Report for Center Review of
The Buckman Fellowship for Leadership in Philanthropy

Center Analysis and Performance

Mission

The Buckman Fellowship for Leadership in Philanthropy is a year-long program whereby participants gain leadership training in numerous aspects of philanthropy. This is accomplished through monthly seminars and application of learning to a project.

Important goals

- To provide a learning experience and training for Buckman participants in both leadership and philanthropy.
- To extend the program outcomes through alumni.
- To make public the concept of philanthropy and leadership through a lecture or other means.

Center’s relationship with the College

- Numerous faculty, staff, students, and alumni of the College have been Buckman Fellows and have participated in the program.
- The College of Design has provided management of the program including website maintenance, publicity of its programs, and space for programs.

Personnel

- Personnel – the program is administered with one 25% time graduate assistantship and weekly meetings with the Associate Dean for Research & Outreach.
- An Advisory Council is made up of volunteers representing three Colleges, former Buckman Fellows, the nonprofit world and the community. They meet twice a year to advise about the program recruit applicants and select Buckman Fellows.

Organizational Chart

- The Buckman Program is administrated through a graduate assistant and supervised by the Associate Dean.

Summary of last 5 year’s activities and accomplishments
Background

The Buckman Fellowship for Leadership in Philanthropy is in its seventh year of operations. The Fellowship is made possible through an endowment from former University of Minnesota faculty member, Mertie S. Buckman, who demonstrated an interest in philanthropy. The Fellowship is available to faculty, staff, graduate students, and alumni from the four departments of the former College of Human Ecology, which now represent three colleges: College of Education and Human Development, College of Design, and College of Food, Agricultural & Natural Resources Sciences. Through the Buckman Fellowship participants gain leadership training in numerous aspects of philanthropy and an experience of applying this training to a specific project.

Structure

Guidance for the direction of the Buckman Fellowship is provided by the Associate Dean of the College of Design, Marilyn DeLong and the Buckman Fellowship Advisory board. Program management and daily implementation of the program are delivered by a graduate student awarded a 25% Research Assistant position. Currently the program is administered by Jane Newell, a doctoral student in Family Social Science. This is Jane’s third, and final, year (2007-08, 2008-09, and 2009-10) in consecutively managing the program.

Advisory Board

Each year since its inception, the Buckman Fellowship has been guided by an advisory board consisting of representatives from each of the four departments, community experts in philanthropy, as well as the addition of Buckman Fellowship alumni over the years. Linda Mona and Marilyn DeLong have served consecutively from the first advisory board to the current board. Today Linda Mona, President of Creative Environments, serves as the board chair. (See Appendix A)

Buckman Fellows

The Buckman Fellowship for Leadership in Philanthropy provides a unique opportunity for innovative, creative, and motivated faculty, staff, graduate students, and alumni to gain the leadership and philanthropic skills to implement projects of their own design and powered by their own passion. The structure of the program is designed to provide education and networking opportunities in pertinent areas of philanthropic leadership thereby encouraging and supporting the fulfillment of their own philanthropic projects.

The intention of the fellowship has been to provide an academic-year-long program in training in philanthropy to not more than 10 individuals. Over the seven
years of the program, fifty individuals have participated in the fellowship, with an average of seven fellows per cohort. The smallest cohort was held in 2005-06, with five fellows. The largest cohorts are found in 2006-07 and this year, 2009-10, with nine fellows each year. See Appendix B for summary of the last seven fellowship cohorts (2003-2004 to 2009-2010).

For list of current Buckman Fellows (see Appendix C).

Applications are solicited and reviewed each year in the spring for the following year. See attached application form (Appendix D). Announcements of the Fellowship are made through newsletters, electronic announcements, college members, word of mouth, and faculty.

Program description

Seminars and Alumni gatherings

For the first four years of the fellowship the program was focused around the seminar series for fellows and the development and delivery of their philanthropic projects. An annual Buckman Fellowship Alumni gathering was offered for the purpose of fostering connections among cohort groups and encouraging new applications for the following cohort year.

