

Executive Coaching Project Evaluation of Findings

EXECUTIVE SUMMARY

Study conducted by
Harder+Company Community Research

CompassPoint
NONPROFIT SERVICES

Introduction

What promise does coaching offer to nonprofit leaders? What impact can coaching have upon developing and sustaining effective leaders within their organizations and the nonprofit sector?

These were the questions that drove a year-long project studying the experiences of 24 executive directors who received leadership coaching through CompassPoint Nonprofit Services. We wanted to know more about this relatively new practice that promised to be a potent form of support, both to new leaders and to EDs who struggle to sustain themselves in the midst of the many challenges of their jobs. There are very few published studies on coaching in the workplace (even within the corporate setting, where executive coaching took hold), so we sought to learn as much as we could through a variety of evaluation activities conducted by Harder + Company.

We found that coaching has much to offer executive directors in their professional and personal development. Coaching consistently led the EDs to report significantly higher impact in specific management areas, stronger leadership skills and more hopefulness and confidence that they could create a more sustainable job for themselves. We were heartened to hear from several executives that the coaching helped them to cope with fast paced change and to navigate through a year of tremendous financial challenges.

The findings from the project evaluation exceeded our expectations. Alongside the statistically significant outcomes noted in this report are the consistently compelling stories of the executive directors themselves. We believe that coaching, for both individuals and groups, can play a much larger role in growing and maintaining leadership within the nonprofit sector. This report shares our learning on coaching and specific outcomes from this project that offer promise to the sector overall.

“ This is a new and promising tool for leadership development for nonprofit leaders who find themselves in an increasingly challenged and often isolated role ”

Sylvia Yee, Evelyn and Walter Haas Jr. Fund

Background to the Study

The Executive Coaching Project was inspired by two studies on executive leadership in the nonprofit sector—“Leadership Lost: A Study on Executive Director Tenure and Experience” (1999) and “Daring to Lead: Nonprofit Executive Directors and Their Work Experience” (2001). The findings from these studies underscored the need to develop various strategies for supporting and retaining leadership talent in the nonprofit sector. Executive directors are called upon to be strong managers, strategic thinkers, reflective philosophers, successful fundraisers and public speakers, and inspirational leaders.

Key recommendations from both studies included recognizing leadership and management skills as essential assets for organizations—assets that must be strengthened and sustained.¹

The Executive Coaching Project represented one support strategy suggested in the two aforementioned studies. While coaching has been a professional development resource in the business world, nonprofit leaders and staff have only recently come to realize the benefits of coaching for learning to cope with the multiple challenges and stresses of nonprofit management.

CompassPoint Nonprofit Services partnered with Marin Nexus and the Resource Center for Nonprofits, Sonoma County, to develop and implement the Executive Coaching Project, which was funded by the Richard and Rhoda Goldman Fund and the Evelyn & Walter Haas Jr. Fund. The project was evaluated by Harder+Company Community Research, a private social research firm.

The project provided 40 hours of one-on-one coaching to twenty-four executive directors (EDs) from November 1, 2001 through November 30, 2002. All EDs had held ED positions for four or fewer years. In addition to being individually coached, EDs were invited to direct up to ten of their coaching hours for use with senior staff and Board of Directors members. EDs also participated in three peer

How is coaching distinct from working with a consultant or a trainer?

