

A Report Prepared for

The Center for Leadership Innovation

Utilizing One-on-One Coaching and Peer Coaching Groups to Enhance Nonprofit Leadership

The Center for Leadership Innovation's Pilot Coaching Project

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Prepared by

BTW *informing change*

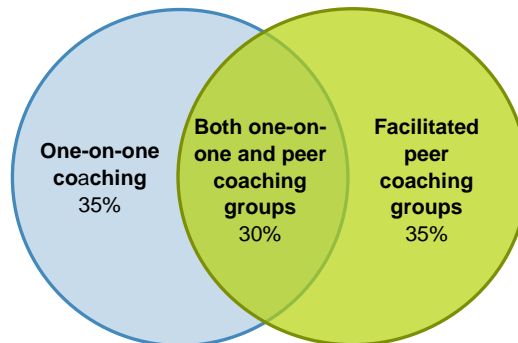
Regina Sheridan • Kim Ammann Howard • Kaitlin Arena

INTRODUCTION

The Center for Leadership Innovation (TCLI)—formerly known as the Development Training Institute—develops diverse leaders who initiate and share approaches to addressing social issues through community building initiatives.

In 2009, TCLI received funding from CompassPoint Nonprofit Services through the Coaching and Philanthropy Project. These funds were used to support TCLI’s pilot coaching project, which offered TCLI alumni, who participated in leadership trainings from 2005 through 2009, an opportunity to participate in: 1) one-on-one coaching, 2) a facilitated peer coaching group, or 3) both one-on-one coaching and a peer coaching group. A total of 17 emerging leaders¹ were selected for the pilot project, with each participant receiving one of the two types of coaching or a combination of both as indicated below.

Exhibit 1
Percentage of TCLI Alumni that
Engaged in Each Type of Coaching Support
(N=17)



This brief summarizes findings from an exploratory evaluation of the pilot project which BTW *informing change* conducted. In this document, we describe the pilot coaching project model; provide background information on the participants, one-on-one coaches and facilitators and their motivations for project participation; the value and impacts of both types of coaching; and key reflections and considerations to strengthen this coaching project model.

¹ In this report, emerging leaders are defined as: “individuals who executive directors want to invest in for the future leadership of the organization; individuals may be at various stages of their career.”

Evaluation methods

Data were collected from a variety of sources including a survey, which 94% of participants completed; five interviews with participants who took part in different aspects of the coaching; an interview with each of the peer coaching group facilitators; two separate focus groups with four one-on-one coaches; and a review of secondary materials, including TCLI's leadership training summaries, participant and one-on-one coach applications, matching spreadsheets, one-on-one coach summary reports and peer group meeting reports.

Although there is a high response rate for the data collection, potential limitations of the evaluation include the following: 1) the sample size is very small for each of the three types of coaching supports; 2) the project is a pilot and in the preliminary stages of administration; 3) no control group was utilized to examine the affect of not receiving coaching; 4) participants attended TCLI leadership trainings over a range of four years; and 5) participants work in different positions, organizations and under different contexts. As a result of these limitations, caution is warranted in generalizing these findings to other individuals or programs.

Coaching compared to other leadership development supports

The processes of one-on-one coaching and peer coaching groups are often confused with other types of leadership supports. In Exhibit 2 on the next page, we provide brief definitions of various types of leadership development supports to point out key distinctions.²

² These definitions are drawn from research conducted by the Coaching and Philanthropy Project (www.compasspoint.org/coaching).

Exhibit 2
Definitions of Leadership Development Supports

One-on-one coaching

generally refers to the process of one-on-one support for leaders to make more conscious decisions and actions about personal and professional issues that affect job performance and organizational success.

Peer coaching groups

have peers come together to coach each other in confidential and structured meetings. Peers offer each other coaching to address leadership needs. In the process they hone their own coaching skills and strengthen relationships.

Mentoring

is a process where an established leader grooms an individual to fill a role or further succeed in their position by teaching proven methods and introducing them to a network of contacts.

Organizational consulting

focuses more broadly on the whole organization, typically working with executive leaders, senior staff and board members on structures, policies and procedures to improve the efficiency of the organization.

