational policies (83%)
- produced annual reports (67%)
- an evaluation strategy (67%).

Research, frame, and communicate — the majority of respondents (83%) regularly sought some type of advancing information about their work/cause from the general internet, the Bermuda Government website, local newspapers, local research reports, international government websites and newspapers, and local television/radio. Word of mouth still represented a viable form of information for 83% of

Graph 4



grantees. All of the respondents (100%) reported utilising the information to inform their own thinking, vision, strategy, and programme design.

Networking and collaboration with others — nearly every grantee (95%) reported they regularly networked and collaborated with others. All respondents (100%) said they had formal relationships with, convened, shared data, and planned strategies with peers/organisations within their field. Eighty-three percent (83%) extended these arrangements with peers outside their field as well. However, none had achieved a deeper level of collaboration, (i.e. having formal structural agreements, sharing technical resources, joint grant applications, or memorandums of understanding).

Mid-Term Outcomes: Increase Advocacy and Social Movement Practices

Evidence that an organisation has acquired and integrated social justice/advocacy theories and practices into its operations:

Integrate social justice theory into practice — increasingly Atlantic grantees had incorporated social justice principles into their organisations. Overall, 84% of grantees had integrated social justice theory into their practice in some way. Every

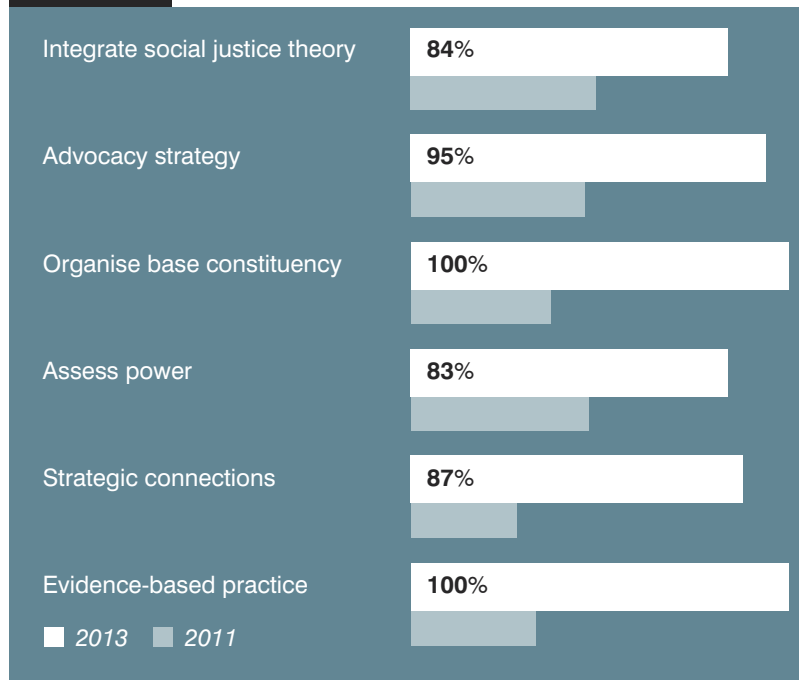
grantee felt that social justice was important to their work. Interestingly, each of them had varying definitions and/or understandings of social justice including:

- 1) All people have dignity and are entitled to basic human rights and equality of opportunity (33%)
- 2) The voices of the people most impacted by the problem need to be involved in solving them (17%)
- 3) Focus on root causes of disadvantage and inequality (17%)
- 4) Thrive for systemic, institutional and social policy change (33%)

Eighty-three percent (83%) reported having made efforts to deepen their knowledge of social justice theory by reading social justice literature, speaking with experts, and attending workshops and/or conferences. Eighty-eight percent (88%) of grantees reported they had publically articulated a set of organisational values/goals related to social justice. Eighty-three percent (83%) had incorporated these principles into their programme objectives and 67% in their internal organisational structures and practices. An increased number (67%) had developed a formal line of work in this area. In addition, the majority (83%) had actually identified root-cause factors contributing to the social problems relevant to their organisation.

Advocacy strategy — there was significant growth in the area of advocacy work among grantees (95%). The majority (80%) had developed a formal programmatic line of work devoted to advocacy. Every grantee (100%) had made a concerted effort to deepen their knowledge of advocacy strategies. All respondents (100%) reported having advocacy strategies of varying types evident in their work. The most commonly used were media advocacy to raise

Graph 5



public awareness (100%), coalition building/networking, and policy analysis/research (100%). Most had also engaged in lobbying (67%), grassroots organising (67%), policy analysis (50%), and monitoring policy implementation and enforcement (67%). In their efforts to tackle the root causes of their social issues, grantees endorsed having conducted several types of advocacy tactics, including letter writing (100%), lobbying (75%), internet/email campaigns (75%), physical barrier method (75%), petitions (50%), and rallies/marches (67%).

Organise base constituencies — all grantees (100%) had been busy identifying and organising/convening their base constituencies. The most common activities used to convene them were letter writing (100%)

Grass roots advocacy

Atlantic grantees **Two Words and a Comma** and **Centre for Justice** brought about policy change to prohibit discrimination on the basis of sexual orientation. Two Words and a Comma carried out a successful grassroots campaign to influence key leaders and public opinion. They engaged with the island's church leaders, who have traditionally been opposed to protections for same-sex individuals, and persuaded some of them to not actively oppose the proposed legislation. Two Words and a Comma also mounted an island-wide advertising campaign featuring a number of heterosexual people speaking against discrimination. Centre for Justice helped draft the final anti-discrimination bill. In July 2013, Bermuda passed legislation that outlawed discrimination on the grounds of sexual orientation.

and lobbying (80%). Many grantees (75%) had also used the internet via social networking sites to organise constituents. Everyone (100%) reported that they were in regular contact at least monthly.

Assess power — the majority of grantees (83%) had used at least one technique to map power dynamics. While only 33% of grantees reported they had successfully mapped the power dynamics that affect their work and/or client base, there were several indicators they were well on the way to understanding these complex factors. For instance, all respondents had identified key stakeholders through relationships with clients (50%), donors (60%), volunteers (100%), Government officials (100%), and the general public (100%) and faith-based organisations (67%). Furthermore, all grantees (100%) had made efforts to investigate stakeholder interests, characteristics, and circumstances. They reported they used this data to inform their work. This type of data gathering allowed grantees to identify areas of commonality between their stakeholder groups. All respondents

(100%) planned to use this data to gain traction among stakeholders to effect change.

Develop and strengthen strategic connections — in terms of developing more strategic alliances, 87% of grantees had made significant progress in this area. The majority of grantees (80%) reported having developed a formal partnership with at least one organisation with a common mission and common social justice goals (80%). Furthermore, 100% had initiated coordinated efforts with other organisations to influence legislative/system changes.

Implement evidence-based practices — there has been significant growth in evidence-based practices among grantees since last surveyed, with all respondents (100%) reporting they conducted issue/policy analysis on data to inform their advocacy efforts. Everyone (100%) had at least one method of collecting advocacy related data, including aggregating client records (100%), surveys (100%), individual interviews (80%), media analysis (80%), and focus groups (50%).

Long-Term Outcomes: Established Social Justice Organisations

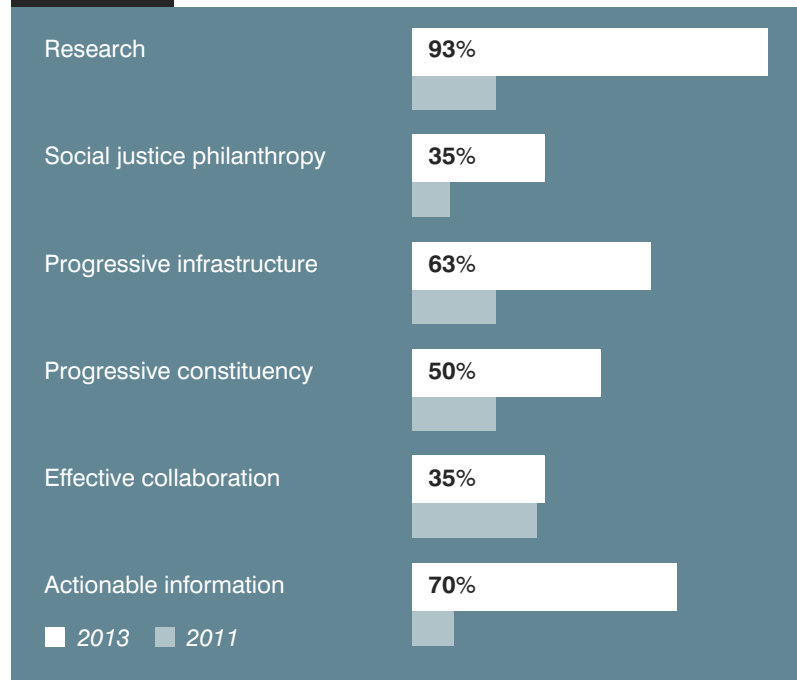
Evidence that an organisation has implemented a social justice/advocacy strategy:

Produce actionable information — the majority (70%) reported having produced actionable information that described strategic actions to influence issues and/or social problems, mainly through media articles, newsletters, press releases, conferences, seminars and speeches, and policy development.

Effective collaboration — a modicum of growth was seen, with just 35% reporting they successfully engaged in coordinated efforts with others to effect change on an issue or social problem. Of those reporting successes, 83% saw changes in the area of civic engagement, health (50%), race issues (50%), and gender issues (25%).

Constituency supporting progressive issue(s) —

Graph 6



only 50% of grantees reported they had engaged their constituency base to effect concrete changes on specific issues or social problems.

Progressive infrastructure — a good deal of maturity was revealed with 63% of grantees indicating elements of progressive infrastructure to sustain their social justice work. An increasing number of grantees (50%) had partnered with an organisation (other than Atlantic) or individual that supported their social justice and advocacy strategy. Of those reporting, all had utilised media (100%), legislative/lobbying organisations to strengthen their social justice efforts (100%). Technical support (67%) and research (67%) organisations were also used. Significantly, 67% had partnered with other

Grantee collaboration at its best...

Atlantic grantees **CURB**, **Youth on the Move**, and **Centre for Justice** mounted a campaign to end unrestricted stop and search by police, which was disproportionately imposed on blacks. Centre for Justice argued that the law underpinning stop and search was unconstitutional. CfJ organised a public forum that provided a comprehensive factual picture of the impact of the practice. The Centre's approach to the issue — framing it as an inadequate safeguard to protect individuals, resulting in disproportionate contact with police — gave it the legitimacy needed to continue talks with the police, who are now reviewing the practice. The Minister of Justice has also requested a briefing on the issue, which is an indicator that the government is taking the concerns seriously.

fundere for additional funds and/or in-kind support. Fifty percent (50%) had received social justice funding. An impressive 75% reported they built a coalition of organisations that supported their social justice and advocacy strategy within their field.

Strategic social justice philanthropy — other than their Atlantic funding, 50% of the grantees reported they had received funding for which they planned to direct towards implementing their social justice/advocacy work. Eighty percent (80%) of grantees reported they had not been encouraged by other funders to articulate their work beyond direct service to involve systemic level change.

Established research partnerships — Ninety-three percent (93%) of grantees reported that evidence-based practices were influencing their work in some way. They reported their organisation had changed focus and/or revised advocacy strategy to accommodate new understandings. Eighty percent (80%) reported they had partnered with an organisation or individual consultant to design and conduct relevant research on social issues/problems.

Strategy 2: Intermediaries

The survey revealed the majority of intermediary organisations provided training and resources that were on task with the strategy to strengthen the core grantees in basic organisational capacities, but fell short of providing more social justice/advocacy-focused knowledge and skills.

Short-Term Outcomes: Building Leadership and Organisational Capacity

The degree to which intermediaries provided capacity building support to facilitate organisational leaders' ability to lead, adapt, manage, and technically implement core grant activities including an advocacy strategy:

Manage a growing organisation — sixty percent (60%) of intermediary organisations reported they assisted Atlantic grantees in articulating their mission, their vision (80%), and articulating a social issue/problem for which the grantee organisation existed (80%). Sixty percent strengthened grantees' ability to determine their financial status, establish/restructure their governing board (40%), and support the development of an evaluation strategy (33%).

Research, frame, and communicate — unfortunately, none of the intermediary organisations reported providing assistance to grantees in seeking relevant and advancing information/data about their field/cause.

