



BERMUDA COMMUNITY
FOUNDATION

BCF DONOR PRODUCTS AND SERVICES

	PRODUCTS AND SERVICES ¹	Endowed ²		Non-Endowed
		Donor-Directed (>\$1m)	Donor-Directed (<\$1m)	Programme
Available to Public	Vital Signs® Summary reporting	Y	Y	Y
	Data Services (self-guided reporting functionality)	Y	Y	Y
	Grantee status listings and search capabilities	Y	Y	Y
	Nonprofit sector classification	Y	Y	Y
	Self-generated nonprofit profile reports	Y	Y	Y
	Grant application tools and resources	Y	Y	Y
	US Taxpayer / Giving Facility	Y	Y	Y
	Online Fiscal Sponsorship / Giving Facility	Y	Y	Y
Basic	Online access to Fund Account ³ / Statements	Y	Y	Y
	Fund Activity Reporting	Y	Y	Y
	Quarterly Fund Statement	Y	Y	Y
	Electronic grant submission capability	Y	Y	Y
	Directed-giving online, multi-person account access	Y	Y	Y
	Website Profile on www.bcf.bm	Y	Y	No
	Access to professional investment management services	Y	Y	No
	Fund-holder information and networking receptions	Y	Y	No
	Gift receipt / grant disbursement	Y	Limited	Fee per transaction
Pro	Grant Service Administration	Y	Fee-based	Fee-based
	Customised grant application form	Y	Fee-based	Fee-based
	Targeted grant application process	Y	Fee-based	Fee-based
	Main point of service to applicants	Y	Fee-based	Fee-based
	Grant application collating and coversheet	Y	Fee-based	Fee-based
	Grant application verification and vetting	Y	Fee-based	Fee-based
Premium I*	Donor Portfolio Map	Fee-based	Fee-based	Fee-based
	BCF Grey Notes	Fee-based	Fee-based	Fee-based
Premium II*	Vital Signs® Mini Reports	Fee-based	Fee-based	Fee-based
	Vital Signs® Primer	Fee-based	Fee-based	Fee-based
	Vital Signs® Convening Event	Fee-based	Fee-based	Fee-based
	Vital Signs® Summary Report	Fee-based	Fee-based	Fee-based
Premium III*	Donor Portfolio Analysis (full)	Fee-based	Fee-based	Fee-based
	Social Impact Score Card (outsourced)	Fee-based	Fee-based	Fee-based
	Commissioned Evaluation (outsourced)	Fee-based	Fee-based	Fee-based

¹ All fee-based services are partially subsidised but priced to cover core costs of product and development.

² Gifts can be pledged over multiple years.

³ All funds are professionally managed; disbursements are at the direction of the settlor.

*In addition to recognition benefits, contributors to Operating, Central or Field-of-Interest Funds gain access to Pro and Premium benefits at a customised fee rate. Fees may vary based on total annual grantmaking range, asset size and investment relationship to BCF.

Premium Donor Strategy Products Descriptions

PREMIUM¹

Donor Portfolio Map By mapping your giving patterns against a standardized classification scheme*, we can help you determine where you have made your deepest social investments. Mapping tables can be used as one element of a strategic planning process or as an at-a-glance resource for giving committees.

*Classification Schemes / Taxonomy Options

Basic	Registered Charity/ Charitable Purpose / Accreditation and/or Certification
Option 1	NTEE Mission Classification Taxonomy (Core Competency) NEC Programme Classification (Focus Area or Programme Type)
Option 2	Target Population / Participant and Impact Level (3 values in each) Service Type and Human Service Continuum (if applicable)
Option 3	Vital Signs® and Sustainable Development Goals

Grey Notes

These supplements offer valuable information¹ on a local social issue, i.e.:

- *Samples of standardised indicators*
- *Samples of programmes operating in the subsector*
- *Challenges, questions and gap areas arising from the Vital Signs® review*

This one-page product is not intended to create a new evidence base² but rather to identify, collate and synthesise existing information in meaningful way.

PREMIUM II — VITAL SIGNS® PRODUCTS

Vital Signs® Mini A performance area report that includes deeper factual data drawn from the updated 2017 research. This report enhances the free public summary with details on methodology, survey results and the research that informs it.

Vital Signs® Convening Participant Primer A partial, relevant drill down of the Vital Signs® priority area, outcomes the Vital Signs® area could include and indicator data specific to the Vital Signs®. The primer guides discussion for key decision makers on improving outcomes in areas important to the community.

Vital Signs® Convening Event BCF researches standardised outcomes and indicators related to a priority area and facilitates a prioritisation session with a selection of field experts, nonprofits and issue ambassadors. Convenings can be used to set an agenda for organisational and potentially system/countrywide impact by establishing a core set of results and benchmarks to which resources can be aligned

Vital Signs® Convening Summary Report A listing of the prioritised outcomes and indicators specific to a Vital Signs® performance area, and a summary of any input from experts and people with lived experience on what is needed to achieve each outcomes and what resources/efforts will be required, i.e., implications funding, Government policy or re-tooling, current nonprofit programmatic work and/or re-alignment.