PILOT COACHING PROJECT MODEL

One-on-one coaching

CompassPoint Nonprofit Services worked with TCLI to help match participants with a one-on-one coach. CompassPoint staff interviewed the participants to determine their reasons for wanting a coach, their coaching goals, and key characteristics that they desire in a coach. Next, they provided participants with the names and contact information of up to three coaches. Participants were responsible for setting up an interview with potential coaches. CompassPoint provided participants with a list of interview questions to help them with the selection process and assure an appropriate match. After selecting a one-on-one coach of their choice, participants scheduled between 8 to 12 hours of coaching over a 5 to 6 month period.

Facilitated peer coaching groups

TCLI's peer coaching groups were led by two professional facilitators who have extensive experience in nonprofit peer group facilitation. Together with TCLI, they utilized participant application data (e.g., past experience with coaching, leadership challenges, geographical location) to compose three peer groups. In order to provide groups with the utmost level of comfort and confidentiality, they worked to arrange participants in groups with others who had similar experience levels and were from different geographic areas. The

Estimated costs*

One-on-one coaching
\$2,075 per person

Peer coaching groups
\$2,375 per group
(of up to four people)

* Based on an approximation of 12 hours of support, matching and group preparation. Additional retainers may be required for ongoing support.

facilitator role has three main responsibilities: 1) scheduling the peer coaching groups, 2) modeling and affirming basic coaching skills (e.g., active listening, probing questions), and 3) facilitating the conversation so that everyone has an approximately 20 minute period to share coaching and identify specific action steps.

BACKGROUND & MOTIVATION FOR PARTICIPATING

Exhibit 3 Participant, One-on-one Coach and Peer Coaching Group Facilitator Background

Participants (n=16)

- Average age is 40 years
- Position at organization:
 - 50% senior managers
 - 31% mid-managers
 - 19% other positions³
- Gender:
 - 87% female
 - 13% male
- Race/Ethnicity:
 - 50% African American
 - 37% Latina/Caribbean
 - 13% Caucasian

One-on-one Coaches & Peer Coaching Group Facilitators (n=8)

- All coaches are certified
- All are trained in coaching or facilitation
- All have experience working with nonprofit organizations
- Gender:
 - 75% female
 - 25% male
- Race/Ethnicity:
 - 38% Caucasian
 - 25% African American
 - 25% Latina
 - 12% Asian American

Gaining clarity about career paths is a high priority for coaching, according to:

- 100% of one-on-one coaching participants
- 80% of the participants involved in both coaching supports
- 33% of peer coaching group participants

Participants identify four main leadership challenges or motivating reasons for wanting to participate in the pilot coaching project. First, participants want to further their professional growth and skills (e.g., confidence, ability to develop staff, time management, delegation, communication). Second, they note that they had a good experience with their TCLI leadership training and welcome further support to implement learnings. Third, participants desire an opportunity to connect and network with other nonprofit leaders. Lastly, leaders are interested in gaining clarity about their career path (see box to the left). Even though specific reasons motivated them, some participants report that they were not exactly sure what to expect from the pilot program.

TCLI participants face similar challenges and leadership development needs as other emerging leaders in the nonprofit field. According to data in this evaluation,

³ Other positions include: a coordinator, a student advocate and a CEO, who had recently moved into her position.

as well as data drawn from the 2008 *Ready to Lead?* study, most emerging leaders need extra support to strengthen their leadership and management skills, to enhance confidence in their leadership style, to build strong connections and networks and to examine their vision and career trajectory.⁴

It was clear that the [TCLI] peer group participants were hungry for connection.

—Peer coaching group facilitator

One-on-one coaches and peer coaching group facilitators note that TCLI's leadership program foci and structure prompted them to become involved in the pilot coaching project. They note that TCLI's aspiration to strengthen leadership among nonprofits, especially those with leaders of color, drew them to the project. Some one-on-one coaches also report that they appreciated the fact that the coachees had completed TCLI's leadership training, since that typically means that participants are better prepared to take advantage of one-on-one coaching (e.g., identifying strengths and weaknesses, challenging oneself, creating action plans).