Networking and collaboration with others — none

Graph 7

Build organisational management capacity	52%
Support research/framing of issues	0%
Assist in networking/collaborating	32%

of the intermediary organisations reported providing assistance to grantees with brokering formal relationships with peers/organisations within their respective fields. However, 60% had enabled grantees to convene their peers around issues or shared interests. Interestingly, 40% assisted in brokering relationships between Atlantic grantees and their peers/organisations outside their field and 20% reported assisting the convening of these peers. Forty percent (40%) of intermediaries assisted grantees with sharing data with other organisations.

Mid-Term Outcomes: Increase Advocacy and Social Movement Practices

The degree to which intermediaries supported Atlantic grantees in acquiring and integrating social justice/advocacy theories and practices into their operations: **Integrate social justice theory into practice** — only 20% of intermediaries had enabled grantees to understand social justice theory. However, 40% reported they assisted grantees in developing a line of work to accomplish their social justice goals. Forty percent (40%) of intermediaries had helped

grantees to identify the root-cause factors that contributed to the social problems relevant to their work.

Advocacy strategy — in terms of advocacy strategies, 20% had assisted grantees in their understanding of these strategies and 20% assisted grantees in developing a formal line of work to aid in accomplishing their advocacy goals.

Organise base constituencies — twenty percent (20%) reported they assisted grantees in organising and convening their base constituency.

Assess power — While 47% of intermediaries reported they assisted grantees in assessing power, only 20% reported they had assisted in mapping the

power dynamics affecting grantee’s work and/or client base. A large number of intermediaries (80%) had enabled grantees to identify key stakeholders relevant to their work and 40% assisted grantees to investigate stakeholder needs and interests.

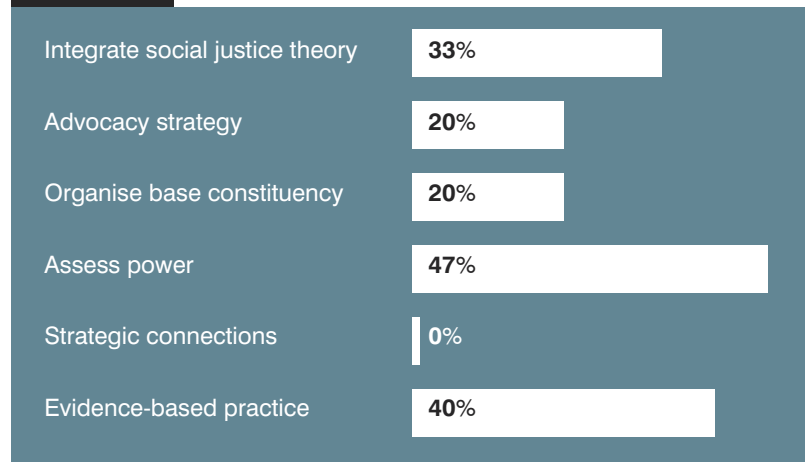
Develop and strengthen strategic connections — unfortunately, none of the intermediaries had assisted grantees to develop formal partnerships with common organisations.

Implement evidence-based practices — forty percent (40%) of intermediaries reported they enabled grantees to conduct issue/policy analyses on data to inform their advocacy efforts.

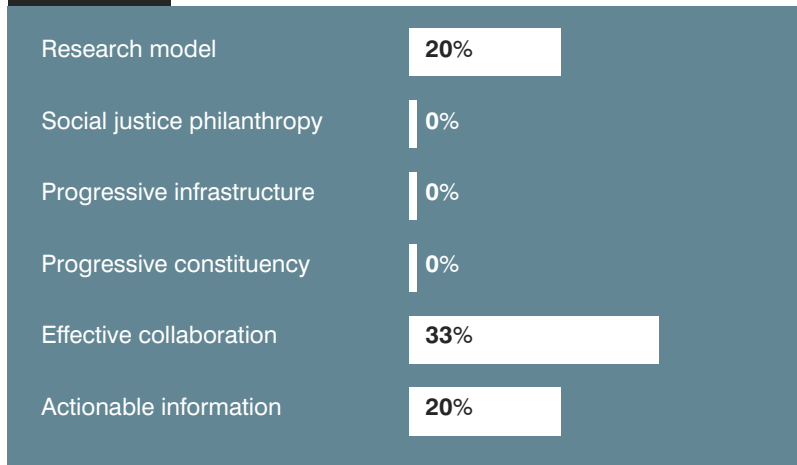
Intermediaries: Getting Results

Atlantic grantee **Age Concern** brought together government and nonprofit leaders to visit and exchange ideas with grantees in Northern Ireland and the Republic of Ireland that effectively influenced ageing policy. Working with Boston-based Atlantic-funded intermediary Root Cause, Age Concern developed a positive ageing strategy for Bermuda and mobilised its constituents around upcoming elections in 2012. Three forums were held for political candidates to better understand issues affecting older people. Age Concern documented the findings, and informed constituents and members of Parliament of the results. After the elections in 2012, the new government created a ministry for health and seniors, one of the key recommendations from the Age Concern forums. In early 2013, the government asked Age Concern to lead a task force to recommend a national ageing policy.

Graph 8



Graph 9



Long Term Outcomes: Established Social Justice Organisations

Evidence that intermediary organisations enabled Atlantic grantees to mature to the stage of implementing social justice/advocacy strategies:

Produce actionable information — twenty percent (20%) of intermediaries reported they enabled grantees to produce information that described strategic actions with the purpose of influencing issues and/or social problems.

Effective collaboration — similarly, 33% reported they enabled grantees to successfully engage in coordinated efforts with others to effect change on an issue or social problem.

Constituency supporting progressive issue(s) — none of the intermediaries reported they had assisted grantees to engage their constituency base to effect concrete changes on specific issues or social problems.

Progressive infrastructure — similarly, none of the intermediaries had aided grantees to partner with an organisation or individual that supported their social justice and advocacy strategy (other than Atlantic).

Strategic social justice philanthropy — outside their Atlantic funding, none of the intermediaries had received funding specifically targeted to support their ability to provide support to grantees in the area of social justice/advocacy work.

Established research partnerships — twenty percent (20%) of intermediaries reported they had facilitated partnerships between Atlantic grantees and other organisations or an individual consultant to design and conduct relevant research on social issues/problems.

Strategy 3: Advance Strategic Philanthropy

While building capacity among grassroots grantees proved challenging, an equally difficult set of work occurred among donors. As mentioned earlier, globally Atlantic was a pioneer in its field of strategic philanthropy, particularly as it related to social justice advocacy work. Some efforts were made in Bermuda to promote the practice of strategic philanthropy among funders.

Convening Funders: A key point of engagement was Atlantic’s participation in the Donor Forum and the Donor Forum Executive in Bermuda. The Donor Forum was comprised of the corporate and foundation representatives on the island. The Donor Forum Executive was a group of four of the larger funders (three corporates and Atlantic) that strategised and developed philanthropic resources. Through the Donor Forum, Atlantic was able to host topic-focused convenings for the larger membership of funders, which highlighted the work of Strategy 1 grantees that participated in capacity-building programmes. Atlantic also worked through the Donor Forum to elevate the discussion among funders on how foundations could more effectively support groups serving populations that are least

well off. For example, some of Atlantic's potential funding partners and Government policymakers participated with Atlantic grantees in the Aspen Racial Equity and Society Seminars. Not only did this give Atlantic grantees an opportunity to deepen their relationships with other donors, but it also afforded both parties the occasion to engage in meaningful social justice dialogue and build mutual goals.

Developing Funder Knowledge Resources: Perhaps the most comprehensive set of activities in Strategy 3 was the establishment of the Bermuda Civil Society Project (BCSP). This was an initiative launched in 2009 to map Bermuda's third sector to clarify how nonprofits and philanthropic stakeholders delivered on programmes and services. Its goal was to create sustainable structures and practices enabling the assessment of the third sector's capacity to meet and to make an impact on social needs. Atlantic convened and chaired a standing committee of nonprofit leaders (represented by The Family Centre, the Coalition for Community Activism in Bermuda, The Centre on Philanthropy), independent volunteers, and funders. Partner funders XL Foundation and Bank of Bermuda Foundation decided to also strategically invest in structural supports for Bermuda's third sector by providing both funding and participating in taskforce activities. The BCSP succeeded in laying the groundwork for a stronger and better-informed third sector in Bermuda. This was accomplished through six subcommittees: 1) Sector Audit and Analysis (Field Mapping); 2) Programme Measures of Effectiveness; 3) Civic Indicators; 4) Technology Platform; 5) E-Library; and 6) Advocacy. Each of these subcommittees also engaged content experts and other civic-minded individuals from the community. This type of rich collaboration produced many tangible products benefiting the third sector, including:

- Production and dissemination of the report *The Analysis of Social Service Agencies* that outlined findings from subsector convenings, led by the Inter-Agency Committee for Children and Families (IAC), including trends in relevant social issues and service needs, and the identification of a focus area for future services and funding.
- Production of the report *Who's Doing What to Whom?* that described the field mapping process and outlined a framework for mapping a continuum of services and respective organisations.
- Creation of a nonprofit mapping tool allowing for the mapping of more than 500 nonprofit organisations using a taxonomy that BCSP identified and adapted for Bermuda.
- Completion and limited dissemination of two technology platform concept papers that would later become the blueprint for the Bermuda Community Foundation technology platform.
- Completion of an E-library database system, managed by the Coalition for Community Activism in Bermuda (CCAB), that provided easily accessible, user-friendly and well-organised information and data reports about Bermuda social conditions.

With the collaboration of stakeholders across the island, each initiative produced tangible and enduring products and structures that strengthened the third sector in Bermuda. In December 2012, the BCSP was dissolved, as part of its three-year time-limited project plan, with each of the subcommittees either adapted by other organisations or their products being sustained by other nonprofit and/or governmental agencies. One of the most significant contributions of the BCSP was the modelling of collaboration across sectors. Also, the work of the BCSP influenced the trajectory of funding criteria and charity legislation. Together, the work of the BCSP represented a significant and lasting contribution to Bermuda.

Government Discussions: Atlantic also facilitated the growth of relationships between the Government, funders, and grantees, through a number of tactics such as challenge granting, convening and jointly advocating for legislative change to strengthen the local nonprofit infrastructure. Atlantic, along with other colleagues, made several presentations to Government with regard to private philanthropy. This input contributed to the proposed establishment of a Ministry for Community Development, which was to have responsibility for charitable legislation and third-sector relations.¹² Through the BCSP, Atlantic and other interest groups were able to urge Government to take a wider encompassing approach to the legislation on charitable and philanthropic activities. Additionally, a detailed proposal was presented to Government on how to better structure its work with the nonprofit sector to develop the types of partnerships that would foster better public/nonprofit communication. Despite the short-lived proposal for a Ministry of Community Development, a major win in this area was that new legislation regulating the island's charities was tabled in the House of Assembly on May 4, 2014. This new legislation, based on the UK's Charities Act (2011), took into account the feedback from various interest groups. Some major amendments to the law included the clarification of the meaning of 'charitable purpose' and what constituted 'charitable activity.' The law gave the Charities Commissioners the power to ensure that applicants met the public-benefit test and that benefits given to registered charities were consistent. It also strengthened the reporting requirements for organisations that applied for registered charitable status. Together, these enhanced criteria improved the functioning of charities helping to ensure that funding support went to organisations that met and sustained a set of basic requirements.

¹² Due to Government reconfigurations, this ministry did not come to full fruition. The work of the Charities Commission continued under the auspices of the Registry General.

Experiential Learning: Leader Study Tours

Atlantic made a significant investment in the learning experiences of its grantees. Leader Study Tour grants were given to select organisations to ramp up their learning curve by experiencing social justice and advocacy work up close. The tour provided the opportunity for leading local stakeholders in the ageing field to undertake a series of visits to organisations and Government departments across jurisdictions in which Atlantic worked. Six tours were crafted in the areas of ageing, social justice advocacy, gender equity, and strategic philanthropy that included leadership from grantee organisations and key stakeholders. Tour outcomes included: exposing a number of Bermudian NGO leaders and teams to evidence-based models of advocacy and social movement work across jurisdictions; facilitating the sharing of ideas with one another; implementing lessons learned, strengthening local networks; initiating collaborations to fill sector, information and capacity gaps; and building a stronger field of work.