Public Lectures

In year five (2007-08) of the Buckman Fellowship, the program expanded to include a public lecture sponsored by the Buckman Fellowship for Leadership in Philanthropy. Rip Rapson, President, Kresge Foundation, nationally known in the Twin Cities and beyond for his philanthropic leadership, delivered the keynote address. The public lecture was combined with the alumni reunion and a demonstration of philanthropy (the donation of two Ralph Rapson chairs to the Goldstein Museum). The structure of this event allowed for expansion of the audience for the Buckman Fellowship to now include faculty, staff, and students at the University of Minnesota interested in philanthropy, the non-profit and community philanthropic communities. This afforded a networking opportunity for our Buckman Fellows as well as the opportunity to inform and educate the non-profit and philanthropic community about the Buckman Fellowship.

Year six (2008-09) of the Buckman Fellowship (2008-09) the program sponsored a panel of local philanthropic leaders: Peter Hutchinson, Bush Foundation, Jon Pratt, Minnesota Council of Nonprofits, and Carleen Rhodes, The Saint Paul Foundation & The Minnesota Community Foundation, to address issues related to changes in the distribution of funding from local foundations. We once again offered the Demonstration
of Philanthropy presentation featuring Adine Stokes, current director of the Wayne Caron Family Caregiving Center (Dr. Wayne Caron was in the first cohort of Buckman Fellows) on her Buckman Fellowship project to fund the ongoing work of the center. A networking opportunity was provided as the Buckman Fellowship Alumni reunion was again included in the structure of the evening.

This year’s Buckman lecture opportunity is a workshop conducted by David Stillman (to be described later in this document).

Evaluation of activities

The primary form of evaluation for the Buckman Fellows over the years has taken three forms:

1) Seminar evaluation. The evaluation of monthly seminars conducted at each session is designed to assess the value of the seminar presenter’s material for relevance to the fellow’s needs.

2) Final evaluation. The final end of year evaluation assessed for the overall value of the fellowship for the advancement of each fellow’s philanthropic plan. The seminar and end of year evaluations have remained basically the same, with slight variations in wording.

3) A third form of evaluation is for the purpose of selecting applicants. Assessing goodness of fit for incoming fellows from applications received each year is an important function of the advisory board. The assessment form and the application form need to be aligned in terms of criteria. See attachment for forms of evaluation used for evaluation by participants or advisory board members associated with the program (See Appendix E).

4) This year we provided the fellows with a self-assessment to be completed at the beginning of their year-long fellowship, referred to at mid-year check-in, and completed once again at the end of their fellowship year to determine their growth and development. (See Appendix F)

5) Program evaluation has been conducted this year by email distribution of a brief survey. Questionnaires were sent to current and former Buckman Fellows, current and former advisory board members, deans and department heads. See attachment for results of current brief questionnaire of the Buckman Fellowship program (See Appendix G).

Directions for the future

Administration
This year we are addressing important questions to determine the effectiveness of the program. Are we fulfilling the intentions of the Buckman program and budgeting restrictions? Who is our audience? What would be the most effective structure of the administrator position? Should it continue as a graduate assistantship? If so, how to encourage future graduate assistants to contribute to the stability of the program? What does a graduate assistant gain from administering such a program? Should we look to other ways to administer the program? Possibly a non-student administrator?

The administrator position for the Buckman Fellowship has historically been a 25% graduate assistantship. The current administrator has been in the position since the fall 2007, now in her third, and final year, of administrating the program. This longevity has provided on-going stability and program development over time. Historically, there had been significant turnover in this position due to the nature of typical graduate student education where graduate students frequently rotate assistantships throughout their education. It may be reasonable to consider hiring for a part-time, permanent administrative staff or faculty position, in order to continue the progressive development of this program. The nature of the fellowship requires a consistent, reliable, engaged administrator who can continue to work with the Associate Dean to deliver and expand on the goals of the Buckman Fellowship for Leadership in Philanthropy at the University of Minnesota.