ADDED VALUE OF COACHING SUPPORTS

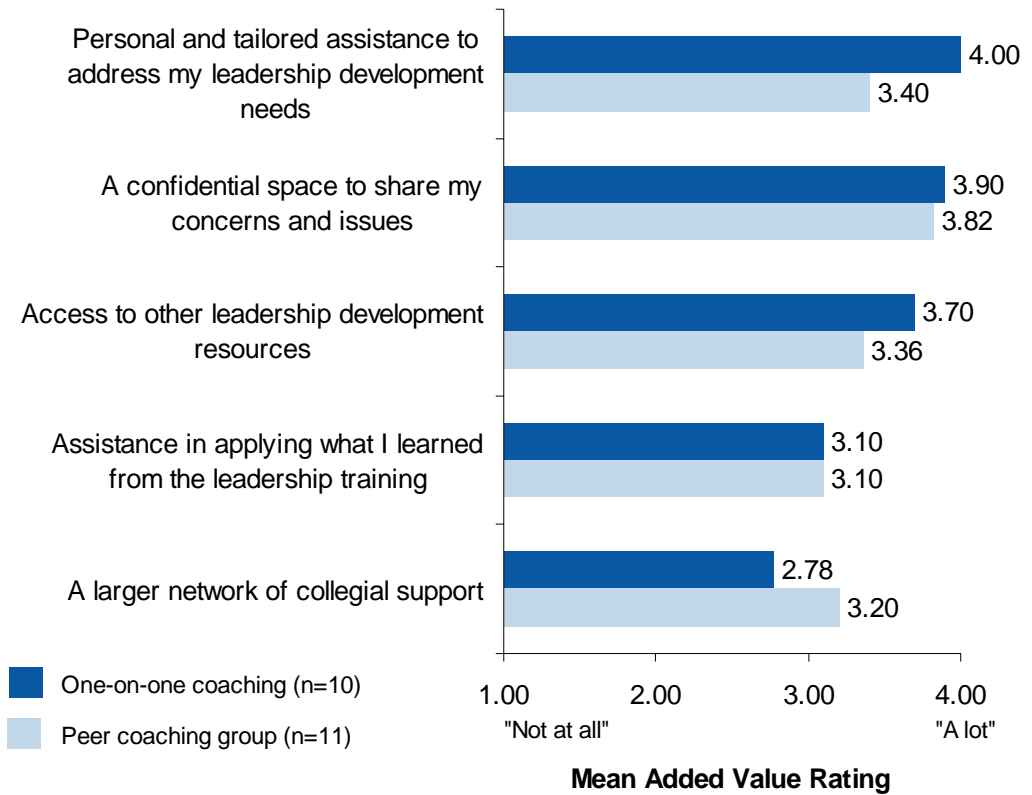
The one-on-one coaching and peer coaching groups provide TCLI alumni with supplemental support to explore issues and apply what they learn at previous leadership development trainings. Exhibit 4 on the next page illustrates the extent to which participants thought that each type of coaching added value to their previous leadership training.

Overall, participants value both types of coaching support. Among the different areas queried, participants' perceived values are fairly similar. The value of personal and tailored assistance is one exception in which those receiving one-on-one coaching report significantly greater value. Not surprisingly, those in peer coaching groups report significantly greater value in terms of a larger network of collegial support.

Participants of both one-on-one coaching and peer coaching groups note that the supports provide slightly different added value to a leadership development program. They express that the TCLI peer coaching groups are a productive space to explore issues (e.g., bounce ideas off of others, gain a variety of perspectives, help them think outside the box) while one-on-one coaching is a valuable opportunity to dive deeper into personal issues (e.g., strengths and weaknesses, barriers to development, career trajectory). They note that TCLI peer coaching groups, which were designed for enhanced networking, tend to lend themselves to the *development* of new ideas and approaches, while one-on-one coaching tends to be better for the *execution* of ideas and approaches. However, it is important to note that peer coaching groups are designed for different purposes and will have different value for participants depending on the groups' purpose (e.g., networking, problem solving).

⁴ Cornelius, M. Corvington, P. Rusega, A. (2008). *Ready to Lead? Next Generation Leaders Speak Out*. CompassPoint Nonprofit Services. San Francisco.

Exhibit 4
Extent to Which Participants Report that Coaching Supports Enhance the Value of Leadership Trainings⁵



Both the one-on-one coaching and peer coaching groups offer participants an opportunity to receive personal and tailored assistance. Since leadership trainings focus on broad approaches and field-level topics, coaching is a good complementary support that allows participants to hone in on specific areas of development. One-on-one coaches are especially likely to note how the flexible nature of their coaching allows shifts in participants’ goals as needed.