Tours included:

- 1) *Ireland & Northern Ireland (Ageing)* — these tours were attended by several Bermudian delegates, Atlantic grantees (including board members) working in the area of ageing, and a Government official. Participants also attended the Age Friendly Cities Conference held in Dublin. It was the culmination of a global movement designed to engage cities in the development of Age Friendly policies and environments. Evaluation data revealed that Atlantic grantees:
a) Gained a greater systemic perspective on the issue of ageing and how poor social and urban planning has significantly contributed to the deconstruction of the community and had negatively impacted the growth and prosperity of many older adults. They also reported that due to

economic conditions, seniors were still in the workforce competing for jobs with younger generations.

b) Actions taken as a result of this learning experience included the: 1) promotion of the Age Friendly Cities Concept within the Successful Ageing Framework and Advocacy Campaign; 2) Age Concern (an Atlantic grantee and study tour leader) promoting the Age Friendly concept within the National Ageing Strategy; 3) utilisation of the Age Friendly Cities concept to revitalise dialogue and partnership with the Bermuda Government; 4) collaboration with the Family Centre (an Atlantic grantee), the Corporation of Hamilton, and the Economic Empowerment Zone to pilot the Age Friendly City concept in the City of Hamilton.

2. *South Africa (Advocacy)* — Atlantic-funded rights-based organisations working in the areas of human rights, youth development, racism, and LGBT rights were selected to attend this tour. The organisations explored their potential to do more advocacy work, and how and what that would look like in Bermuda. Consultation among grantees and with Atlantic led to the belief that the work of grantees in South Africa closely aligned with Bermuda’s social landscape and its human rights and social policy advocacy agenda and programming direction. Participants were able to explore the overarching advocacy strategies and tactics used by South African grantees. In addition, they were able to connect with a cross-section of stakeholders involved in work similar to their missions. Evaluation data revealed that as a direct consequence of this learning experience, Centre for Justice was able to articulate an advocacy tactic: *Through strategic litigation and strategic collaboration (on specific issues), [CfJ] will become effective in developing the widest*

and most purposive jurisprudence in human rights laws. They were also able to initiate two pilot programmes in 2012 promoting a culture of rights and responsibilities through an understanding of human-rights principles both in education and business.

3. *Barbados and London (Gender Equity)* — representatives from Amnesty International (Bermuda) and the Women’s Resource Centre were afforded the opportunity to attend the Ninth Caribbean Institute in Gender and Development studies intensive programme (CIGAD). As Bermuda’s economy continued to struggle, single mothers and children were among the most vulnerable to the downturn. The goals were to allow the participants to focus on creating legislation that would better women’s economic development in Bermuda. Evaluation data revealed that:

a) Participants experienced an expanded understanding of gender that contributed to an investigation into gender inequities in health insurance in Bermuda. Findings revealed: 1) structural inequities due to the national policy of linking health insurance to employment; and 2) that women paid, on average, \$2,000 more for individual health insurance than men.

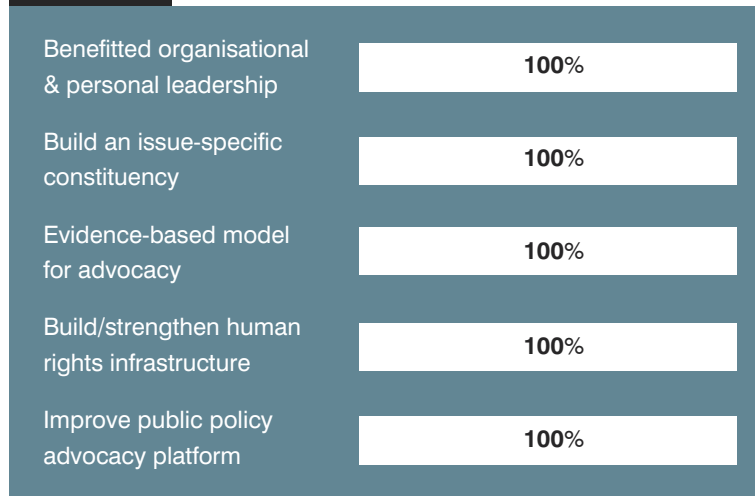
4. *United States (Community Foundations)* — with Atlantic’s goal of establishing a sustainable structure to continue strategic philanthropy in Bermuda, a group of delegates was selected to attend the National Community Foundations conference in New Orleans. Delegates included Atlantic staff, consultants, key stakeholder donors, and Bermuda Community Foundation steering committee members. The conference was organised around several learning tracks, including leading, building, and investing. The conference brought community foundation

Human Rights Advocacy in Bermuda

“We learned that poverty could be addressed by advocating for human rights based on the rights enshrined in the Universal Declaration of Human Rights (UDHR). The socio-economic rights in the Constitution of South Africa probably have the most applicability in Bermuda... While Centre for Justice must educate and advocate for the existing rights under the Bermuda Constitution, it must advance and advocate for socio-economic rights similar to those in the South African Constitution by reference to the UDHR.”

—Centre for Justice

Graph 10



representatives from around the US and other jurisdictions together to learn and network. Tour goals were to introduce the community foundation concept to key Bermuda stakeholders by further immersing current affiliates in the larger community foundation space. It also provided the delegates with more information to use to strengthen their potential local networks.

a) Key outcomes included: 1) the utilisation of key concepts to draft initial mission- and supporting-charter documents for a new foundation in Bermuda; 2) the establishment of the Bermuda Community Foundation; 3) the acquisition of a key contact that would eventually be contracted to design the Bermuda Community Foundation website.

Evaluation data revealed that this type of grantmaking, where significant funds were invested and purposeful experiential learning curricula were designed, paid off in major ways. This was particularly true as the bulk of grantmaking in Bermuda was to organi-

sations with little experience envisioning and conducting social justice and policy advocacy work. Participants were able to see exemplary models of the work being implemented to scale and they had the unique opportunity to expand their peer support network internationally.

Survey data revealed that participants unanimously endorsed their leadership study tour experiences as having great impact on their work by increasing their ability to develop and/or improve their public policy advocacy platform (100%), projects that build/strengthen human rights infrastructure in Bermuda (100%), evidence-based models for advocacy (100%), and their ability to build an issue-specific constituency in Bermuda (100%). All participants (100%) reported how the tours uniquely benefited their organisations and their own personal leadership. One participant wrote:

“We were involved in at least three Leader Study Tours. We used the tours as fact-finding missions to make cases for support for developing or growing specific initiatives. (e.g., Shared Nonprofit spaces, a National Ageing Strategy, a political advocacy campaign) all such initiatives that we now have a key development role in locally.”

Another participant revealed that the tours aided, if not catalysed, the vision for their long-term work:

“The main takeaway was that we are more focused on some of our goals, like the need for an Institute for Racial Justice and Reconciliation (IRJR). Our visit to Freedom Park gave us further insight as to how we might bring this about and how it can serve the community.”

The old adage that ‘seeing is believing’ couldn’t be more true as this participant described the results of

being able to see the day-to-day work of social justice advocacy demonstrated:

“We learned about specific strategies that we have to use to achieve our objectives. For instance, if we want to achieve a main goal, like achieving some form of racial equity in the workplace, we would have to start with the lower-hanging fruit and build up support along the way.”

While it is evident that benefits were garnered at the organisational level, several participants also benefited professionally and personally. As many of the Bermuda Atlantic grantees were early social justice advocacy pioneers, the opportunity to network with mentors in their field was invaluable:

“I met professionals who were working on similar projects or who had experience in areas that I am working on who were able to share information and contacts on how to develop specific projects and initiatives and who made themselves available for future contact if needed.”

These types of experiences were transformative for some grantees on both the professional and personal levels:

“We went to South Africa. Today we are reflecting on the life of Madiba Mandela. The meeting on Constitutional Hill with one of the architects of the constitution gave me insight into the resolve that is needed, as well as the kind of leadership that is required to accomplish social justice goals.”

This participant shared how a tour experience also had direct impact systemically:

“This trip was life changing. It helped to broaden our organisation’s horizons with regard to other

aspects of social justice and at the same time humbled us with respect to the conditions that others have to work under. Personally it inspired me to pursue post-graduate work in social justice, diversity and inclusion, with a major focus on racial justice. One outcome has been the creation of a curriculum entitled ‘Social Justice, Diversity and Inclusion: The Bermuda Context’ for the Bermuda College.”

There was no question that for these grantees, the opportunity to leave the fishbowl of a small community such as Bermuda and to see and learn about real work was transformative on many levels. Leaders from grantee organisations were able to expand and hone their practice in ways that could never be gleaned from a book or one-off seminar. The fruit of this investment would endure through the work of Citizens Uprooting Racism in Bermuda (CURB), which had actually drafted and submitted plans for an Institute for Racial Justice and Reconciliation (IRJR). Centre for Justice opened its doors and became a voice for human-rights advocacy in Bermuda.

Survey data suggested that Leadership Study Tours helped strengthen participants across several areas. Grantee organisations that did not participate in tours scored lower on key performance indicators. They were less likely to have:

- Engaged in successful coordinated efforts to effect change
- Developed a formal line of work to accomplish social justice goals
- Developed a formal line of work to accomplish advocacy goals
- Mapped the power dynamics of their social issue and/or constituency
- Created formal partnerships with mission-common organisations.

Ultimately, Leadership Study tours were also a great example of cross-fertilisation (grants supporting grants) across the Atlantic global network of grantees, as both mentor and mentee often benefited from such experiences. Atlantic brokered relationships between like-minded grantees that literally expanded their networks across the world. It was anticipated that grantees would be able to lean on their networks for much needed support in the years to come.

Final Capacity-Building: Strategic Learning Opportunities

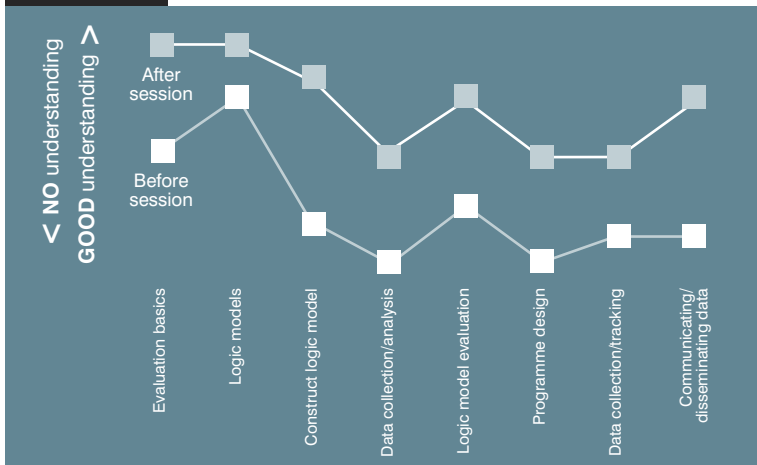
Towards the end of its grantmaking efforts, Atlantic Bermuda identified a set of core grantee organisations. These were identified based not only on their ability to capitalise on earlier capacity building support, but on their promise and potential for sustained advocacy at the systemic level. The deliberate and strategic decision was made to make substantial investments in growing their internal capacity for sustainability beyond the life of Atlantic grantmaking in Bermuda. Five key learning components were selected, including fundraising, financial sustainability, evaluation-impact assessment, constituency building, and communications. Together, these experiences were designed to bolster grantees' ability to perform these functions proficiently within their organisations. Not only would they be able to recoup precious dollars spent contracting out some of these functions, but also they would be stronger and more attractive grant applicants to the donor community. Before its spend-down period in December 2013, two of the five areas (evaluation and communications) were completed. However, the remaining three (financial planning, constituency building, and fundraising) had been grandfathered, in concept, into the new Bermuda Community Foundation.

Evaluation: Impact Assessment

A comprehensive six-month curriculum for capacity-building workshops and coaching sessions for key Atlantic Bermuda grantees was designed to strengthen their institutional structures and practices for long-term effectiveness and impact. A series of scoping and planning meetings was held to gather and frame information relevant to the capacity-building curriculum. A local evaluation consultant noted that with substantial investments made in core areas such as social justice, child welfare, women's rights, and the ageing, Atlantic Bermuda had created a cadre of grantees with the potential to achieve substantive impact in their respective areas; thus creating a strong imperative for social change at both the programmatic and policy levels. These organisations were poised to accomplish the objectives, yet lacked the internal capacity to assess their efforts to determine adherence to mission, achievement of objectives, and more importantly, to glean valuable learning to improve their practice.