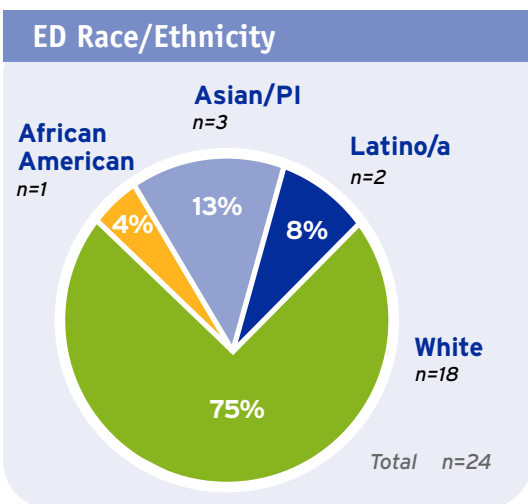
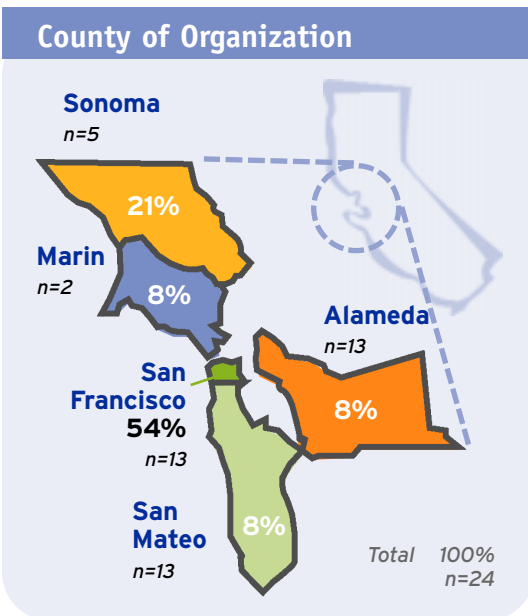
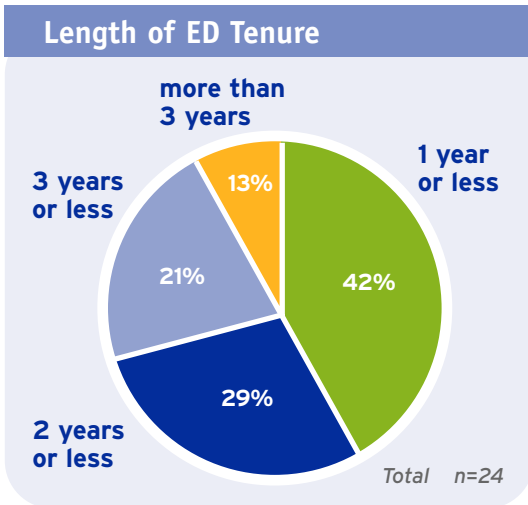
Coaches provide an ongoing inquiry process for coachees to create their own solutions as opposed to imparting expertise, findings and recommendations.

Coaches provide encouragement and accountability for executives to act rather than doing any work for the executives or their organizations themselves.

Coaching deepens a leader’s self-awareness of their unique strengths and talents as a foundation for improving their management and leadership talents and for reshaping their jobs to fit their skills and talents.

¹ “Daring to Lead: Nonprofit Executive Directors and Their Work Experience” (2001). Peters, Wolfred.

Characteristics of Participating Executive Directors and Their Organizations



(continued on next page)

learning roundtables to enrich their coaching experience and to establish an ongoing connection with other EDs participating in the coaching project.

EDs were matched with one of 12 coaches pre-screened by CompassPoint. Each ED chose their coach after interviewing at least two coaches, looking for an approach that would suit their learning style and experiences. Project coaches had all completed one or several training programs offered by the Coaches Training Institute, Coach University, New Ventures West, and the Rancho Strozzi Institute. Nine coaches were white, two were African American, and one was Asian/Pacific Islander. Nine were female and three were male.



Similar to coaching world class athletes or corporate execs, executive coaching involves challenging and supporting executive directors to achieve higher levels of performance through expanding their capacity to take effective action. Different from athletic coaching, it usually happens in brief yet regular coaching calls on the phone. Coaching typically occurred several times over each month, for 30 minutes to an hour at a time.



Methodology

The evaluation used a mixed methods approach (i.e., both quantitative and qualitative methods) and relied upon both primary and secondary data. The design included a survey completed by the participating Executive Directors (EDs), semi-structured interviews with EDs, and case studies of five EDs.

