



Livingston Fellowship Program Assessment: Executive Summary



March 2015

Objectives and Methods

With this, the 10th anniversary of the Livingston Fellowship Program, 50 Fellows now constitute a vibrant network of leaders poised to make measurable differences in the nonprofit sector and beyond. As the Bonfils-Stanton Foundation celebrates this milestone, it wishes to step back and assess the Program to determine if it is achieving its objectives, if it is attracting the best of Colorado's future leaders, and if it is providing the right level of support for its emerging network.

The Bonfils-Stanton Foundation asked Changing Our World, Inc. to conduct an assessment of the Program's achievements and challenges, and to make recommendations about ways in which the Foundation could ensure the second decade of the Program is as strong as the first.

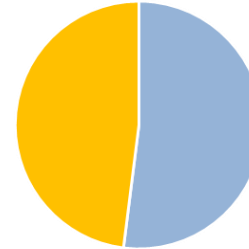
In pursuing this work, Changing Our World:

- Reviewed all documents and developed a database on the first decade of applicants, Fellows and their programs, to understand the backgrounds and characteristics of Fellows and the ways in which they had strengthened their leadership skills
- Interviewed Board and staff members, Fellows, non-selected Fellowship applicants, Selection Committee members, and community leaders about their views and experiences
- Interviewed peer foundations with nonprofit leadership fellow and sabbatical programs to understand the approaches, and challenges, of analogous programs
- Defined dimensions of impact, and reviewed all Fellowship final reports for identification of impact cases
- Identified a series of areas for growth and improvement and recommended specific actions to create an even stronger second decade

Who are the Livingston Fellows?

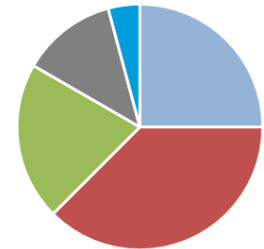
The 50 Fellows are evenly divided in terms of gender, and most have advanced degrees.

Gender Distribution



Male Female

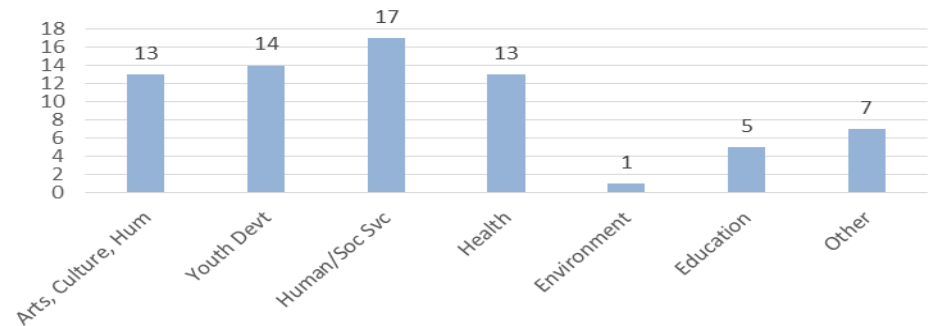
Most Recent Degree



BA/BS MA/MPA JD/MBA Doctoral Other

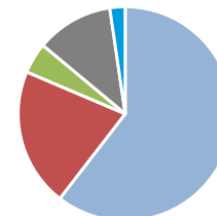
They represent a diversity of nonprofit sectors, with youth development and human services being the most frequent backgrounds.

Fellow Sectors



They are relatively new to their executive-level jobs.

Years Exec. Leadership Role Was Held



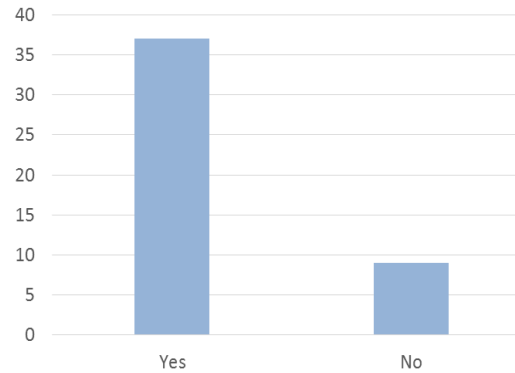
5 years and under 6-10 years
11-15 years 16-20 years