With nonprofit organisations operating several initiatives with scant resources, such programme evaluation work often failed to be included in budgetary agendas. Unfortunately, many organisations approached this work only when prompted by funders desiring some measure of impact for their investments. It was not uncommon for organisations to outsource this function completely, while still deficient in their ability to provide data records necessary for an accurate evaluation to occur. While a degree of knowledge may have been gained for reporting purposes at that particular time, internal knowledge and skills remained unchanged. Furthermore, many organisations did not necessarily know how to use the resulting data to make important programmatic decisions moving forward. In this most common scenario, programme evaluation was a 'black box' and a valuable missed opportunity for

Graph 11

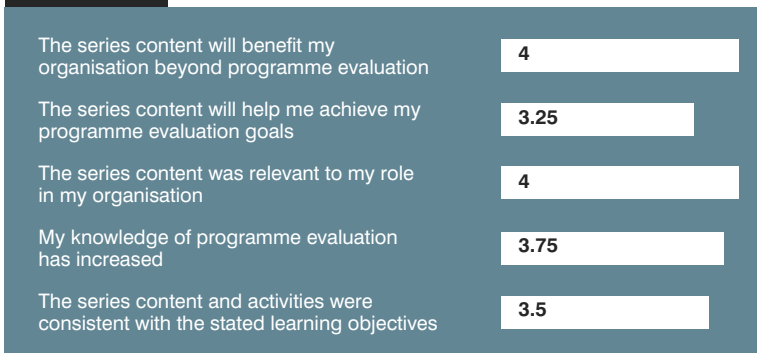


skill in terms of communicating programme effectiveness to funders.

Scope of work for this project included a dynamic curriculum designed to remediate (where necessary), deepen knowledge, and build skills necessary to understanding the importance and practical uses of programme evaluation. Topics included:

- 1) basic principles of programme evaluation
- 2) understanding, constructing and evaluating logic models
- 3) programme design
- 4) collecting, analysing and tracking data
- 5) communicating and disseminating data.

Graph 12



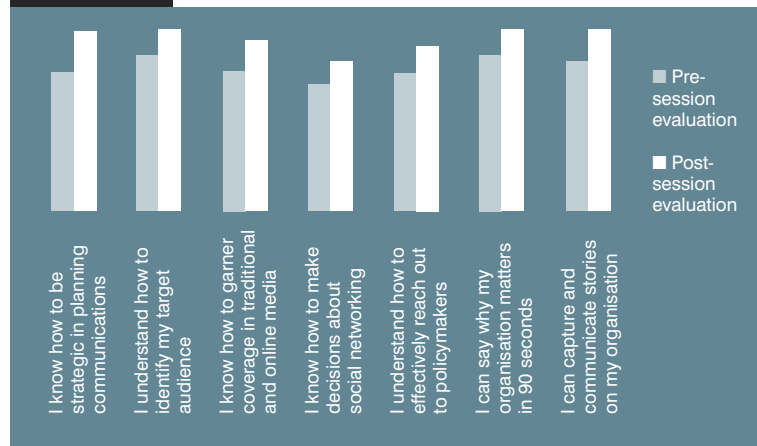
Upon completion of the six-month course and individual coaching sessions, participants reported an increased appreciation and understanding of programme evaluation. Pre- and post-tests revealed there was evidence of increased understanding across all eight course topics. The goal was to have every session be of practical value for their specific organisations. Every session required the use of real organisational data during the discussions and exercises. Participants left the course with an organisational theory of change, as well as organisation- and programme-specific logic models. Overall evaluations indicated participants both valued the topics and believed the information and skills would benefit their organisations.

Communications Capacity Building

Through Atlantic’s global communications team, key Bermuda grantees had the opportunity to participate in a communications training programme entitled ‘The Spin Academy.’ Participants were supported in developing and implementing a strategic

learning and improvement. Atlantic believed a key imperative for successful organisations was the ability to assess their work and make the necessary changes needed to meet stated goals and objectives. Notwithstanding the importance of external evaluation, organisations needed the internal capacity to set measureable objectives, collect data, and analyse their work on an ongoing basis. This was deemed crucial to creating sustainable work with long-term measureable impact. It was also a valuable

Graph 13



communications plan. The trainings and the follow-up activities would ensure they had the capacity to implement successful communications strategies to achieve their goals. Atlantic believed a successful public profile required the capacity to tell a clear, compelling story of their work. When grantee objectives include influencing and shifting the public discourse, and ultimately affecting policy change, these skills were non-negotiable. Bermuda grantees participated in and confirmed that the training empowered them to become stronger communicators, and built their organisational capacity to use communications to reach their goals.

Overall, these experiences had a significant impact on grantee organisations. With the completion of the evaluation course, grantees had detailed logic model and theory of change documents that could be used to improve their work internally but to also better communicate their work objectives with their current funders, board members, and the greater public. Better equipped with concise theories of change and evaluation plans, it was expected that grantees would be able to produce stronger proposals

and become more attractive investments for future funders. The opportunity for dedicated time to examine the work of their organisations was appreciated. One grantee reported: *“I valued putting aside analytical time to think through past assumptions and had critique from my peers.”* The format of combining teaching/problem-solving sessions with individual coaching sessions was also very effective for participants. Another grantee reported: *“The companion coaching sessions sealed the deal on this work. The theory was clear and presented in a straightforward way. The coaching helped so much with the implementation.”*

Grantees were also able to integrate their learning from the communications seminar. In particular, Citizens Uprooting Racism in Bermuda (CURB) articulated that they changed the way they communicated information to the public: *“We [CURB] thought about releasing our racial justice platform and our plans for an institute but after attending the ‘Spin Academy at Atlantic’ we learned to time the releases separately and to be more effective in the messaging. We had our first ever press conference. Our capacity for social advocacy was strengthened.”* The Centre For Justice also began to ramp up its communications strategy as well as reframe how it was articulating legal issues to the public. For example, one participant reported: *“We realised that our inadequacy was a lack of social media participation...we put in place a time-frame for building a social media presence including Facebook and a website. Also, in trying to bring about change and impact, we shouldn’t lose sight of the human story. For stop-and-search, we put a face on the problem. A young black male stopped nine times in five months. The police kept him on a technicality and he had to spend a long weekend in custody and it turned out to be a mistake anyway. You weave this story into the advocacy work.”*

PART THREE

Discussion: Significant Growth and Progressive Outcomes

Atlantic had undoubtedly made a considerable contribution to the island of Bermuda. Many of the investment strategies were carefully planned and executed, and the long-term impact was promising. While the initial evaluation of the work indicated modest growth in key objective areas, it was important to note this ambitious grantmaking strategy was implemented in a context unlike many of the other Atlantic jurisdictions. Continuing with the earlier metaphor, the ground had to be tilled, seeded, fertilised, and nurtured. To achieve its goal of impacting the lives of the most vulnerable citizens through meaningful systemic change, Atlantic Bermuda had to identify and literally establish grassroots organisations that could partner in this endeavour. Furthermore, thoughtful grantmaking was made to literally build the capacity of these organisations to function on a daily basis. Extensive work was done to assist grassroots organisations in understanding social justice and advocacy strategies, which allowed them the latitude to internalise and adapt for their respective causes. Additionally, strategic grantmaking was made to larger established direct-service organisations to assist them in identifying and developing new lines of work that addressed root causes of the social issues that affect their clients.

Longitudinal survey data revealed significant growth trends across all Strategy-1 outcome areas for grantees. Survey scores on many of the indicators were doubled and sometimes tripled from 2011–13. All core grantees surveyed had successfully

launched a media strategy including articles, publication press releases and websites. The majority had developed and disseminated policy (75%) and topic reports (67%) for the Bermuda Government. All core grantees had sustained fundamental organisational structures such as an articulated mission, vision, budget, governing board, and human resources procedures. Every organisation reported it had articulated an issue and or social problem for which it existed to address. This was significant because many organisations had experienced ‘mission-creep’ as they sought to follow sporadic trends in funding. Sixty-seven (67%) percent of core grantees reported having a strategy for programme evaluation. While it was hoped every organisation would have developed a strategy to measure effectiveness, there was a vast improvement since the first survey. A larger number of grantees indicated a higher level of systemic thinking than last surveyed. Eighty-three percent had moved beyond conceptualising issues in an isolated manner to a more complex understanding. They reported they had identified root-cause factors associated with their social issues.

Grantees were able to achieve powerful results when they collaborated with one another. However, while all grantees reported having formal relationships with peers/organisations in their field, none had achieved a higher level of collaboration that included formal structural agreements like sharing technical support resources, joint grant applications, or memorandums of understanding. In an environment where grant dollars were disappearing, it was hoped that more long-term strategic collaborations would be made; especially for its grantees whose

Every organisation reported it had articulated an issue and or social problem for which it existed to address. This was significant because many organisations had experienced ‘mission-creep’ as they sought to follow sporadic trends in funding

Systemic impact: significant grantee achievements

Age Concern

Advocated successfully for reformation of a ministry focussed on health and seniors

Centre for Justice & Citizens Uprooting Racism in Bermuda

Secured reviews by police and government of unconstitutional stop-and-search practices by the police

Two Words and a Comma & Centre for Justice

Secured legislation that outlawed discrimination on the grounds of sexual orientation

Coalition for Community Activism

Secured strengthened legislation protecting public access to information

social justice efforts were not generally funded by the greater donor community. Fifty percent (50%) had reported they had developed partnerships, beyond their relationship with Atlantic, to support their social justice work. Unfortunately for those grantees, where Atlantic had been the main (if not only) organisation with which they had partnered to encourage and or support their social justice work, a failure to expand their social justice partners would probably have dire outcomes. Survival would probably prove difficult in the wake of Atlantic's closing in 2013.

Nevertheless, the data suggested a real promise for sustained social justice work for many of the Atlantic grantees. The strategy to 'front-load' significant investments towards creating stronger organisations, coupled with intermediary grants providing direct technical assistance, proved to be the right combination for the Bermuda grantees. Furthermore, the purposeful investment of resources to demonstrate and help craft a line of work to achieve social justice advocacy work had elevated much of the work from an individual-level to a more systemic-level perspective. The table at left highlights some of the major accomplishments of Atlantic grantees.

Finally, Atlantic endeavoured to educate and influence the donor community about strategic philanthropy and evidenced-based decision making with the objective that they would gain a new understanding and appreciation of the importance of supporting social advocacy work. This was truly an uphill battle that proved to be rewarding and educative in many ways. There were several tangible gains made in this area with the work of the donor forum and particularly the Bermuda Civil Society Project. However, survey data from grantees revealed there was little to no grantmaking made to social justice advocacy organisations to further the gains made

from Atlantic investments. As feared, the absence of Atlantic in the grantmaking space would leave a severe vacuum for these organisations. For many of the grantees, Atlantic had been the main, if not the only, organisation with which they had partnered to encourage/support their advocacy work. Over half (67%) of time-two survey participants reported they had established a partnership with a funder. While this could represent a promise for sustained social justice advocacy work for Atlantic grantees and others, it was unclear whether these grants represented the beginning of a shift in funding focus for local grantmakers. One respondent said: *"We do not frame requests under the social justice mantra only; instead we solicit general donations to support operational activities of education, convening, advice and referrals. The data and interaction we garner from these activities is then used as a basis of support for our advocacy work, although such work is not earmarked specifically as social justice."* This suggested the majority of donors had not incorporated this type of work into their purview of important causes to support. This could have been for many reasons, including a long-standing history of 'charitable' type giving specifically to support cultural activities/events and/or to ameliorate pressing social issues via direct service. Another reason could have been that many of the grantmaking institutions had not developed a detailed giving strategy and continued to base their giving on the preferences of senior leadership. While Atlantic did not appear to greatly influence donors to move towards strategic philanthropy or to fund systemic-focused advocacy work, Atlantic did achieve modest gains through spheres of influence and directly modelled what strategic philanthropy could achieve. The hope was that the seeds planted would one day germinate into meaningful strategic philanthropy among donors on the island.

PART FOUR

Grantee Highlights

As the Atlantic Bermuda Programme approached spend-down in December of 2013, aggressive plans were put into place to leave a sustainable legacy beyond its previous contributions. Three such grants were representative of the grantmaking strategy to build and leave behind strong social justice advocacy organisations and to advance strategic philanthropy. These grantees were Citizens Uprooting Racism (CURB), Centre For Justice, and the Bermuda Community Foundation.