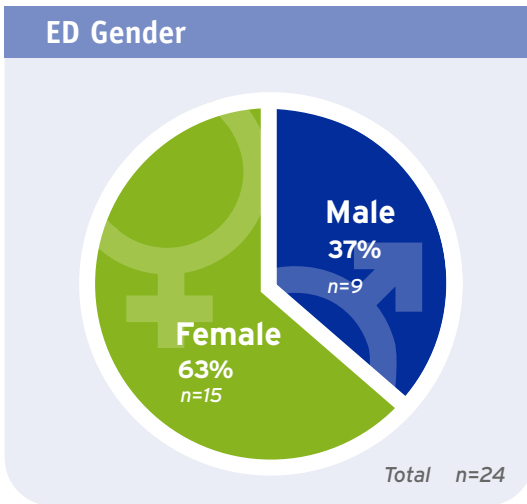
The ED survey was administered by email at the beginning of coaching (baseline), halfway through the coaching experience (midpoint post-test), and upon completion of coaching (final post-test). Twenty-three of the twenty-four participating EDs completed surveys at all three time points.

Twenty EDs participated in the semi-structured telephone interview at the end of the coaching project. All participants submitted their final email survey before participating in the interview to prevent the interview from biasing their survey responses.

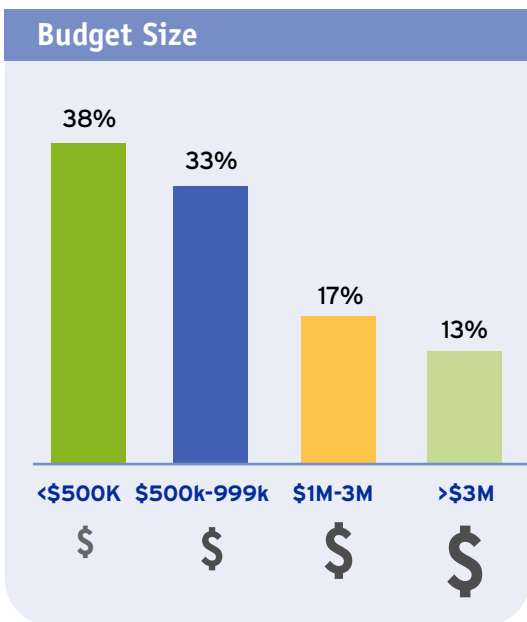
Five EDs participated in case studies of their coaching experience. The intent of the case studies was to provide an in-depth illustration of five different ED experiences with coaching. Case studies consisted of an observation of a coaching session, an extended semi-structured interview with the ED, interviews with one staff and/or one Board member at the ED's organization, and review of the ED's learning contract and coaching logs.

EXHIBIT 1

Characteristics of Participating Executive Directors and Their Organizations (cont'd)



Organization Type	n	%
Arts	1	4%
Education	2	8%
Environment	1	4%
Human Services	14	58%
Social Justice	2	8%
Other	4	17%
Total	24	100%



Executive Director Perspectives on Coaching

EDs had a wide range of expectations for coaching before they joined the Executive Coaching Project. Some believed that a coach would provide advice and guidance. Others thought coaches were like cheerleaders who stand on the sidelines shouting, “You can do it!” Coaching incorporates both of these strategies, but there are also other components. Most EDs were clear that coaching is not mentoring, nor is it therapy. After going through the coaching experience, EDs noted the aspects of coaching that makes it unique.

Final interviews with EDs and a post-project group discussion highlighted the following distinctive aspects of coaching:

- ▶ Coaching provides an ongoing relationship that fosters confidence, trust, and deep dialogue.
- ▶ Coaches encourage EDs to be accountable to their goals.
- ▶ Coaches can be flexible in addressing a wide range of issues in response to the ED’s needs because it is an individualized service.
- ▶ Coaching challenges EDs to find their own answers.
- ▶ Coaches support EDs in honoring and celebrating themselves and their achievements.
- ▶ Coaches are available to EDs on an as-needed basis and therefore can be called upon at critical times.

In interviews, EDs emphasized one distinctive element: Coaches encourage EDs to find their own solutions. One participant commented:

I expected someone more like a sports coach. I can envision the coach standing before me and telling me what to do. And that was far from what happened. The real experience was to learn how—and it was difficult—to have someone pull information out of me.