Coaching provides a confidential and unbiased place where leaders can dive deeper into their leadership development issues. Participants report that they are comfortable being honest and candid with their one-on-one coach and in peer coaching groups. They appreciate being able to be vulnerable without the fear of being judged. Some note how both types of coaching provide an opportunity to explore issues that they do not feel comfortable discussing with colleagues at their organization (e.g., career paths, tense supervisor

⁵ The number of people responding to each variable may vary since participants were given the option to mark “don’t know or not applicable.”

relationships), or even with others in the same field or city due to small organizational networks.

Coaching exposes participants to new leadership development resources.

While one-on-one coaches and peer coaching group facilitators provide participants with a range of leadership development resources, tools and contacts (e.g., personality assessments, books, time management tools), peers also share resources with each other during and in between group sessions. Participants note that they have shared resources regarding a variety of issues, including work-life balance, board development, communication techniques and healthy lifestyles.

The coaching builds participants' network of collegial support. This is especially true of the peer coaching groups; however, participants involved in one-on-one coaching also note that it built their capacity and ability to initiate new relationships with other nonprofit leaders (e.g., the one-on-one coach placing an emphasis on making connections with others). Bringing together a group of leaders in similar positions also helps build trust, camaraderie and a network of peers that participants can reach out to when concerns or issues arise in the future.

Participants found that both forms of coaching had a more moderate affect on helping them apply learnings from previous leadership trainings.

Considerations about how to leverage coaching supports for leadership training is explored on pages 14 and 15.

MATCHING PROCESS

One-on-one coaching

Participants appreciated the assistance from CompassPoint Nonprofit Services in selecting a one-on-one coach and the opportunity for them to interview coaches to determine who would best match their needs. They valued the diverse pool of coaches (see Exhibit 3 on page 5) and the way in which coaches clearly articulated their coaching approach and style.

Depending on a participant's personality and needs, different characteristics of a one-on-one coach play important roles in the matching process (Exhibit 5). Both participants and coaches agree that an intuitive connection is perhaps the most important factor to take into account when interviewing. The relationship should feel like a partnership—with the participant talking candidly, while the coach listens carefully and challenges the client.

As shown in Exhibit 5 on the next page, all participants think it is “moderately” or “very” important for a one-on-one coach to have sufficient coaching experience, training and solid credentials. On average, participants rate demographics (e.g.,

It was eye opening to see peers from around the country battling with similar issues, creating a bond with them and knowing how valuable another set of ears and eyes can be when you're in the middle of the chaos.

—Peer coaching group participant

I wanted a one-on-one coach who was a woman and a person of color, since one of my challenges was related to this. I wanted someone who had been in my shoes and could walk me through it.

—One-on-one coaching participant

ethnicity, gender and age) as the least important characteristics. However, as shown by the multi-color shading in the graph, some participants find demographics very important when considering a match, especially if it is related to a particular challenge they are facing at their organization (e.g., internalized racism, transitioning to a more family-friendly organizational culture). Participants also expect a one-on-one coach to have access to a wide range of tools, assessments and resources to support the coaching process.

Exhibit 5
Importance of Characteristics to Participants
Involved in One-on-one Coaching
 (N=10)



Peer coaching group facilitators

Participants note the importance of having facilitators who are knowledgeable about nonprofits, so that they understand nonprofit-specific terms and issues (e.g., fundraising, board development) and can establish credibility with the peer group. They value the fact that facilitators set expectations for the group, steered the conversation, encouraged participants to be open and kept the group on

[Our facilitator] allowed us to talk and didn't intervene too much. She steered us in terms of timing, was very encouraging and allowed us to be open.