Citizens Uprooting Racism in Bermuda (CURB)

In its hopeful beginnings, Citizens Uprooting Racism in Bermuda emerged as a dedicated group of volunteers in the wake of a diversity meeting to discuss racism held at the Bermuda College in 1998. After information and brainstorming sessions, the group soon to be known as CURB formed to stand at the forefront of confronting racism on the island. The group organised into various sub-committees to address racism across several key sectors including economics, spiritual/religious

beliefs, education, legislation, political, social and personal responsibility, and media.

However, lacking formal organisational structures and funding, the fervor diminished over time. In the 2005 Throne Speech the Government conceded racism was a problem and began to provide assistance to organisations to address the cause. The Commission for Unity and Racial Equality (CURE) contacted the original members of CURB in an attempt to revive the organisation. As a result, CURB was resurrected and became a registered charity in 2006 as an association of

volunteers whose sole aim was the eradication of racism in Bermuda and the reduction of its effects. With a one-time seed grant from Government, CURB began to host public events, workshops, and discussions. However, it was still an organisation dependent on volunteers. One member explained: *"[The Government grant] was very limiting to what we could do. We did not have an office, or any staff or anything like that and basically we were running CURB out of a home. All of the funds went to activism and of course did not go very far. I think we had a few thousand dollars left when we got the grant from Atlantic."*

Despite the humble rebirth of the organisation and dwindling funds, CURB members remained dedicated to and focused on their cause. They developed a clarified vision, mission, and set of values that would evolve over time but remain core to their beliefs. Values included: 1) *racial justice* — CURB would

"We believe that together we can finally make a real difference in the ongoing challenge of uprooting racism in Bermuda"

—CURB, 1998

Vision

“A Bermuda where skin colour favours no one.”

Mission Statement

“CURB is a non-governmental organisation of volunteers working to identify and dismantle racism in all its forms and to address its effects on our community.”

Values

Racial Justice • Respect • Authenticity • Courage
• Empowerment • Effectiveness

work to address the injustices and the impact of racism, both past and present, and proactively reinforce policies and practices that produced equitable power, opportunities and outcomes for all; 2) *respect* — CURB worked to provide opportunities for all voices to be heard and made an unconditional commitment to respectful behaviour; 3) *authenticity* — CURB members would live by anti-racist beliefs and principles;

4) *courage* — CURB members would lead by example by actively confronting racism in all spheres of influence; 5) *empowerment* — CURB would provide opportunities for the development of leadership, facilitation and communication skills to facilitate a culture of antiracism; 6) *effectiveness* — CURB would be efficient and productive in its internal operations and in external campaigns. It would strategise and act to maximise results.

The Game Changer

In 2009, Atlantic made a substantial investment in CURB that elevated its work and changed the course of the organisation. Driven by volunteer efforts, CURB had historically invested its meagre funds back into the community via training and education. The partnership with Atlantic afforded the first opportunity to build the internal capacity of the organisation, enabling CURB to hire a staff member and acquire office space. Beyond the convenings, workshops, leader study tours, and intermediary supports provided by Atlantic, CURB leaders utilised their Atlantic funds to participate in training and certification courses overseas to further strengthen their ability to achieve their mission.

Along with a refined vision, mission, and values

statement, CURB grew in its ability to articulate a more focused set of work activities. It sharpened its concentration to four main areas:

1) *Truth and Reconciliation* — a process focusing on healing and uniting communities divided by past injustices, the legacy of which continued into the present day. CURB intended to carry out the following:

- Tell the story that had not been told
- Explain the legacy of the past, create awareness
- Begin the process of reconciliation and rebuilding
- The Truth and Reconciliation Project
- Start a Truth and Reconciliation Fund
- A biannual Racial and Social Justice Conference

2) *Raising the Awareness of Racism* — this was accomplished through education around white privilege, internalised racism, African-Bermudian history, and social justice in order to change stereotypes, attitudes and perceptions.

The specific areas were:

- Understanding and addressing white privilege
- Understanding and addressing internalised racism
- Understanding and addressing structural racism
- Understanding and addressing the root causes of social dysfunction
- Creating an awareness of and disseminating knowledge of black Bermudian history
- Researching racism as the need to better understand issues intensified
- Writing/suggesting articles and opinion pieces of interest, recommending books of interest and archiving of information

- Creating a public education media campaign that included radio, television and newspaper and CURB website and Facebook pages.

3) *Redistribution of Power, Resources and Opportunities* — this was facilitated through the evaluation and recommendation of legislation, and a review of societal practices that maintained structural racism, with the aim of fostering a more equitable society. They positioned themselves to:

- Become a voice for grassroots activism empowering others
- Develop strategies for dealing with the media
- Engage in advocacy campaigns around significant issues such as workforce equity, the Police and Criminal Evidence Act (PACE)
- Review social practices with a view to shaping more equitable behaviour.

4) *Capacity Building* — this work was achieved by training and continuing to educate CURB members and others. Specific areas to address included:

- Organisations and leadership
- Engagement and training of those outside of normal CURB circles
- Diversification of funding
- An enhanced web presence and e-communication process
- The collaboration and networking with like-minded organisations
- An enhanced CURB reputation
- Workshops that provided training in Social Justice, Racial Justice, Restorative Justice and Structural Racism
- In-reach sessions for CURB Council, general members and supporters
- Partnerships with academic institutions

By 2010, with the closure of the only governmental organisation focused on racism, CURB became the sole organisation of its kind fighting racism in Bermuda. Armed with better tools and strategies, CURB began a more aggressive public campaign including education and awareness-building, as well as direct social advocacy. In 2011, in partnership with the Chewstick Foundation (an Atlantic grantee), CURB hosted the showing of the film *500 Years Later*, a documentary exploring the lasting impact of slavery and colonialism. As a result of attending the Aspen Roundtable on Structural Racism course, sponsored by Atlantic, CURB conducted ground-breaking workshops on structural and institutionalised racism. These workshops continued to be a mainstay for them as they moved beyond public venues to conducting the workshops for stakeholders, who represented gateways to opportunity and equality, such as the Ministry of Education and local corporate human resources departments. CURB also garnered success in having the training courses certified by the Bermuda Human Resource Association and Bermuda Educators' Council.

Advocacy Wins

With a long history of advocacy, CURB was able to fully benefit from the capacity-building learning opportunities afforded by Atlantic. The following two examples exemplify its aptitude for advocacy and its growing capacity to have real impact in the area of racism, both symbolic and practiced.

Tucker's Town

Tucker's Town, a home to the elite and argued to be one of the most beautiful and now most expensive areas in Bermuda, was slated to undergo a major development project including the expansion of a luxury hotel and private recreational areas. This little piece of paradise had historical significance to black Bermudians, as homes there had been purchased

in the 1920s and the community scattered to make way for the Mid Ocean Club development. As illustrated on the CURB website: “The original Tuckers Town represented a Black community initially of free Blacks, and later of emancipated Blacks who struggled and successfully created a safe and isolated environment for their families by building their own school and church, and creating a community made up of land-owning farmers, pilots and fishermen. Women grew vegetables and fruit to feed their families, to sell in St. George’s, or barter with others in the community. Children grew up in an environment supported and protected from the prejudice and discrimination that awaited them outside the protection of their community. A letter to the editor in the late 1890s described the area as idyllic with citrus groves and fig trees, neat homes and gardens, and friendly and industrious people. All this [was] achieved despite an environment of racism, prejudice, discrimination, oppression and disenfranchisement... The land was taken under the pretext that it was for the betterment of all, when in fact it was for the enrichment of the developers and the subsequent enjoyment of an elite few... Black Bermudians were forced to give up their lands for the ‘betterment of Bermuda’ and ‘for tourism’... In the 1920s three of the Bermudian developers were also members of Government, helping to pass the legislation ordering the compulsory purchase of land... The taking away of land (equity) from the Black community in the early 1920s resulted in substantially fewer opportunities for their descendants... The destruction of historic buildings important to black Bermudian history located on this site had continued up until recent times representing an ongoing intention to ignore that particular history.”

CURB partnered with the Bermuda Environmental Sustainable Taskforce, Tucker’s Point Historical Society and the Bermuda National Trust on a

campaign to challenge a local Special Development Order (SDO). The matter was considered urgent as the Government had already granted the SDO in principle, but under new transparency regulations it was to be debated in the House of Assembly before it went to the Department of Planning for final approval. CURB launched a full advocacy campaign and urged the public to contact MPs, Government officials, and the press, and to also use social media to share the message and to express their concerns about the proposed development. This issue represented an opportunity for CURB to demonstrate how organisations with seemingly different missions could collaborate to advocate for a common cause. It also helped CURB to reposition its message and demonstrate the growth of its reach to its 2,700 supporters and members. While the SDO did pass, CURB’s efforts could be applauded as a model of social activism at its best.

Police Stop-and-Search

CURB partnered with other Atlantic grantees, Centre for Justice and Youth on the Move to put an end to a form of police racial profiling known as a ‘stop-and-search.’

The three organisations sought the repeal of Section 31F of the Criminal Code, a legislative clause that effectively gave the police unrestricted stop-and-search powers. These practices were reportedly put into place in response to rising gang violence on the island. Police Service statistics revealed that stop-and-search activity had increased from 3,500 people in 2009, to 9,600 people in 2010 to 10,300 people in the first part of 2011. A snapshot survey produced by the Police Service revealed 85% of people stopped were black, and 5% reported as mixed-race, resulting in 90% of police stop-and-searches involving people of colour. An overwhelming majority (85%) of the people stopped were male.

Encouraged by a legal opinion confirming their position, CURB engaged the Commissioner of Police, the Attorney General, the Bermuda Governor and numerous Government ministers, to request a review of the legislation and its application. Opinion pieces and letters to the editor were written, and statistics were included in the structural racism workshops to demonstrate the presence of ongoing systemic racism. Similarly, on the same issue, Centre for Justice had taken the view that the powers granted to police under the stop-and-search clause were in breach of the constitution, because individuals had no safeguards. Reporting on the impact of stop-and-search on black males, Youth on the Move pointed out that even in the absence of reported criminal activity, people with unpaid parking tickets and other minor civil offences were booked by police and, in extreme cases (5%), were arrested and jailed. The groups took both separate and collective advocacy positions on the matter, and organised a joint public information forum. They also submitted positions to policymakers, unilaterally. This was not only a prime example of social justice advocacy in action, but also an example of victory through collaboration. While the law had yet to be repealed, stop-and-search activity decreased significantly following this campaign.

Looking Ahead

CURB truly exemplified an organisation with laser-like focus on social justice advocacy. One of its first advocacy efforts to save the historic Lane School building from demolition, a significant site in the early education of black Bermudians following emancipation in 1834, ended up being one of their most noteworthy endeavours, with the site being made into an historic protected building by the Government. CURB had hoped to utilise the Lane School building to house the organisation and to become the site of Bermuda's first Institute of Racial

Justice and Reconciliation as well as a museum. Due to funding constraints these ambitious plans did not materialise, but it was clear that CURB was better positioned to accomplish such a grand project to institutionalise social justice in Bermuda.

With Atlantic's support, CURB was able to create a unique brand that represented strong advocacy backed by a breadth of knowledge. CURB leaders had become content experts in many knowledge areas pertaining to social justice and understanding racism both locally and internationally. CURB was often sought after by many governmental and media stakeholders to communicate its position on various issues. During the 2012 elections, it developed a racial justice platform to show how the Government could enact policies to stem the tide of institutional racism. CURB leaders contributed to relevant international conferences such as the White Privilege Conference held in Minneapolis where it presented a workshop entitled, "This Land is Whose Land? Gaining Economic Citizenship in Paradise," and Columbia University's 2013 annual conference entitled "Historical Justice & Memory: Questions of Rights and Accountability in Contemporary Society," hosted by the Alliance for Historical Dialogue and Accountability (AHDA) programme and the Institute for the Study of Human Rights at Columbia University. Other noted local engagements included conferences held in Bermuda such as the 2010 African Diaspora Heritage Trail Conference, 2012 Racial Justice Conference, 2013 Bermuda Union of Teachers Conference, and the 2014 Centre for Justice's Conference on "Justice Today: Human Rights since Emancipation." In all, its activities represented the power of investing in building the capacity of grassroots organisations to become mature and effective in their efforts to effect social change.