This process of discovering one’s own answers and solutions proved useful in developing leadership effectiveness, according to one ED:

...when I learned about what coaches do to help EDs like myself, I thought, “This is exactly what I needed,”—someone who will be there to help, not necessarily mold you into the leader you want to be, but bring that out from you, because it’s already there, and just pulling that out from you and saying, “You can do this.” That’s all I needed.

OVERALL IMPACT OF COACHING

Satisfaction with the Coaching Experience



Key Findings - Satisfaction with Coaching Experience

With few exceptions, EDs widely agreed that coaching met and often exceeded their expectations

Satisfaction with the coaching experience scored 4.6 on a scale of 1 to 5

Executive Directors agreed that their coaching outcome met and often exceeded their expectations. On their post-test surveys, they reported a high degree of satisfaction with their coaching experience, with a mean rating of 4.6 on a scale of 1 to 5, where 1 represents “not at all satisfied” and 5 represents “very satisfied.” Satisfaction for some EDs was linked to the ongoing source of support that coaching provided. For others, the practical nature of the coaching was the key to their satisfaction (e.g., assistance with strategic planning). Others described that they found “spiritual strength” through coaching and that it was “motivating and inspiring.”

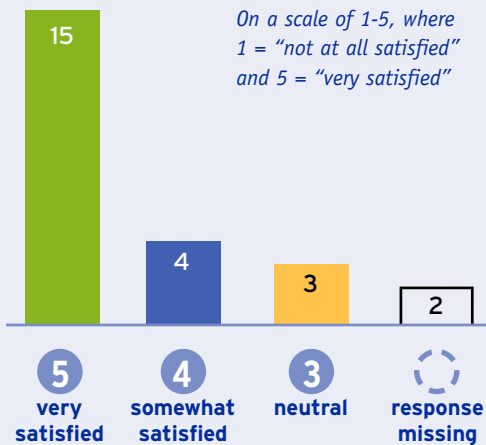


It more than exceeded my expectations because I really doubt I'd still be here without coaching; in the face of really difficult changes in management...I got regular, reliable feedback on how I was doing during a period of change.



EXHIBIT 2

Satisfaction with Coaching



Specific Outcomes of Coaching

The evaluation instruments were designed based on the findings from the “Leadership Lost” and “Daring to Lead” studies in an attempt to explore a number of possible coaching outcomes.

Ultimately, the evaluation findings revealed six main areas where the coaching had an impact on participating EDs and their organizations:



Impact on Leadership and Management



Key Findings - Leadership

- Increased confidence in exercising leadership
- Improved ability to connect with the organization's vision
- Increased confidence in leading the organization toward fulfilling the vision

Key Findings - Management

- Increased task completion and productivity
- Improved personnel management skills
- Better relationships with staff and Board of Directors (e.g., communication skills)



“[My coaching experience] was profound for me in terms of really identifying and embracing my leadership style and making me much more comfortable...this had pretty amazing repercussions for me and my organization.”



Overall, many EDs realized success with coaching in the development of leadership skills as well as significant improvement in their productivity, delegation skills, and staff relationships. In particular, in their interviews, many EDs described their improved ability to connect with the organization's vision, and increased confidence in leading the organization toward fulfilling the vision, as a result of coaching.