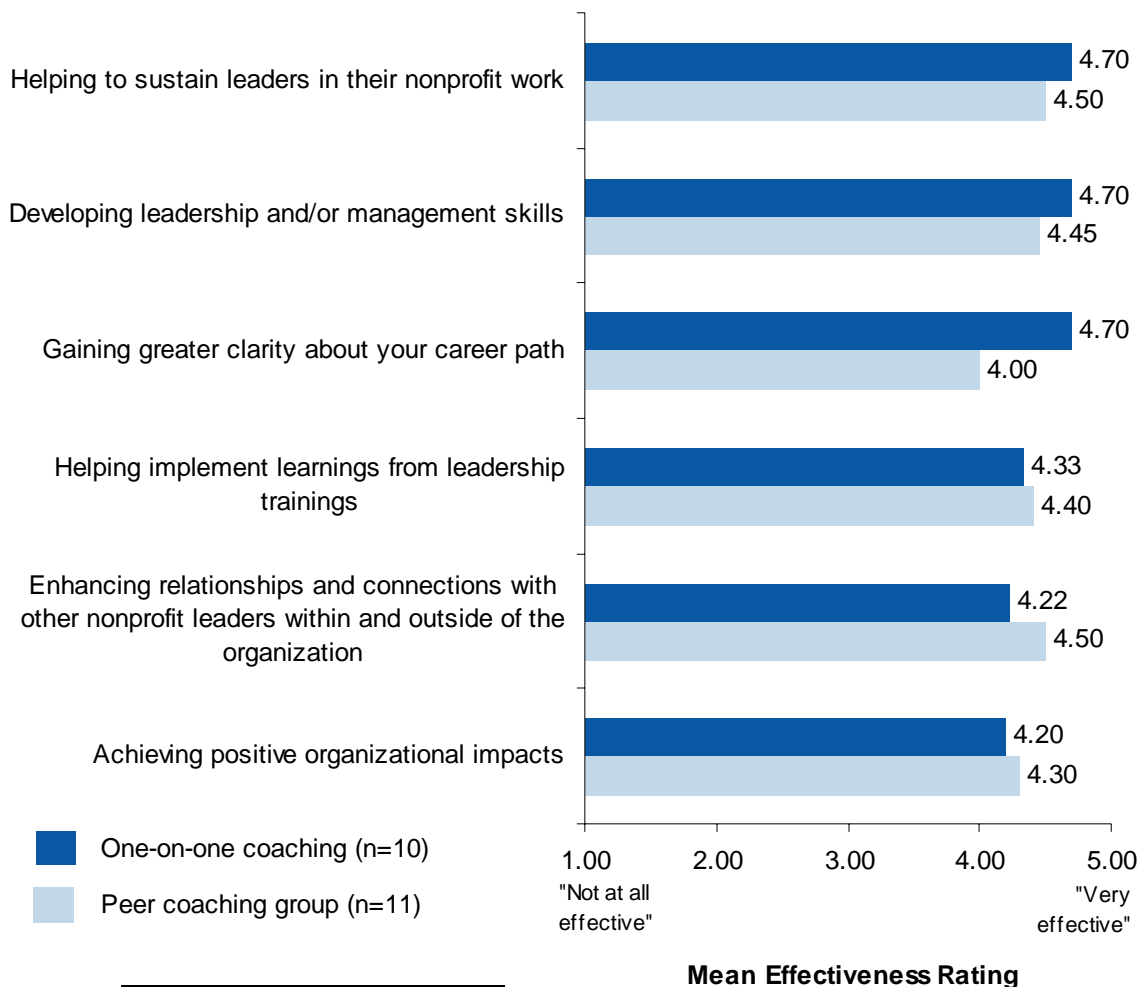
—Peer coaching group participant

track, yet still allowed the peers to take control of their group and utilize coaching skills with each other. They note the importance of the group needing room to develop its own dynamic and rhythm; if the group does not develop a sense of cohesion and commitment to each other, it compromises its value. This was a challenge for groups in which all participants did not attend on a regular basis. Participants also appreciate how facilitators are well connected to pertinent information and people in the field and shared these resources with participants.

EFFECTIVENESS OF COACHING

Overall, participants report that the one-on-one coaching and peer coaching groups were “moderate” to “very” effective methods for contributing to improvements in a variety of different areas. Coaching is most effective in contributing to impacts as shown in Exhibit 6 and described in the following pages.

Exhibit 6
Extent to Which Participants Found the Coaching Supports Effective in Contributing to Improvements⁶



⁶ The number of people responding to each variable may vary since participants were given the option to mark “don't know or not applicable.”

With one-on-one coaching I was able to develop my own voice and feel more empowered to be in a leading role amongst my peers and organizational staff.

—One-on-one coaching participant

By developing and practicing coaching skills with other leaders, I was able to bring those skills to my organization and put them into practice with my peers and our general staff.

—Peer coaching group participant

Participants learn how to develop approaches and systems to sustain their work in the nonprofit field. Through both types of coaching, participants learn self-preservation techniques that help them become more aware of their leadership needs. Participants develop methods to concentrate on self preservation, but remain driven to reach their professional goals. They report improvements in their delegation and training skills, as well as their ability to manage time and prioritize their work load. For example, one participant notes that her one-on-one coaching affirmed the types of challenges that she faces in her role and “rekindled her passion for the work.”