Who are the Livingston Fellows? (cont'd)

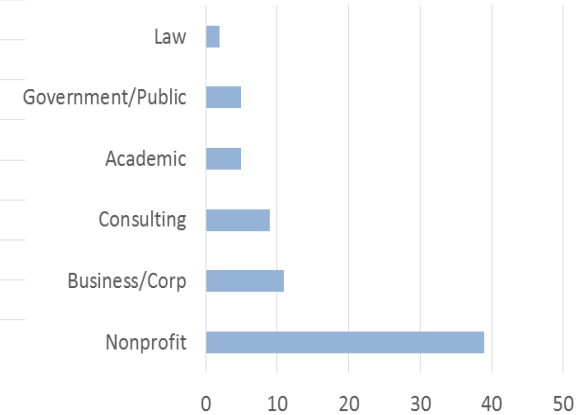
They are committed to the nonprofit sector both in terms of their backgrounds and in terms of their personal time.

Of the 45 Fellows from the 2005-2013 period, a third have changed organizations since their Fellowship. Most stay in the nonprofit or public sector, extending the leadership skills learned from the Program widely in the public service sector.

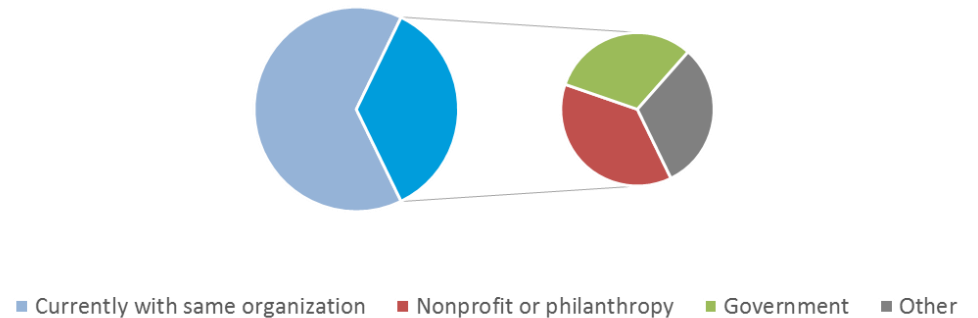
Served on Nonprofit Boards



Nature of Past Three Organizations



36% of Fellows ('05-'13) are now in new organizations



Strengths and Challenges: Goals

Strengths

- The goal of the Fellowship Program is well articulated in the 2004 founding proclamation:
“To support and enhance the development of talented and promising individuals who have the ability to excel at the highest levels of nonprofit leadership and serve their communities in the spirit of Johnston R. Livingston.”
- The goal links individuals, their nonprofit leadership and the communities they serve. This is a great strength of the Program.

Challenges

- It is also a challenge in that many of those interviewed put the emphasis of the goal on one or the other of the three intended elements, but not necessarily on the intersection. It is also a challenge in determining how to measure success holistically without losing sight of the Fellowship method, which enables individuals to pursue capacity building for their individual strengths.
- While the proclamation does not specify any particular characteristics of Fellows apart from their talent and promise, interviews did encourage the Foundation to purposefully pursue diversity of Fellows in all aspects, both in terms of individual characteristics and backgrounds and in terms of geographic distribution throughout Colorado.

Strengths and Challenges: Process

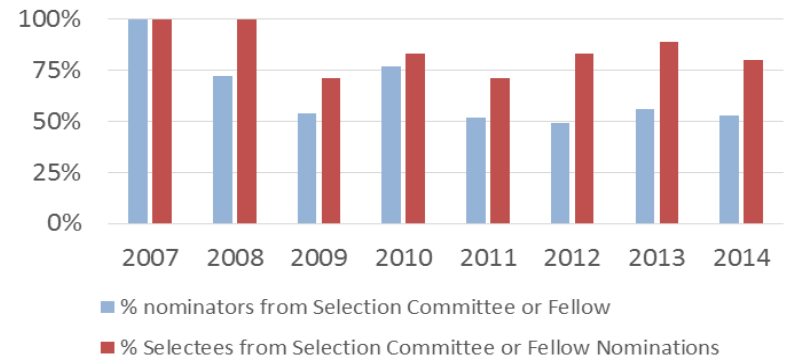
Strengths

- The Foundation has attempted to cast a wide net for nominations for the Fellowship award. Indeed, between 35 and 40 individuals submit nominations. An extensive vetting process is used to ensure that the nominees are of high quality, and a panel system has been used to narrow these nominees to a smaller group for further in-person interviews and selection.
- The Foundation has engaged a nationally recognized leadership mentor and trainer as a consultant in the selection process.