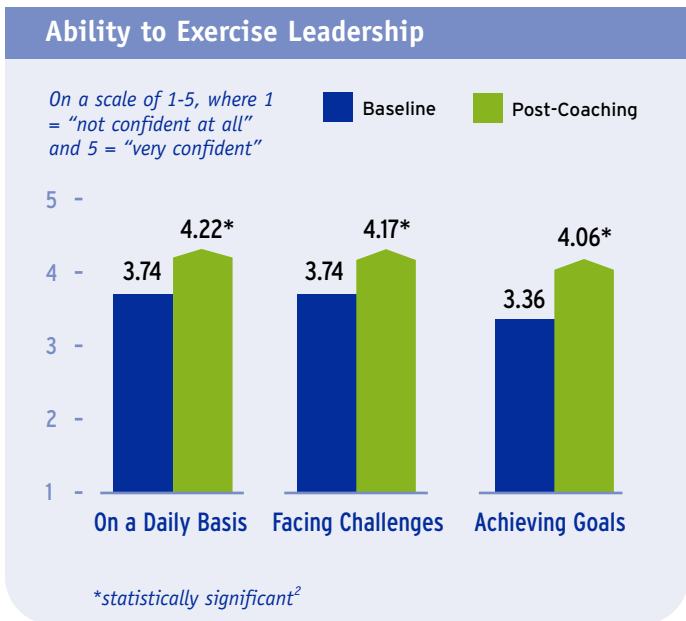
Another common interview theme was that coaching helped EDs accept their approach to leadership. For one ED, this benefited not only herself but also her organization. She expressed, “[My coaching experience] was profound for me in terms of really identifying and embracing my leadership style and making me much more comfortable with that and this had pretty amazing repercussions for me and my organization.”

Overall, many EDs experienced a general increase in confidence in their leadership abilities. As articulated by one ED, “...When push comes to shove, I can really provide good leadership. ...I gained a greater sense that I really know this organization and I know what it needs to succeed.”

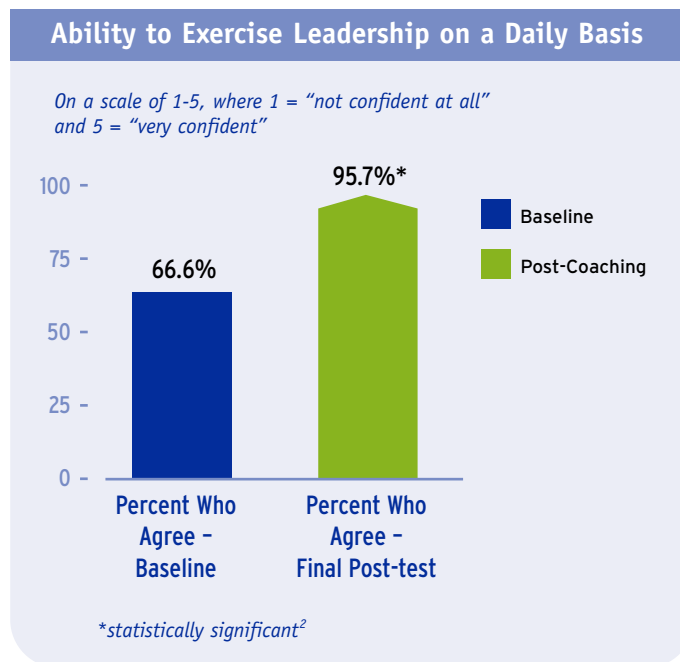


There were some major and bold first year decisions I made about reorganization of programs and closing programs in the organization...to save the organization financially. Coaching immeasurably helped me go forward with these decisions, and they turned out to be great decisions.





EDs also noted improvement in three management skill areas as a result of coaching: 1) task completion and productivity, 2) personnel management skills, and 3) relationships with staff and board members (e.g., communication skills). One ED said coaching helped him learn "purposeful delegation," such that he had a solid rationale about why some things could be delegated and others could not. Several EDs found coaching helpful in providing concrete strategies for dealing effectively with personnel issues, such as completing performance evaluations and letting staff go. Additionally, coaching provided EDs with support during the process of confronting such issues.



² In all survey tables, a p value was indicated. A p value less than or equal to .05 indicates that it is highly unlikely that the finding (i.e., the increase or decrease in the means listed) was by chance. In other words, the finding is likely a reflection of reality. When a p value is less than or equal to .05, the finding is referred to as "significant!". A p value greater than .05 indicates a greater likelihood that the finding was by chance and thus is not necessarily a reflection of reality. For the purposes of this Executive Summary, all tables listed are statistically significant. All tables and p values are presented in the complete 47 page study and are available for download at www.compasspoint.org.