Program

Historically, newly selected Buckman Fellows have been awarded $1,000 to support their professional leadership development or to implement their project. With new federal regulations, and the implementation of the Enterprise Financial System (EFS), distribution of this stipend to fellows will be a significant challenge in the future. Possible alternative actions may include offering the $1,000 as compensation for time to participate in the leadership training program, or designate funds for leadership training only.

Beyond the question of the financial award, is the question of the format for delivering the program, including how to ensure sustainability over time. Could the program be offered every other year? Offered in an intensive summer or J-term or some other configuration yet to be determined?

Pending, planned, or potential projects (short and long term)

Accomplishments

Current Fellows’ Projects
The 2009 – 2010 Buckman Fellowship cohort consists of nine fellows with a broad range of interests, experience, and project and leadership goals for this year’s fellowship (see appendices C for list of fellows and their projects). A few significant outcomes of note for this year’s cohort are as follows:

1) Paul Snyder, Program Director, Konopka Institute: Paul was facing the eminent closing of the Konopka Institute due to lack of funding to continue the work of the center, including his position. Through his participation while in the Buckman Fellowship, Paul worked with information obtained during one of our workshops offered by Jan Sickbert, of the U of M Foundation, to intentionally and skillfully frame the unique contribution of the center to a key potential funding source. As a result of Paul’s work, the Konopka Center received a major grant award from the U.S. Department of Education’s Institute of Education Sciences.

2) Dewey Thorbeck, Director, Center for Rural Design and Stephen Streng, RA, Center for Rural Design, had as their goal when they entered the Buckman Fellowship to launch an international consortium on rural design. On January 15 -16, 2010, Dewey and Stephen held the first International Symposium on Rural Design. Significant feedback from the attendees of this symposium indicted that the U of M Center for Rural Design is seen as a leader in the world in this area (see Appendix H).

Program development and expansion

The Buckman program is 7 years old and has provided a yearly cohort group of 7-10 Fellows with leadership training in philanthropy. Alumni have reached 50 in number over the past 7 years.

Annual lecture and public offering

This year we have expanded upon our format, and are modeling our commitment to philanthropy, by partnering with the University of Minnesota Development Foundation, to bring David Stillman from Bridgeworks for our annual lecture event. We wanted to make this year’s event a tangible hands-on offering that would bring value to the university community, as well as our current and former Buckman Fellows, and the philanthropic community. With that intention in mind, we created a partnership with the Foundation, to hire David Stillman to deliver a workshop focusing on the variations inherent within and between the four generations Stillman addresses in his lectures and workshops: Traditionalists, Baby Boomers, GenXers, and Millennials. The themes associated with each of these generations are addressed in *When Generations Collide*, a book David co-authored with Lynne C. Lancaster. The workshop is scheduled for April 19, 3 – 5 pm, in Rapson Hall. The workshop will be followed by a public option to engage in dialogue with the authors. David and staff will be on site to discuss their newly released (April 9, 2010) book, *The Millennials*.
Challenges

A key challenge is to provide continuous administration through a 25% graduate assistantship with the supervision of the Associate Dean. Another challenge is to publicize the program appropriately so that we get a competitive pool of applicants each year. The program has been evolving over the past 7 years with ebb and flow of experience and knowledge based upon the interactions of the Fellows, the Advisory Council, and the thoughtful reflections of the staff.