Centre For Justice

Centre for Justice (CfJ), one of three organisations in Bermuda started with Atlantic funding, was an independent, non-governmental organisation with the mandate to promote and advocate for human rights, civil liberties and the rule of law through independent research and analysis. The need for such an organisation arose from the basic belief that a

hallmark of a modern democracy was a legitimate and genuine human rights watchdog. Bermuda had no such entity. Atlantic believed this could be possible in Bermuda and sought to fill this important void. Established in 2011, the conceptualisation, research, and planning took 18 months.

In 2009, Atlantic's programme executive approached a local attorney, well versed in human rights, about developing a grant proposal for a human rights advocacy organisation. It was important for Atlantic that the organisation be an independent apolitical entity. The attorney

conducted extensive research on international models and found that independence and objectivity were a constant across the UK, Ireland, the US and South African models. Advice and guidance was also garnered from fellow legal colleagues on the island.

Fulfilling its Mission

Centre for Justice (CfJ) was formed to enable everyone in Bermuda to understand the law and, consequently, their rights under those laws. While the issues CfJ faced over time varied, two things remained unchanged: its commitment to non-partisanship, and its intention to be accessible to all people. CfJ accomplished these goals by: 1) raising awareness and educating the community on their human rights, civil liberties and the rule of law by conducting research and making it publicly available; 2) fostering interest in civic engagement through activities which sought to safeguard human rights, civil liberties and the rule of law; 3) providing specialist legal advice where a miscarriage of justice may have taken place; and 4) where appropriate, intervening as a third party in court proceedings in cases that involved human rights and civil liberties.

While still in its beginning stages, CfJ began to provide valuable services to educate and raise the awareness of Bermudians and visitors through the publication and dissemination of leaflets on various points of law that included:

"What do I do if I am arrested?" — This leaflet provided valuable information in the event someone was in police custody without a lawyer. It guided the reader through his/her rights in custody, participation in an identification procedure and how to get free legal advice.

Guide to Traffic Offences & Procedures — This leaflet assisted drivers who had been issued a traffic

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- Foster interest in civic engagement through activities which seek to safeguard human rights, civil liberties and the rule of law;
- Provide specialist legal advice where a miscarriage of justice may have taken place;
- Where appropriate, intervene as a third party in court proceedings in cases involving human rights and civil liberties.

ticket or summons to court for a motoring offence. It focused on such topics as: being stopped by the police, disqualification from driving, the responsibilities concerning parking, seatbelts and vehicle maintenance. The leaflet also contained an appendix of the more commonly encountered offences and associated penalties.

As part of its mission to encourage civic engagement, CfJ produced publications that taught young people about their rights and responsibilities under the law. The guide, entitled “Know the Law: It’s Your Right,” gave middle-school students in Bermuda the opportunity to learn basic laws and understand their rights and responsibilities. It was developed in consultation with key stakeholders, including middle school students, educators, child welfare professionals, law enforcement professionals and community leaders. The guide provided an overview of the legal landscape and encouraged readers to consider the consequences of their actions, the choices available to them, and the resulting impact of those choices on themselves and others. The guide was accompanied by a 10-hour class component that CfJ conducted at a local middle school as part of this initiative.

Centre for Justice also fostered civic engagement through a multitude of advocacy strategies such as petitions, letter writing campaigns, and public forums. Topics addressed included the freedom to information, the prohibition of harassment, sexual orientation, and the stop-and-search law. For example, on the eve of the 2012 general election, CfJ invited key players in the community to talk about policy and legislative changes they believed were needed to enable Bermuda to work towards strengthening human rights. Hosted by CfJ, the roundtable discussion was designed to explore how the economy impacted human rights and social justice programmes. The Centre’s Managing Director

said: “*Centre for Justice believes it’s important to have this discussion before the general election... As members of the community, we all have a duty to let political candidates know what changes we expect from our next Government. They need our input.*” The event was also an exemplar of collaboration between Atlantic grantees: four of the five participating organisations on the platform were Atlantic grantees (Age Concern, Family Centre, CURB, and the Women’s Resource Centre). The event was televised on a local station.

Centre for Justice also provided specialist legal advice on important issues. For example, it prepared a policy brief for the Government addressing the question of discriminatory harassment. This arose because, in the approval of amendments to the Human Rights Act, the legislature included a provision on harassment. This provision would have shielded police from human-rights complaints resulting from stop-and-search activities. A vocal opponent of the stop-and-search practices, CfJ acted quickly to weigh in on the matter through the use of multiple advocacy tactics. Its actions proved successful as the amendment was defeated.

Righting Wrongs

True to its mandate, CfJ worked on several issues impacting Bermuda’s citizenry. While these issues ranged from mundane to highly contentious points of law, they were all of interest to the public. For example, CfJ publicised that the common practice of clamping cars in the city of Hamilton was, in fact, illegal. The Corporation of Hamilton’s 2007 Ordinance that was supposed to give the city the power to

“In any real democracy you need an independent organisation that critiques civil liberties and the rights of people, and their government’s ability to enforce/enact them. It must be non-partisan. Education and raising public awareness is a top priority. People need to be informed so that they can engage in Democracy.”
— Centre For Justice

enforce the wheel-clamping policy was never gazetted as required by law and therefore was not legal. Through newspaper articles and interviews, CfJ explained the law and how claims for refunds could be made by the public.

In another move to protect the rights of the public, CfJ took the Director of Public Prosecutions (DPP) to court to ensure more fairness and transparency as it related to the “charging guidance” under Section 36 of the Police and Criminal Evidence Act of 2006. The guidance outlined when the police were permitted to issue formal cautions in place of pursuing criminal prosecutions. The case was settled and the Government agreed to publish the “charging guidance.” CfJ continued to push the Government to place the cautioning programme on a firm statutory basis.

Centre for Justice strongly advocated for the repeal of Section 315F of the Criminal Code, which permitted police officers to stop and search individuals without reasonable suspicion. Through public forums, newspaper articles and interviews with the media, CfJ publically denounced the practice and deemed it unconstitutional. It also reported the practice would have harmful effects on young people (particularly black males), and severely undermine the community policing. CfJ again collaborated with other organisations (many of them Atlantic grantees) to get traction on the issue. The Centre hosted its first public forum on “The Balance between Public Safety and Liberty: Police Stop and Search Powers.” The panel included Government and elected officials, the acting police commissioner, a local economist, and other stakeholders. The panelists provided diverse views and offered different perspectives on public safety, police powers and constitutional rights. Buoyed by a major victory in US federal courts declaring stop-and-search

unconstitutional, the Centre and Citizens Uprooting Racism in Bermuda continued to work to have Section 315F repealed. It met with numerous police and political leaders throughout 2011 and 2012 advocating to have Section 315F removed. The advocacy began to see success as stop-and-search figures dropped from a high of 17,500 in 2011 to 5,555 in 2012. With a repeal of the law as its final goal, CfJ and CURB continued to fight this practice.

Centre For Justice proved to be a potent and much-needed voice even in its early years. The Centre had already sparked major discussions through public meetings, newspaper columns and a televised roundtable on the topics of Police stop-and-search powers, Your Right to Know, human rights and sexual orientation, and the economy and the link to human rights and social justice. CfJ was invited by two separate parliamentary select committees to conduct independent research and give its opinion on parliamentarians’ duty of disclosure and declaration of interest as well as random drug testing. CfJ was also invited by the Bermuda judiciary to conduct independent research and make recommendations for a suitable restorative justice programme as an alternative to traditional criminal justice.

CfJ, like other Atlantic grantees, fully capitalised on the valuable resources and learning opportunities provided by Atlantic. It was able to integrate and implement social justice theories and advocacy strategies across every aspect of its mission-centered work. Its capacity for growth proved promising in terms of the fulfillment of Atlantic’s objective to influence and strengthen Bermuda’s legislative and policy landscape.



Bermuda Community Foundation

The largest, and perhaps most enduring, of legacy grants made before Atlantic closed its doors was the investment in the Bermuda Community Foundation (BCF). Atlantic had made some strides in modelling and championing strategic philanthropy within the donor community and believed that for these ideas to thrive, a formal grantmaking structure had to be in place. However, while Bermuda remained a resource-rich community, it lacked the philanthropic architecture needed to ensure sustained strategic funding for the third sector.

Atlantic believed a community foundation would create a vehicle for a permanent charitable endowment that would forever generate and support charitable giving in Bermuda. BCF would have several important roles within the third sector. As a grantmaker, BCF would judiciously and strategically allocate grants to recipients. As a donor services provider, it would educate donors in best-practice philanthropic practices. It would also set the bar for high standards in gathering and disseminating information about community needs, challenges, and service gaps. Finally, Atlantic hoped BCF would become a neutral convener and catalyst within the community. Its neutrality and apolitical position would enable it to

Dedicated primarily to the social improvement of Bermuda

Fund manager

Overseas donor funds invested by individuals and institutions

Steward

Pools, stewards and deploys donations from a variety of donors

Grantmaker

Independent grantmaker to nonprofits addressing priority community needs

assemble stakeholders from across issues and viewpoints and to gather them for the common good.

Creating History

In 2009, Atlantic made an implementation and planning grant for groundwork through The Centre on Philanthropy, an Atlantic-funded capacity-building intermediary that served as the fiduciary agent for the grant. The grant supported a working group to conduct assessments and develop a framework for collective giving. Extensive research was conducted, which included survey and key stakeholder interviews, focus groups, and community forums hosted by community foundation experts. A concept paper was drafted by a small working committee. Data indicated the community would be supportive of a community foundation in Bermuda.

In 2011, after 18 months of research, the BCF task-force contracted with a consulting firm with expertise in community foundations, to assess the feasibility of establishing a community foundation for Bermuda. The feasibility study involved a series of one-on-one interviews with approximately 38 stakeholders. Stakeholders represented a cross-section of business leaders, high-net-worth philanthropic individuals, trust officers and other professionals and nonprofit leaders. In sum, research indicated

BCF could provide a much-needed vehicle for philanthropy that appealed to a diverse set of donors including individuals, corporate funders, and the community at large. High-net-worth individuals, a previously untapped market for strategic philanthropy, had deep roots in the community that afforded them insight into history and trends. With the assistance of BCF, these individuals could make independent decisions to support causes and or organisations of their choice while relying on BCF to conduct due diligence for their investments. BCF could also be of benefit to corporate funders because many of them did not have dedicated structures to research, execute, and monitor their philanthropic investments. Finally, BCF could provide community members and

groups a vehicle to establish funds and contribute to causes and organisations that were of importance to them.

With the commitment from Atlantic and a public mandate favouring a community foundation, Atlantic's

Programme Executive began to

put together the necessary building blocks for such a structure. A diverse taskforce led by two business leaders was formed that included stakeholders from international and local businesses, finance experts, education, philanthropy, and grassroots community-minded individuals. In keeping with Atlantic's commitment to social justice, the diversity of the group was intentional. It was hoped this would serve as a model for engaging people in foundation activity in the future. In 2012, the taskforce formalised as a steering committee.

One of the first tasks for the group was to educate potential donors and stakeholders on the definition of a community foundation. Unlike other foundations

(private or corporate), where grants were made on the basis of the founder's or employees' interests, affiliations, or the company's wish to contribute to charity generally, BCF would direct funds to issues and organisations based on community needs, evidence of impact and the expressed interests of donors. More importantly, it was imperative that people understood that BCF would work actively to ensure future resources by stewarding funds to grow a lasting endowment. BCF developed an offering of funding opportunities to donors that included:

Donor Funds — a broad range of funds designed to be responsive to donor interests.

Community Funds — permanent, unrestricted funds that were open to contributions from the public. A portion of those funds would be granted annually; the balance would go towards growing the charitable endowment for future social needs.

Field of Interest — endowed or non-endowed funds that were open to contributions from the public. Grants made from those funds went to nonprofits, groups or causes that worked in a specific field of work.

BCF Administrative/Operating Fund — provided financial support for the day-to-day programmes and operations of the community foundation.

The steering committee worked to draft a vision, mission, goals, objectives, and strategy for the Foundation. In January 2013, BCF was incorporated as a company limited by guarantee and in August became a registered charity in Bermuda. BCF was launched to the public on January 30, 2014. During the momentous occasion, donors, nonprofits and other stakeholders gathered to learn more about the new foundation and how they could contribute to and benefit from its existence.

Building from the diversity of the task force, a board was established, with representation from the

"I do not know how open those discussions are in other community foundations. We just decided to put it all out on the table, and as we looked at board applicants we frankly talked about race and gender and economic diversity very openly."