Challenges

- The nominations process has lacked a unified requirement for background information on nominees, and the selections process has often lacked an “apples to apples” capacity to compare the backgrounds and achievements of nominees
- Despite the broad net cast for nominations, the bulk of nominations have come from those closest to the Program and to the Foundation. Moreover, there has been an overlap between those nominating and those selecting candidates for further vetting, perhaps unbalancing the process. While there is no indication that quality has suffered, it remains the case that an objective and transparent process is optimal.

Fellow Selection

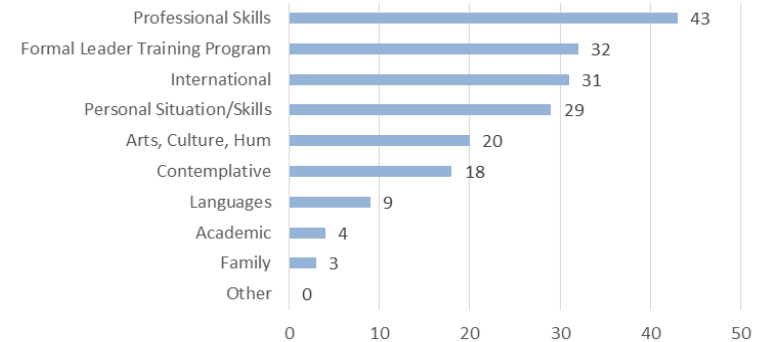


Strengths and Challenges: Program Content

Strengths

- Fellows are encouraged to stretch and grow through the Program. There is no prescribed program, and Fellows use the resources in a wide variety of ways. The Foundation works with Fellows to develop plans and must approve program plans, but the design and selection of initiatives is the responsibility of the Fellow. Most include formal training and professional skill development, but the range of other activities is wide.
- It is noteworthy that many non-arts sector Fellows include the arts in their plans indicating that the intersection between the arts focus of the Foundation and sectorial inclusiveness of the Fellowship may be complementary not in conflict.

Areas of Plan Focus



Challenges

- The Foundation had not created any type of categorization system for program content and so assessing program choice trends over time to understand program content relative to impact was a cumbersome process.
- In addition to the annual retreat, Fellows desired more opportunity for peer learning in the development of plans, and more communication among themselves about the progress of plans.
- There has been no regular communications process for those involved in the nominations or selection process to learn about plans being undertaken or their results.

Strengths and Weaknesses: Impact

Strengths

- There are five dimensions of impact, all of which show specific positive results from the Program.
 1. Personal Experiences: The overwhelming majority of Fellows feel the program has made a significant difference in their leadership capacities.
 2. Results for Organizations and Communities: There are clear instances of improvements in the Fellow's nonprofits, and the communities they serve, that Fellows can and have cited in their reports to the Foundation
 3. Organizational Growth: Many Fellows who remained with their original nonprofits and have had five or more years of leadership after the Fellowship have seen growth in revenues and growth in philanthropic contributions, enabling their services to grow as well.
 4. Networks: Over time, the process appears to boost the leadership networks of those who are awarded the Fellowship.

Challenges

- The Foundation has not developed any system for gathering or maintaining information on impact, qualitative or quantitative. The only baseline is the information gathered for the current assessment.
- Community leaders have no knowledge of the impact of the Fellows except in cases where a Fellow is a personal contact.

Strengths and Weaknesses: Awareness

Strengths

- Those who are aware have deep respect for the goal of the program and for the Fellows themselves.
- Those who are not aware have a great desire to learn more.