Organizational Impact

On their surveys, EDs reported significant improvement in the clarity of their vision for the organization, as well as staff and Board alignment with the mission. Further, they reported significant improvements in organizational processes and structure, such as in decision making and in setting policies and procedures. According to interviews, coaching also had an impact on how some EDs dealt with financial instability at their organizations. For example, one organization was able to make payroll and another avoided closing down as a result of EDs' improved skills and increased confidence in the area of fundraising.

What

I got from my coach is help in re-visioning what fundraising is all about, my relationship to it...and demystifying and de-terrifying fundraising. The important thing was his experience in nonprofit management and fundraising. He guided me through it from a place of "I hate this" to "This is different from what I thought, maybe I can have fun with it, and maybe I can be good at it."

Overall, many EDs interviewed reported that their organizations "work better" since coaching began. One ED believed that improvement in their programs resulted from the strategic planning process that her coach helped her with. Another ED reported in his interview that his coach helped his with his approach to grant writing, which had a direct impact on his organization's ability to raise money. Another ED attributed this phenomenon to the impact coaching had on his confidence.

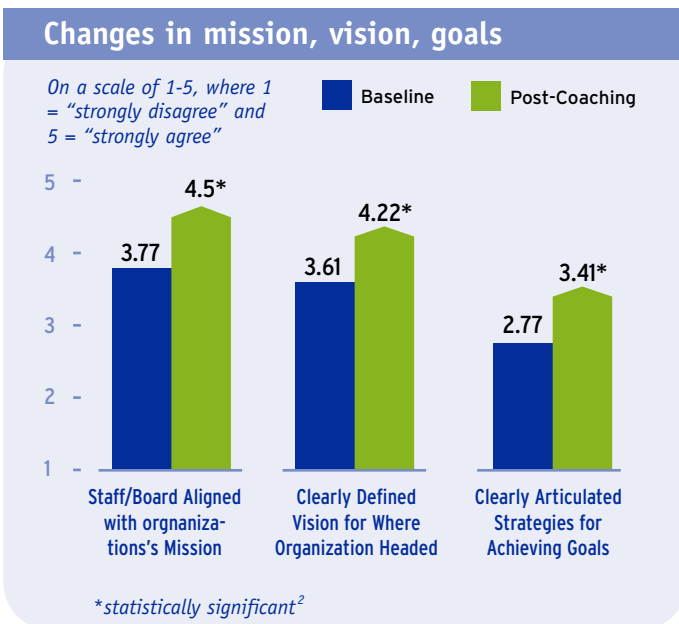
Key Findings – Organizational Impact

Improvement in:

- Areas related to organizational mission and vision
- Clarity of decision-making processes & roles & responsibilities of staff
- Organization's fundraising capacity & financial stability
- Organizational effectiveness including communication & teamwork

She didn't teach me how to write [grants], but she taught me to just use my gut...when people review grants, they see the heart of what you're talking about...before I knew it, we had grants coming in."

EXHIBIT 4



Beyond developing the EDs' skills, coaching had a direct impact on EDs' organizations through two primary mechanisms:

- Via the project coach working directly with staff and/or the Board. Thirteen of the 24 EDs (54%) utilized some of their coaching hours to work with their senior staff or board members;
- Via the ED using coaching skills within the organization. In this case, EDs successfully adopted the approaches modeled by their coaches. A common theme among those EDs who learned the coaching role was to emphasize and celebrate staff achievements, with the goal of inspiring confidence. One ED remarked that, ultimately, coaching taught her "how to use coaching techniques to draw out and...pull the best out of my staff and Board."



It's like a ripple effect: my coach teaches me, and I teach my staff. Even more so, just being able to inspire confidence in others has had a great impact.

A lot of times an issue would come up about staff relationships. The direct communication skills that I learned with the coach helped me work through personnel issues with a clear head.