Other issues and involvements of staff

The current administrator, Jane Newell, will be leaving the Buckman Fellowship administrator position at the end of the spring 2010 semester. Jane is on track to focus on her preliminary written exams this semester and next, with the intention of obtaining a research assistantship in the area of participatory action research working with a professor in her department, Family Social Science. Jane wishes to express her appreciation for the opportunity to work with Marilyn DeLong and the College of Design faculty and staff, as well as the Buckman Fellowship Advisory Board, in the daily operations and implementation of the Buckman Fellowship for Leadership in Philanthropy. This assistantship, while not directly related to her major in Family Social Science, has given her the opportunity to engage powerfully with others who have a passion for making a difference in the world, a value she holds central to her personal and professional endeavors. In this capacity, Jane was given the opportunity to grasp the many aspects of managing an educational program within the university, to develop a syllabus and program offerings relevant for adult learners seeking personal and professional skill enhancement, to manage all aspects of a year-long fellowship including the planning and delivery of an annual lecture and end of year graduation event for fellows. Additionally this year, anticipating the end of the assistantship and having a commitment to see the program continue to expand and flourish, Jane worked with Associate Dean, Marilyn DeLong, to conduct program evaluation with sustainability in mind. This evaluation has contributed to the visioning for this program looking to the next five years.

Publications, presentations, and conferences attended

Professional development

A yearly professional development event for Buckman Fellows is to attend the Minnesota Council of Non Profits annual conference. Associate Dean, Marilyn DeLong, and Administrator, Jane Newell, attended the annual Minnesota Council of Non Profit conference. Eight of nine fellows attended the conference on October 5 & 6, 2009.
All fellows have an award of $1,000 to use toward the implementation of their project and/or to support professional and leadership development. This year one fellow, Denise Hauge, used her award to fund additional leadership training through MCN, and Paul Snyder used his award to fund his philanthropic leadership development by attending a week long intensive training at the Fund Raising School housed in the Center on Philanthropy at Indiana University/Purdue University.

Program evaluation

Dr. DeLong and Jane Newell discussed best options for program evaluation for the program. A brief questionnaire was sent out to various audiences of the Buckman Fellowship for their perspectives on the perceived value of the program. Questionnaires were sent to current and former fellows, current and former advisory board members, as well as deans in the colleges of CEHD, CDes, and CFANS and department heads for FSoS, SSW, DHA, and FSN. (see Appendix G for executive summary).

Dr. DeLong and Jane Newell will write a paper capturing their learning and key insights from their joint work on the Buckman Fellowship, highlighting findings from the brief questionnaire responses gathered this fellowship year (2009 – 10).

Budget including funding streams

Funding Source: The Mertie Buckman Endowment Fund

Income and expenses for current year and next year projected

Summary Budget including revenue and expenses (see Appendix I)

Future of the Center (five year horizon)

The major goal of this year’s evaluation process is to determine the effectiveness of the Buckman Fellowship for Leadership in Philanthropy, its fit within the university setting, and how to accomplish sustainability of this program over time. In the following list we begin to brainstorm a range of possible options for sustainability of the program.

- Collaborations with the Hill Fellowship, through the Humphrey Institute (see Appendix J).
- Development of philanthropic courses available to students
- Future research to determine fit of continuing within existing advanced philanthropic programs for graduating Buckman Fellows
- Expansion of current administrative accountabilities to include research into philanthropy
- Hiring of a part time faculty administrator (rather than a graduate student), thereby providing consistency and sustainability over time, allowing for
continued evaluation and development of this unique philanthropic focused program

- Collaborative and cooperative ventures with other U of M programs with philanthropy as a core value

Concerns & Challenges

- Position of Associate Dean for next year is reduced, and continued supervision within this position is in question
- Graduate student administrator will be new as well as supervisor—need to assess what is critical to maintain in the Buckman Fellowship program and other models for the program to flourish.
- Value to the College and program within former College of Human Ecology format needs discussion
- Program scope may need clarification and expansion. For example should more be made of the alumni cohort and their activities? Should we continue a public lecture? Should the seminar offering be more concentrated? (Presently the seminar meets one time per month on Fridays).
- Endowment is finite and limitations for the program need to be considered year by year.
- Payment to student fellows is becoming more complicated.