Challenges

- The Foundation website presents the names and affiliations of the Fellows but little information on who they are, why they were selected, or what they have accomplished.
- There is very little awareness of the Fellowship Program outside of a small circle of those who have been associated with it or with the Fellows.
- Generally, and even among Fellows, there is no awareness of the impact of the program on nonprofits or on the community. No stories of impact have been lifted up for broader communication.
- There is little media coverage of the Fellowship Program or of the Fellows.

Strengths and Weaknesses: Networks

Strengths

- The Bonfils-Stanton Foundation annually gathers Fellows together in a retreat to share their experiences and to continue to build their leadership skills. Each year's Fellows also constitute a "class" some of which regularly get together even after the Fellowship is completed
- Fellows value the network that the Fellowship creates as one of the most important learning benefits of the Program. As one "We Model" developed at the 2014 Retreat depicted, the "root system" of relationships that continues to nourish the individual Fellows.

Each Fellow is unique. This is what people "see" as the Program



But an equal or greater value is the network that nourishes the individual and the group

Challenges

- Much of the networking is informal. There is no structured Fellow support network.
- Hence, for some, especially geographically proximate, it is easier to stay in touch than for others.
- The benefits of networks are universally desired but only partially accomplished.
- A solution needs to be a Fellow-led and not burden staff or Foundation resources.

What can be learned from peers?

- Changing Our World interviewed program managers at five peer foundations with leadership fellowships programs:
 - The Durfee Foundation
 - El Pomar Foundation
 - Bush Foundation
 - Evelyn and Walter Haas, Jr. Foundation
 - The Meyer Family Foundation
- Peers are struggling with many of the same issues as the Bonfils-Stanton Foundation:
 - Setting clear goals.
 - Criteria for Fellows that lead to diversity of experience and levels of achievement.
 - Selection process that is objective yet informed.
 - Implementation process that ensures the resources are used as intended, but retains some flexibility.
 - Performance metrics that:
 - Have a meaningful definition of achievement
 - Are realistic within a meaningful timeframe
 - Reflect objectivity
 - Are based on some type of control group

How can the Program be strengthened?

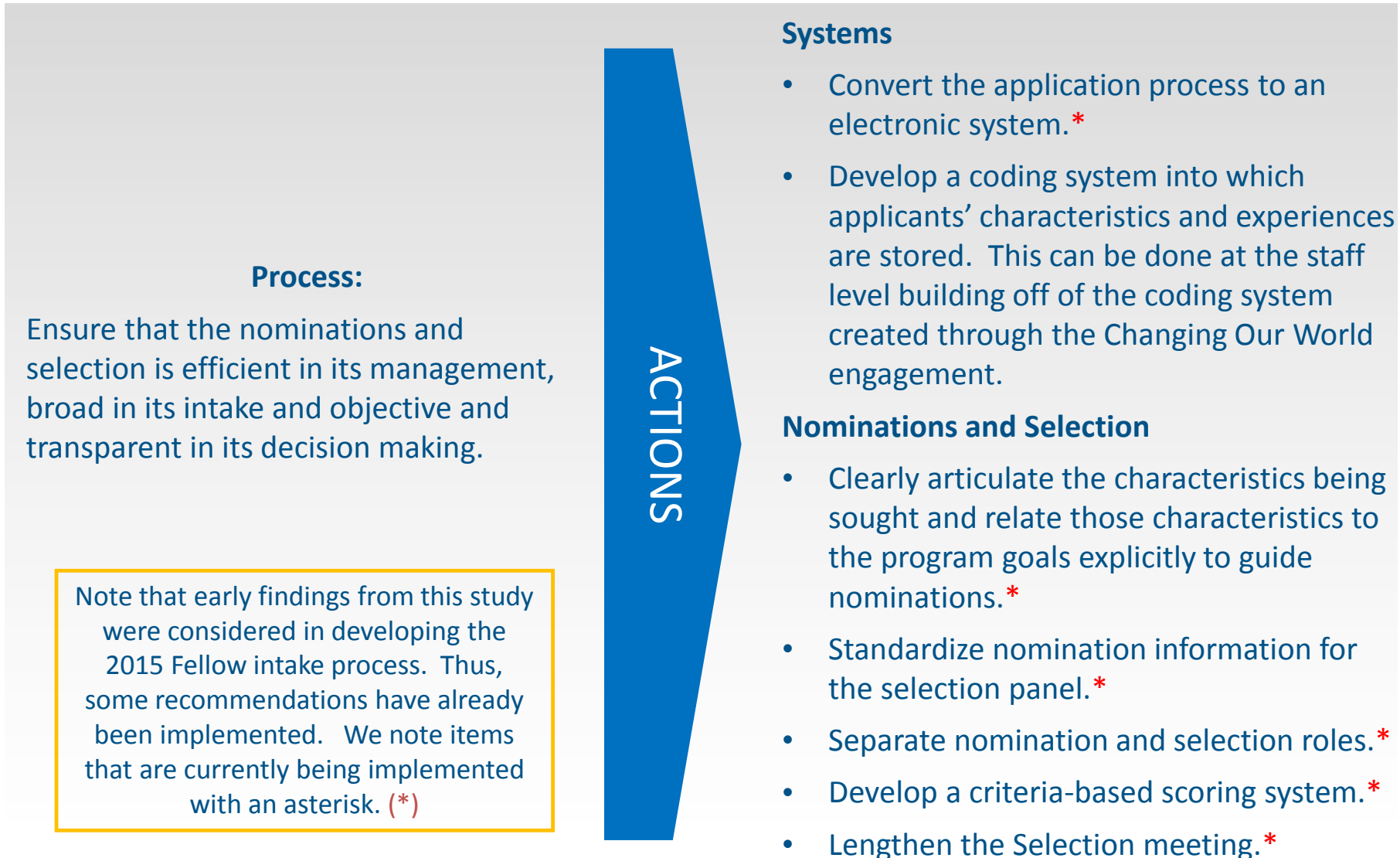
Goals:

Ensure Consistency and Clarity of Goals

ACTIONS

Ensure that the 2004 proclamation language, which connects individuals, nonprofit leadership and community, is the flagship of the program, repeated and clearly expanded on the website, and included in all recruitment and selection materials. If geography or other aspects of diversity are important parts of the program goal, this should be included.

How can the Program be strengthened?



How can the Program be strengthened?

Impact:

Develop a purposeful system for gathering information on the ways in which the Program affects the Fellows and their nonprofits and communities

ACTIONS

- Amend the existing final report submission form to include a structured reporting section for examples of Fellowship impact on:
 - The individual
 - The Fellow’s nonprofit
 - The nonprofit on the community
- Conduct “exit interviews” with each Fellow and with each Fellow’s Board chair to further probe impact.
- Survey Fellows every two years for changes in their professional status and impact stories.
- Repeat the Foundation’s 2004 Nonprofit Leadership survey, and do so every five years.
- Become a national leader with other Foundations who support leadership grantmaking to improve impact measurement.

How can the Program be strengthened?

Networks:

Develop a Fellow-driven formal network that can be Fellow-administered and can overcome the geographic distances inherent in being a statewide program.

ACTIONS

- Invite a Task Force of Fellows to gather at the Foundation to plan the details (perhaps prior to the 2015 retreat convening).
- Provide a Foundation-based web platform as a network base.
- Develop a Fellows-only social media locus, and ensure that network strategy accommodates geographic breadth.
- Annually feature one non-Denver Fellow on the Bonfils-Stanton Foundation website for the Fellowship Program, and have that Fellow interviewed by a Denver Fellow, to emphasize the state-wide scope of the program.

How can the Program be strengthened?

Awareness:

Be much more proactive in raising the awareness of the Program and its accomplishments as a means both for recognition and for increasing the range and diversity of Fellow nominations from the Colorado leadership community.

ACTIONS

- Place the Fellowship Program at the top of the Foundation’s communications priority list.
- Deepen the communications strategy at Fellowship award announcement.
- Actively seek to place stories of impact in the media.
- Re-structure the Fellowship portion of the Bonfils-Stanton Foundation’s website to feature stories of impact on the Fellows’ nonprofits and on the community.