In interviews, several EDs reported improvements in the way their organizations operate internally as a result of coaching. At some organizations, both communication and teamwork among staff were strengthened. Organizational outcomes in this area included improved staff ability to work with different personalities, increased assertiveness among staff in expressing their needs, and improved staff ability to resolve conflicts without the need for ED intervention. Even subtle changes in the way internal communication works had noteworthy effects, as described by one ED: "Little things like a phone call from the president of the Board are different now than it would have been without the coaching. The president thinks more about communicating directly with me about things rather than gossiping."

Finally, coaching had an influence on some Boards of Directors in a way that enhanced the effectiveness of the organization overall. According to one ED, the Board's role shifted as a result of coaching: "Coaching really helped me to understand the role of the Board, and as a result to really work to change the culture and responsibilities of the Board...changing it to a fundraising Board, which it was not at all when I first started." In another case, the process of coaching helped inspire Board members' personal commitments, leading to increased levels of involvement on their parts.

Some EDs reported that their organizations supported ongoing coaching for the ED after the Executive Coaching Project ended. As one ED articulated, "The organization is continuing to pay for [my coach] and that shows that coaching has impacted the organization." **Anecdotally, at least 11 of 24 EDs continued working with their coaches after the project ended.**

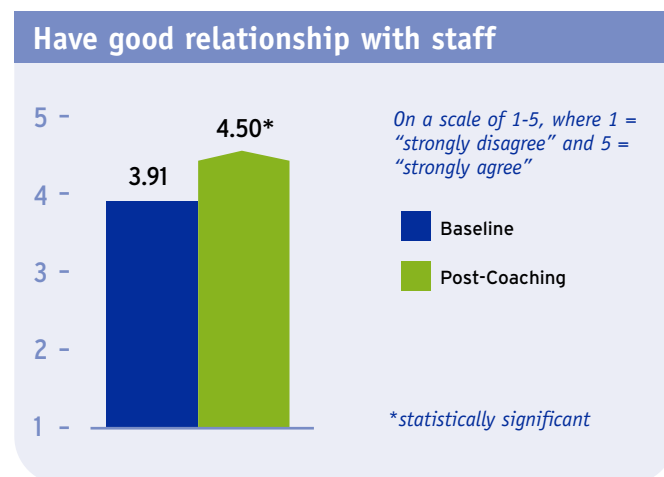


The process of coaching helped inspire Board members' personal commitment, leading to an increased level of involvement on their part.

The impact has been more about me feeling more confidence in my interactions with [my Board chair] and him feeling better about what I'm doing in my job and having confidence in me.



EXHIBIT 5



Impact on ED Attitudes and Beliefs

Overall, EDs reported a statistically significant increase in their effectiveness at balancing the demands of their personal and professional lives between the baseline survey and the final post-test. In interviews, EDs described some of the changes in their personal lives, such as increasing physical exercise, finding new creative outlets, and improving relationships with friends and family.

It is noteworthy that coaching appeared to have both a direct and indirect impact on EDs' personal lives. In situations in which the coaching focused directly on improving the personal/professional balance, many EDs were able to make such improvements.

In addition, when coaching helped EDs feel more confident at work, feel happier in their jobs, or develop interpersonal skills, their personal lives and relationships were positively affected. One ED explained, "Feeling better about work trickles to feeling better in my personal life. I'm a nicer person to be around with at home. ...In general, because we were dealing with issues around self-perception and self-confidence, it couldn't help but impact me personally..." In addition, two EDs mentioned in their interviews that they found themselves being less judgmental with their families and others as a result of coaching.

Key Findings - Impact on Attitudes and Beliefs and on Personal Life

- Increased effectiveness at balancing the demands of their personal and professional lives
- Increased confidence at work which resulted in increased happiness at their jobs, better developed interpersonal skills, and feeling better in personal lives and relationships



In terms of confidence, I had a coach do a 360-degree assessment. She interviewed people about me and shared the results from that. The good points were an affirmation and the areas of improvement were things that I already knew about. ...The 360-degree assessment grounded me and the realities of my strengths. ...The coaching helped me with my confidence.



Impact on ED Job Satisfaction, Tenure & Turnover

There were no statistically significant changes over time in the level of job stress and burnout reported on their surveys.