*** Pricing and availability of this work is subject to the scope of the donors' funding interest and relationship to BCF

1 These field scans incorporate "grey literature" research that is not disseminated in traditional academic outlets, such as peer-review journals. Examples of grey literature may include government reports, program evaluation reports, and unpublished dissertations. Grey literature is an important source of information. Though not scholarly, it is produced by researchers and practitioners in the field. It can often be produced more quickly, have greater flexibility, and be more detailed than other types of literature.

2 Content for these reports is limited to available local data. BCF cannot guarantee report quality due to data limitations.

Systems onboarding, quality check and data refinement & Donor Report	Customised pre/post nonprofit programme impact reporting based on a donor's grants portfolio. This programme fidelity assessment can be used as a screening process to make decisions (nonprofits report on intended outcomes) or an evaluation tool (reported outcomes). BCF has negotiated regional exclusivity with an overseas vendor to use this portfolio analysis system.
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The donor portfolio analysis has several components:

Outcome Summary

- The universal programme outcome grantees need to satisfy
- A definition of the universal outcome
- The aligned grantees (local data used but may be limited as the Bermuda data-base is built out)

Impact Snapshot

- How many grants were analysed
- How many of the target group are reached
- How many of the target group achieved the primary outcome for which the donor funded
- Total number of grants made by donor, average amount, average budget of grantees, other

Detailed portfolio summary indicating

- Average efficacy rates of the funded programmes
- Average cost per funded outcome
- Total reach per outcome; efficacy rate
- Other portfolio details of interest

Stage 1: Invitation and Onboarding to Reporting System

Prospective grantees are invited to complete a pre-grant social impact survey based on the donors' funding interest. The survey is part of BCF's reporting system. Nonprofits complete an online survey that is used to prepare for the donor an aggregate report of their grant portfolio, while significantly reducing the ultimate reporting burden on prospective or current grantees. This stage involves:

- 1 Invitation to System. one-year subscription to the customised Social Impact Reporting platform
- 2 Support to nonprofits and grantees when filling out the survey in the form of access to robust FAQs, online help and email support.

Stage 2: Portfolio Analysis — Annual or Periodic Grant Performance Reporting

Prospective grantees and funded entities enter or update the survey in advance of a reporting date determined by BCF, on behalf of the donor. BCF orders the report, reviews it and assess quality. BCF may arrange private consultations with nonprofits to discuss their survey return with a view to data refinement. The donor is provided with a customised PDF report summarising portfolio performance, including grant allocation by outcome, total outcomes funded and performance benchmarks, followed by a section on the overall intended impact of the donor's grant portfolio by outcome, including a breakdown of impact by grantee and benchmark data. The portfolio analysis takes three weeks to deliver, dependent on programme survey completion.

Donor Portfolio Analysis Pricing

There are two costs associated with this product, the initial per programme subscription which allows a nonprofit access to the platform and survey form, and the cost of generating a portfolio report. Estimates will be provided to you based on your funding portfolio size.

PREMIUM III — PROGRAMME IMPACT ASSESSMENT

Social Impact Score Card (SIS) *The Social Impact Score card (SIS) helps you evaluate local programmes leveraging our partner's partner's evidence base. It offers a more comprehensive assessment of a social programme in which you have a specific interest, either as a current or prospective grantee. This assessment offers a comparative of the selected programme's primary features (i.e., its activities, beneficiaries and context).*

The SIS programme assessment provides:

- Standardised outcome metrics: measure programme effectiveness and efficiency (i.e., cost per outcome to funder)
- Benchmark data: compare performance to peer organisations
- Evidence assessment: review of the quality and reliability of self-reported impact data
- Programme design insights: analyse the programme's design for drivers of success, and the opportunities to increase its impact
- Relevant evaluations: review studies from the vendor's evidence base that are most informative for this programme
- One-page executive summary offers a digestible snapshot of the programme and its impact.

Social Impact ScoreCard Benefits:

- 1 Access to rich, evidence-based insights pulled from the BCF vendor's broad database of published and unpublished evaluations and reviews of similar programmes
- 2 Low burden, rapid learning. Programmes take a one-hour survey and participate in two one-hour phone reviews. The SIS report takes four weeks from date of request to complete.
- 3 BCF's contracted vendor conducts independent data verification and impact auditing by a team of measurement experts. The process enhances grant application reviews and illuminates areas for capacity building support
- 4 A cost-effective evaluation solution versus single-sourced or multi-year evaluations that can cost \$100k+
- 5 Report of key data points provided in PDF

The per-programme cost of a Social Impact Score Card is approximately \$5,500–\$6,500.

PREMIUM III – STRATEGY AND EVALUATION

Strategic Evaluation *Do you need help articulating your grant-making strategy? Are your grant investments making an impact? A transformative evaluation that gives both grant makers and nonprofits the knowledge and the tools to improve their effectiveness and make a greater impact. If you would like help developing and clarifying a cohesive grant-making strategy and evaluation plan, and then to execute a thorough analysis of your outcomes, this service can be arranged.*

Commissioned evaluations costs are comprised of a consultant fee plus BCF facilitation and project management fee. The total cost ranges from \$10,000 to \$100,000.

Our select vendors can also design and deliver practical workshops for your grantees that will build their capacity to measure the outcomes of your funded programmes.

*** Premium III products can be accessed by fund contributors as a package or separately at rates quoted upon request