—Bermuda Community Foundation

business, education, finance, operations management, philanthropy, and investment communities. With a generous grant from Atlantic, BCF worked to raise core operating funds in the form of non-endowed and endowment gifts. In addition to Atlantic, founding investors included RenaissanceRe, Bloomberg Philanthropies, XL Foundation and a private family. These early adopters of the community foundation concept helped BCF exceed its first year fundraising projections with some \$500,000 secured for operating costs and \$1.5 million pledged towards the endowment. In addition, more than 10 funds were established by individuals and families for non-profits, causes and fields they cared most about.

BCF developed a set of priorities for strategic giving that included:

Youth Achievement and Community-Based Education — ensuring that community members, particularly youth living at or below the poverty line, have access to enriching educational and extracurricular opportunities that encourage career interests, mentoring relationships and development of leadership skills.

Arts for All and Bermuda's Heritage — advancing arts and culture initiatives by investing in organisations that provide access, enlightenment and enjoyment for people of all ages, backgrounds and abilities to artistic, cultural and historical programmes.

Caring Community Fund — supporting programmes, services and research that improve the lives of families, seniors, the disabled and other vulnerable residents (including animals) who faced immediate or longer-term threats of hunger, homelessness, isolation or unmet health and social needs.

Charitable Infrastructure and Community Development — stabilising and strengthening Bermuda's nonprofit community and neighbourhoods with personal and community development programmes, sports and recreation, community empowerment,

and planned growth initiatives. *Green and Blue Community* — increasing and maintaining open space, by encouraging green practices and healthy food initiatives, environmental education and preservation.

Early Investments and Technological Advancements

While the main focus was on building the endowment, a few initial grants were made during the inaugural year. Donor-advised grants were released to support youth and family organisations and one cultural/heritage preservation organisation. In all, 47 grants totalling more than \$400,000 were made on behalf of four funders.

Among the initial grants was a pioneering capacity-building investment to build financial knowledge and skills for nonprofits and small businesses. The rationale behind this joint initiative with HSBC Bermuda as a seed co-partner and the Bermuda Economic Development Corporation (BEDC), KPMG, Butterfield Bank, and the Bank of Bermuda Foundation (approached later to invest), was that most nonprofit organisations relied on grants and donations to fund their programme execution and operational expenses. These grants were often short-term, irregular and insufficient for the activities envisaged by the grantees. With the abundance of registered charities in Bermuda for a population of just 64,000, considerable competition existed for funding resources that resulted in community initiatives being fragmented with inadequate collaboration and consolidation. In addition, many nonprofit organisations lacked the requisite financial capacity to optimally manage the funding they received or to plan for long-term financial sustainability. Approximately 200 of the registered charitable

“On January 31, a new kind of philanthropic entity was launched. The first of its kind for the island, the Bermuda Community Foundation (BCF) is an independent grant-making organisation set up to create an enduring source of funds forever dedicated to the good of Bermuda.”

—*Bermuda Sun*, February 26, 2014

entities and small businesses were clients of HSBC Bermuda and many had financing facilities with the Bank. As such, the bank was interested in supporting these nonprofit organisations to achieve financial sustainability and enhanced effectiveness. Launched through the Bermuda College, the aim of the programme was to support small businesses and nonprofit organisations to reach financial sustainability through building diversified revenue streams, and repeat long-term funding sources. It also helped them build the financial and business management skills to ensure improved management capacity and enhanced performance.

Based on the work of former Atlantic grantee BCSP, BCF launched the first phase of a comprehensive technology platform. The first phase of GiveBermuda made its debut along with the BCF website (www.bermudacommunityfoundation.org). The GiveBermuda platform was created to bring efficiency and transparency to grantmaking. The platform:

- allowed BCF and other donors to make their grant opportunities known to nonprofits. It allowed nonprofits and donors to set up profiles, offer and search for grants, and to maintain a grant application and RFP history.
- would eventually allow for donation campaigns (sponsored by users) to be set up with proceeds going to both nonprofits and BCF funds. Visitors to the platform could also make donations directly from the site.
- would eventually become an extensive resource of information on philanthropy, community-needs data, and grantee effectiveness.

Previously, these processes were laborious and inefficient for donors and applicants. The features

offered by the BCF technology platform represented a significant move forward for the third sector.

Challenges and Opportunities

BCF was conceptualised and established during one of the most financially trying times in Bermuda's history. Therefore it proved tough to make the case for long-term strategic philanthropy in the face of dramatic need across the island. Certain aspects of BCF were initially quite successful, such as the pass-through and managed programme funds. There was also early success in the establishment of individual funds. However, initial support of the operating fund proved to be a cloud on such a bright horizon for BCF. However, this challenge also had a silver lining, or at least the prospect of a significant opportunity, for the young organisation. As member investors interacted with BCF, the hope was that they would also become more familiar and explicitly more comfortable with the organisation, its value, and thus the importance of supporting its longevity.

In all, Atlantic succeeded in realising a legacy that would continue its vision for a strong third sector where strategic philanthropy would make meaningful contributions towards a better Bermuda. Even in its infancy, BCF made meaningful advancements in the area of philanthropy. Exceeding its initial fundraising goals, the enthusiasm across the island continued to bolster the organisation as it began to make initial grants. BCF started with high expectations, and to date has surpassed them.

Lessons Learned

The story of Atlantic in Bermuda is more about contribution than attribution. When it came to return on investment and proving results in the short run, advocacy grantmaking did present its challenges. The concrete outcomes achieved by Atlantic grantees occurred within a complex system of influencing factors. However, it could credibly be said that Atlantic's pioneering strategic grantmaking in Bermuda catalysed many of the achievements outlined in this report. This work involved many setbacks and some re-evaluation of strategy, but many lessons were gleaned that could be generalisable to many jurisdictions making grants in the social advocacy field.

One early lesson was that *in order to build social policy advocacy capacity, a step back to basic organisational and leadership capacity building was necessary*. Regardless of the place, it was important that grantees had stable operations and that they fully understood and were able to implement advocacy theories and strategies. It was easy to join an organisation in its rally cry against social injustice. However, it was much more prudent to apply a deeper lens to evaluate their organisational capacity and ability to apply sound strategies to achieve their goals.

In order to achieve more rapid-capacity growth transitions, certain skills (assumed to be indigenous on the Island) had to be outsourced. These skill sets included social issue landscape research, strategy-building support, programme evaluation, and concentrated technical support. With time as a factor, as in most funding cycles, it was practical to procure the needed resources that could add value in a timely fashion. *It was imperative that these external resources needed to both execute their goals while contributing to local capacity*.

Additionally, Atlantic always strived to model the practices that they were seeking to shape in their grantees.

While a significant amount of resources were expended towards building the internal capacity of grantee organisations in many areas, *meaningful capacity building must be carefully crafted to suit the learner*. Atlantic was able to identify areas of need because it utilised evaluative methods to monitor grantee performance throughout the grant cycle. This data was invaluable in terms of understanding the needs of each grantee. It also combined traditional learning experiences with multi-method teaching strategies that included individual coaching and experiential learning.

Similarly, evidence-based practices were an important organisational competency for grantees. Survey data revealed that grantees who had not developed evaluation plans also had not: 1) identified root-cause factors in their social issues; 2) mapped the power dynamics of their social issue and/or constituency; 3) utilised multiple methods of data collection; 4) produced reports, media, or any information describing strategic actions that influenced issues; or 5) partnered with technical assistance or research organisations to support their social justice work. Evidence-based practices, such as programme evaluation and issue-research, were one of the key factors in increasing clarity and focus for many grantees. Organisations such as CURB and Centre for Justice were able to improve public data to mount powerful advocacy campaigns. As the saying goes: information is power.

Often referred to as cross-fertilisation, some of the most compelling outcomes were achieved when grantees collaborated with one another. Early in the grantmaking programme, Atlantic took deliberate

Meaningful capacity building must be carefully crafted to suit the learner

Some of the most compelling outcomes were achieved when grantees collaborated with one another

Grantmaking with long-term impact needs to have structural supports beyond the life of the grant

steps to connect grantee organisations through convenings and shared learning experiences. As capacity-building efforts gained traction, it no longer became necessary to mediate such collaboration. Grantees began to see the power of leveraging ideas and methodologies to achieve their goals.

Influencing fellow donors towards strategic philanthropy took multiple efforts over a sustained period of time. A change in the old tradition of charitable giving, like any other strongly held belief, would take a long time to accomplish. While only modest gains were made in this area, the hope was that Atlantic's grantmaking strategy provided valuable lessons for the greater donor community. Perhaps efforts to educate and influence the donor community in this area also needed direct capacity-building learning experiences, as did the grantees. In retrospect, it would have been valuable for donors to take their own type of leader study tours to see how other funders execute strategic philanthropy to affect systemic issues.

Another valuable lesson was that *strategic philanthropy must be ruthlessly purposeful and is based on achieving specified outcomes.* Atlantic invested millions of dollars in Bermuda's third sector. Many genuine and longstanding relationships were established with several well-meaning organisations that were passionate about their work but unable to capitalise on the significant resources made possible through capacity-building grants. Frankly, after ample investment of funds and resources were made over a considerable amount of time, some organisations did not fully take advantage of the learning opportunities made available to them. When internal capacity indicators lacked change/growth, hard decisions had to be made concerning the prudence of future investments. Difficult questions had to be entertained regarding

the level of social impact expected to be achieved and the likelihood of that organisation's survival without Atlantic funding. In the final wash, the list of Atlantic grantees evolved into a shorter list of high-impact organisations with greater promise to achieve their objectives.

A final lesson is that *enduring structures were needed to continue Atlantic's work.* While Atlantic could have made a number of small grants that produced immediate growth in organisations and their people, more formalised structures that supported specific fields of work and strategic philanthropy allowed the work to take root in a long-term way. In the short period the grantmaking programme in Bermuda had to accomplish its ambitious goals, it came to understand that grantmaking with long-term impact needed to have structural supports beyond the life of the grant. With this in mind, Atlantic began to make plans for more long-term structures that institutionalised the spirit of its strategic grantmaking in Bermuda. However, *it may have been more prudent to recalibrate the long-term strategy to take into account the abbreviated timeline for grantmaking.* An accelerated capacity-building effort could have proven more effective in leaving the grantees in a stronger position.

Overall, Atlantic left Bermuda's third sector stronger than when it arrived. There were significant achievements made, but still more work remained. As Atlantic approached spend-down in Bermuda, there were key investments that showed the promise of providing permanence to its work on the island. Thinking about what needed to exist in a healthy democracy and a civil society, Atlantic began to focus on certain types of organisations that needed to exist. The qualities and functionalities it envisioned included organisations that could analyse, measure and evaluate relevant social data; non-partisan,

high-impact, human-rights advocacy groups that advocated for justice; and collective funding vehicles that translated the needs of investors into the types of support that tackled a wide range of community needs. While Atlantic's final core grantees embodied these qualities, much thought was given to how the story would end and what would be the final legacy.

Atlantic's Legacy

When Atlantic ended its programme work in Bermuda in December 2013, it left two signature organisations — one that pursued access to justice through policy analysis, policy advocacy, and educating the public on human rights issues (Centre for Justice) and one that embodied strategic grantmaking and public transparency (Bermuda Community Foundation). In its last year of existence, Atlantic made strategic and rapid moves to establish and strengthen these legacies in Bermuda.

Beyond these groundbreaking efforts, Atlantic also left a strong legacy of key grantees and a small group of grantmakers with a sensitivity and awareness of structural inequities, social justice principles, and systemic thinking. The old saying, 'give a man a fish and you feed him for a day; teach a man to fish and you feed him for a lifetime' aptly described Atlantic's approach to grantmaking in Bermuda. For example, nonprofits were able to see value in creating and implementing strategies that worked to end age discrimination rather than sporadically offering senior service programmes. In an environment where social needs were growing while funding dollars were simultaneously constricting, it was no longer responsible to invest only in short-term solutions. While there would always be a genuine and legitimate need to fund direct-service

work, it must also be coupled with more deliberate systemic-level funding to stem the tide of need.

By elevating the philanthropic lens from a 'charitable' individual level to a strategic systemic level, a challenge was made to the status quo in the third sector. Early on, Atlantic truly seemed to be a lone ranger in this arena. While extensive work was done to nurture important ally relationships in the donor community, data indicated that the broader donor community had not made significant progress in the area of strategic philanthropy and/or supporting advocacy work. With a lack of funding dollars available to sustain the work of Atlantic grantees and other similar organisations, an important decision was made to leave a lasting funding structure in the form of the Bermuda Community Foundation. Through BCF, Atlantic left a legacy of sustained funding for the third sector as a whole, and new technological advancements to support this goal.