However, in their interviews, several EDs reported that coaching helped to reduce stress and burnout by encouraging them to take vacations and time for themselves on a regular basis. In addition, several EDs reported that their overall job satisfaction increased during their coaching experience. EDs attributed their increased satisfaction primarily to the increased confidence that coaching inspired.

One ED believed that coaching helped increase her job satisfaction through the support it provided, which made her feel like she was not alone. The coach taught her how to ask for help from her staff and Board, which she believed would prevent isolation even after coaching ended.

A comparison of the baseline and final post-test surveys suggests that there was either 1) no change in the length of time EDs planned to remain at their organizations, or 2) the length of time EDs planned to stay was reduced. However, the interview findings suggest a wider range of tenure-related outcomes. The four different outcomes described in the interviews were:

- ▶ EDs had already stayed or now planned to stay longer at their organizations than anticipated because of coaching.
- ▶ EDs gained a self-awareness through coaching that led them to question whether they want to remain at their jobs.

Key Findings - Impact on ED Job Satisfaction, Tenure & Turnover

- Coaching helped reduce stress and burnout
- Overall job satisfaction increased
- Level of dedication to working in nonprofit sector re-affirmed



I love what I'm doing, and I believe in the cause that we're fighting for. Now...I feel that I have the capability to take this agency to the next level. ...Realizing that I can do the job increases my job satisfaction.

I still work a lot, at least 60 hours per week, but my burnout is less... My coach helped me understand that if I don't take care of myself, then I won't be any good for the organization.



- ▶ EDs' tenure plans did not change as a result of coaching.
- ▶ EDs did not comment on their plans to stay at their jobs or in the nonprofit sector but asserted that, regardless of their future career path, their coaching experience would prove valuable.



The direct communication skills that I learned with the coach helped me work through personnel issues with a clear head; before I worked with the coach, it was 'Oh my god, it's a crisis!' Now, I just take a step back and come up with a solution.



Several EDs asserted that their level of dedication to working in the nonprofit sector was re-affirmed. One ED remarked, "The coaching itself has a neutral outcome.... Before I had this experience, I planned to be an ED for 10 years. And I still plan to be an ED."



The experience has reinforced my desire to keep from burning out. I don't want to find myself burned out. Nonprofit is my life's mission. ...The years of experience tell me that I want [to be an ED], and I want to do it better. Coaching keeps it on my mind every day.



[Coaching] more than exceeded my expectations because I really doubt I'd still be here without coaching. In the face of really difficult changes in management...I got regular, reliable feedback of how I was doing during this period of change. It made me feel that I was on the right track. I doubted myself and was hard on myself. Now I feel successful...



Sustainability of the Effects of Coaching

The interview findings suggest that much of what EDs learned during their coaching experience will extend beyond the one year that they participated in the project. There are several techniques and skills that EDs have integrated into their day-to-day work, which will continue to impact the ED and the organization in the future.

CONCLUSION



By empowering EDs and their organizations, coaching appears to contribute to changing nonprofit culture.



Overall, coaching appears to have had a profound impact on EDs and the organizations they lead. For many EDs, benefits included getting new insight into their strengths and weaknesses, improving their leadership and management skills, and increasing their confidence in their ability to do their jobs well. Various participants found they were better able to address personnel issues, delegate tasks appropriately, fundraise for the organization, work effectively with their Boards of Directors, and communicate with staff and Board. For organizations, benefits included increased financial stability, improved internal communications, and improved ability to fulfill the organization's mission and vision due to improved ED leadership skills. Coaching appears to be a relatively inexpensive, high impact way to develop the leadership of EDs while they are in their roles. Unfortunately, too many of our leaders practice sacrificial rather than sustainable leadership. It helps to move EDs and organizations from a "we're a poor nonprofit" mentality to a place of power and impact, psychologically, organizationally, and in the world. In this way, coaching promotes EDs and their organizations to embrace their community leadership role and set an example for the nonprofit world.

The complete evaluation of findings from the Executive Coaching Project is available for purchase or free download at www.compasspoint.org