Thanks to Atlantic's vision and resources, Bermuda gained the permanent capacity to apply a critical perspective on social justice issues to any public debate. Additionally, a group of people, institutions and movements existed that could independently act to inform policy decisions and challenge unjust power dynamics. Atlantic challenged a generation of funders and policymakers to redirect their efforts to achieve more systemic and sustainable outcomes. In all, Atlantic's contribution to Bermuda was far beyond the tangible dollars invested—it extended to the very fabric of the society, with the power to improve the lives of all Bermudians. ■

The Atlantic Philanthropies Grantees 2001–2013

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
Centre on Philanthropy (Bermuda)	General Support	2001	\$290,000	Nonprofit Sector/ Voluntarism/Philanthropy
Age Concern Bermuda	PBS Caregiving Series Outreach Campaign in Bermuda	2002	\$19,000	Ageing
Oregon Public Broadcasting	PBS Caregiving Series Outreach Campaign in Bermuda	2002	\$22,000	Ageing
Windreach Bermuda	Support for WindReach Recreational Village	2002	\$50,000	Miscellaneous
Bermuda College	Planning Grant	2002	\$140,000	Higher Education
Alternative Learning Foundation and Teacher Development	The Crescent School	2002	\$67,654	Pre-Collegiate Education
National Office for Seniors and the Physically Challenged	Hurricane Fabian Relief	2003	\$75,000	Ageing
Centre on Philanthropy (Bermuda)	Ageing in Bermuda: Meeting the Needs of Seniors	2004	\$110,240	Ageing
Fordham University	Ageing in Bermuda: Meeting the Needs of Seniors	2004	\$108,000	Ageing

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
Age Concern (Bermuda)	General Operating Support	2005	\$500,000	Ageing
Open Airways	Core support	2005	\$360,000	Children & Youth
Bermuda Red Cross	US Ageing Study Tour	2005	\$30,000	Ageing
The Family Centre	Caring for Families/ Core Support	2005	\$490,000	Children & Youth
Root Cause Institute	Bermuda Non Profit Sector Capacity Building	2006	\$305,000	Children & Youth
Root Cause Institute	Bermuda Non Profit Sector Capacity Building	2006	\$195,000	Ageing
Montefiore Medical Centre	Bermuda Mental Health Training Assessment	2006	\$12,000	Ageing
Bermuda Sloop Foundation	<i>Spirit of Bermuda</i> Schooner Completion and Out-of- School Time Programme Implementation	2006	\$675,000	Children & Youth
The Donor Forum	Ageing and Youth Sector Leader Study Tour and Fellowship Fund	2006	\$125,000	Children & Youth
The Donor Forum	Ageing and Youth Sector Leader Study Tour and Fellowship Fund	2006	\$125,000	Ageing
Bermuda Broadcasting Company	Documentary Filmmaking and Public Awareness Campaign	2006	\$200,000	Children & Youth
Bermuda Broadcasting	Documentary Filmmaking and Public Awareness Campaign	2006	\$200,000	Ageing

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
Centre on Philanthropy (Bermuda)	Fiduciary Conduit for National Council on Ageing	2006	\$444,000	Ageing
YouthNet	Intergenerational Mentoring Programme	2007	\$300,000	Children & Youth
Management Assistance Group	Planning Support	2007	\$100,000	Children & Youth
Intersector Consulting	Planning support and pilot programme development	2007	\$60,000	Children & Youth
The Brotherhood/Sisterhood Bermuda	General Operating Support	2007	\$400,000	Children & Youth
The Aspen Institute	Racial Equity and Leadership Development Project	2007	\$425,000	Ageing
Columbia University School of Social Work	Study of Employment, Earnings and Educational Attainment Gaps in Bermuda	2007	\$175,000	Children & Youth
TCC Group	Organisational Capacity and Bermuda Programme Evaluation	2007	\$150,000	Strategic Learning
Age Concern (Bermuda)	Core Support	2007	\$650,000	Ageing
Aerie Foundation	The Aerie Seniors' Programme	2008	\$300,000	Ageing
Centre on Philanthropy (Bermuda)	2009 Third Sector Conference, Pre-Conference Donor Stakeholder Convening	2008	\$15,000	Bermuda: Outside Programme Areas
Academy for Educational Development	Leadership Development Planning Grant – Bermuda Costs	2008	\$5,000	Children & Youth

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
Open Airways	General Operating Support	2008	\$250,000	Ageing
Centre on Philanthropy	Bermuda Council on Ageing: National Strategy for Ageing	2008	\$66,688	Ageing
Centre on Philanthropy (Bermuda)	Cummings Vail Zuill Scholarship	2008	\$1,000,000	Outside Programme Areas
Centre on Philanthropy (Bermuda)	The Bermuda Council on Ageing	2008	\$100,000	Ageing
Root Cause Institute	Business Plan Implementation Support of Bermudian Grantees	2008	\$350,000	Ageing – Para-Transit Feasibility
Big Brothers Big Sisters of Bermuda	General Operating Support	2008	\$350,000	Children & Youth
The Family Centre	General Support and Charities House Development	2008	\$850,000	Children & Youth
Centre on Philanthropy (Bermuda)	Fiduciary Conduit for Community-Based Youth Development and Ageing Field	2008	\$300,000	Children & Youth/Ageing
Sandys 360 Foundation	Core Support: Community Engagement and Youth Develop- ment Enrichment Programmes	2009	\$360,000	Miscellaneous/Youth
Root Cause Institute	Building Social Innovator and Sector Capacity	2009	\$450,625	Building Organisational and Leadership Capacity
Coalition for Community Activism in Bermuda	Core Support and Capacity Building	2009	\$200,000	Advocacy and Social Movement Practice Capacity
Centre on Philanthropy (Bermuda)	NGO Administration and Collaboration Pilot/Core Support and intermediary development	2009	\$375,000	Building Organisational and Leadership Capacity

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
Columbia University School of Social Work	Project Support: Young Black Males in Bermuda Study	2009	\$140,000	Advocacy and Social Movement Field Capacity Building
Two Words and a Comma	Core Support: Human Rights Advocacy Campaign	2009	\$74,375	Advocacy and Social Movement Practice Capacity
Citizens Uprooting Racism in Bermuda	Core Support	2009	\$250,000	Advocacy and Social Movement Practice Capacity
Youth on the Move	Through the Cracks: Project Support for Organisational Capacity Building – Pilot	2009	\$100,000	Build Organisational and Leadership Capacity
The Chewstick Foundation	To Empower One, To Enrich All: Capacity Building, Planning and Phase I Implementation Pilot	2009	\$100,000	Build Organisational and Leadership Capacity
Age Concern (Bermuda)	Core capacity supplemental	2009	\$150,000	Build Advocacy and Social Movement Field Capacity
Tall Ships Bermuda Limited	Tall Ships Atlantic Challenge 2009: Trainee Sponsorship and Youth Development	2009	\$250,000	Bermuda – Miscellaneous
YouthNet	Core Support	2010	\$315,000 (3 years)	Bermuda
The Centre on Philanthropy (Bermuda)	Consolidated Bermuda Programme	2010	\$94,250	Initiatives – Re-grant fee
Youth on the Move	Demonstration Support	2010	\$165,000 (2 years)	Strategic Initiatives – Build Organisational and Leadership Capacity
Brotherhood Sisterhood	Demonstration Support	2010	\$260,000 (2 years)	Strategic Initiatives – Build Organisational and Leadership Capacity

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
The Chewstick Foundation	Demonstration Support	2010	\$250,000 (2 years)	Strategic Initiatives – Build Organisational and Leadership Capacity
Centre for Justice	Demonstration Support	2010	\$355,750 (2 years)	Strategic Initiatives – Build Organisational and Leadership Capacity
Root Cause	Capacity Building/Technical Support	2010	\$210,000 (2 years)	Strategic Initiatives
Aspen Institute Roundtable	Capacity Building/Technical Support	2010	\$250,979 (2 years)	Strategic Initiatives on Community Change
Civil Society Analysis and Sector Mapping	Capacity Building	2010	\$200,000 (2 years)	Strategic Initiatives
Non-Profit Leader Study Tours	Capacity Building	2010	\$99,021 (2 years)	Strategic Initiatives – Build Organisational and Leadership Capacity
The Aspen Institute	Race Equality Initiative	2011	\$175,000	Strategic Initiatives
The Chewstick Foundation	Spoken Word Platforms for disenfranchised people	2011	\$85,000	Strategic Initiatives – Build Organisational and Leadership Capacity
Gender Equity (Creative Force)	Exploratory – film clips	2011	\$60,000	Strategic Initiatives
Root Cause	Nonprofit Capacity Building – Technical Support	2011	\$110,000	Strategic Initiatives
Centre on Philanthropy (Bermuda)	Fiduciary Conduit Pilot fee	2011	\$100,000	Bermuda
Bermuda Community Foundation Feasibility	Feasibility Work	2011	\$125,000	Strategic Initiatives

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
The Aerie Foundation	Core Support/Demonstration	2011	\$80,000	Organisational and Leadership Capacity Building
Age Concern Bermuda	275,000	2011	\$550,000	Advocacy and Social Movement Field Capacity Building
Big Brothers Big Sisters	80,000	2011	\$80,000	Bermuda
Youth on the Move	Core Support/Demonstration	2011	\$510,000 (3 years)	Organisational and Leadership Capacity
Women's Resource Centre	Core Support/Demonstration	2011	\$125,000	Advocacy and Social Movement Practice Capacity
Citizens Uprooting Racism in Bermuda	Advocating for Racial Justice	2012	\$300,000	Advocacy and Social Movement Practice Capacity Building
The Chewstick Foundation	Engaging Disconnected Youth & Breaking Down Social Barriers Through Creative Expression	2012	\$430,000	Organisational and Leadership Capacity Building
The Aspen Institute	Aspen-Bermuda Partnership on Racial Equity: Tackling Structural Racism	2012	\$200,000	Advocacy and Social Movement Field Capacity Building (Legacy)
The Family Centre/ Youth Development Zone	Anchoring Youth and Family Services as a Community Responsibility	2012	\$350,000 (2 years)	Advocacy and Social Movement Field Capacity Building (Legacy)
Women's Resource Centre of Bermuda	Advancing an Agenda for Women's Equality	2012	\$100,000	Advocacy and Social Movement Practice Capacity Building (Legacy)
The Centre on Philanthropy (Bermuda)	Nonprofit Sector Capacity Building (Grant and fiduciary conduit fees)	2012	\$75,000 (\$17,250)	Organisational and Leadership Capacity Building

Grantee	Type of Support	Year	Amount	Programme Area / Strategy
Bermuda Civil Society Project	Civil Society Review Taskforce	2012	\$190,000	Advocacy and Social Movement Field Capacity Building (Legacy)
Financial Sustainability Project	Co-investment for nonprofit leadership and management training	2012	\$137,500	Organisational and Leadership Capacity Building (Legacy)
Bermuda Community Foundation	Bermuda Community Foundation Start-up	2012	\$ 498,576	Sustainable Philanthropy – Establish a community foundation
The Centre on Philanthropy (Bermuda)	Nonprofit Sector Capacity Building	2013	\$ 50,000	Organisational & Leadership Capacity Building
Centre for Justice	Access to Justice	2013	\$650,000 (3 years)	Strengthen Key NGOs
Age Concern (Bermuda)	Anchoring the Agenda for Positive Ageing	2013	\$725,000	Strengthen Key NGOs
Bermuda Community Foundation	Support for the Bermuda Community Foundation	2013	\$6,000,000	Sustainable Philanthropy – Create a community foundation to support nonprofit sector

Bermuda Programme Staff and Strategic Advisors

Myra Virgil, PhD, Programme Executive / Head of Grantmaking

Sheila Thompson, Programme Support

Jackie Williams-Kaye, Strategic Learning and Evaluation Executive

Tamara Gathright Fritz, Founder and President, Strategic Evaluation Consulting

Anand Dholakia, Senior Consultant, Root Cause

Sarah Cooke, Head of the Bermuda Office, **Rahsaan Harris**, PhD, Programme Executive (New York) and members of The Atlantic Philanthropies Programme Teams, globally

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