Participants report a new level of self awareness and confidence in their leadership and management skills. They are more aware of their leadership style, professional strengths and areas for improvement. This new awareness paves the way for participants to build confidence about their strengths and take action to improve their weaker areas. Both coaching supports prompt participants to test their assumptions, develop their own leadership voice (e.g., embrace cultural leadership) and become a more empowered leader. For example, one participant notes that her staff and supervisor both acknowledged that she more effectively articulates her ideas since participating in the one-on-one coaching.

Participants bring new coaching techniques and resources back to their organization. During the peer coaching groups, participants develop and practice coaching skills. Through this regular process they become more skilled at listening, giving advice and supporting their colleagues. One-on-one participants also begin to understand how coaching works and bring coaching techniques and tools back to their organization. For example, one participant utilized resources at a team retreat and during staff reviews; another participant plans to utilize the peer coaching group question guide with her staff.

Participants utilize coaching to gain greater clarity about their career path and goals. As participants acquire new skills and develop into more effective leaders, it is natural that they will want greater professional responsibility. They utilize coaching to explore their possible career dreams and paths. Although the subject of career paths comes up in both types of coaching, the one-on-one environment lends itself to more focused attention on a person’s career goals. Coaching prompts participants to ask themselves important questions, such as:

- **Am I making the change I want to see in the world?** Participants examine their personal purpose and vision and assess whether they are currently employed at an organization where they can pursue their goals. Sometimes this self-assessment reaffirms their decision to stay at a particular organization, while other times coaching supports participants as they think about pursuing other career options.

I really felt that the peer group coaching was more like a sisterhood. We all respected each other, were very supportive and very connected to each other.

—Peer coaching group participant

Education is not tangible until it is applied. I had the opportunity to apply the knowledge gained from my peer group during a crazy year at my organization.

—Peer coaching group participant

- **How can I overcome a major challenge at my organization so I feel comfortable staying?** Some participants report that they were on the verge of quitting their job as they began their coaching. They perceived organizational issues (e.g., tense relations with colleagues, no opportunities for growth) as insurmountable challenges. Through the coaching, especially the peer groups, participants received validation and support about how to address these issues and stay at their organization.
- **What are my long-term career goals?** Coaching helps participants identify a career path by setting goals and preparing the participant to take concrete steps towards the goal (e.g., listing professional accomplishments, creating a résumé for an ideal job situation).
- **Have I done all that I can at this organization?** For example, one participant felt that she had taken the organization as far as she could and wanted to pursue other career goals. She looked to her one-on-one coach to help her create a succession plan and prepare to leave the organization in a responsible manner.

Participants are expanding and enhancing relationships both within and beyond their organization. Both types of coaching help participants become better communicators and listeners, which positively influences participants' relationships with their colleagues (e.g., supervisors, direct reports). Through the peer coaching groups, participants also expand their support network, which allows them to call on peers for support, validation or advice. In both one-on-one coaching and peer coaching groups, participants are encouraged to get out of their comfort zone and network with other nonprofit leaders. For example, one participant notes that the one-on-one coaching provided her with communication strategies to support her networking efforts.

Although TCLI's pilot coaching project prominently focuses on individual leadership needs, some participants note that they are in a better position to help their organization achieve impacts. Participants report that they are more focused and organized, and as a result, they have become more productive and effective in their work. Other participants note that they have started using new approaches, tools or skills in their workplace, which has enhanced their ability to work to their full potential.

Participants are better equipped to handle organizational challenges. Both types of coaching offer participants a chance to talk about "real" issues that are happening at the organization and provide leaders with support and tools to handle challenges and crisis in a timely way. Through coaching, participants are more empowered and confident in their leadership ability to handle complex situations and take on greater responsibility. They feel more comfortable "stepping up to the plate" in their leadership positions and know they have the skills to provide the needed leadership in the midst of an organizational crisis.

REFLECTIONS & CONSIDERATIONS

TCLI's pilot coaching project offers a chance to gauge the value and effectiveness of a type of support that is relatively uncommon in the nonprofit sector, especially among emerging leaders. While very exploratory in nature, the evaluation identifies numerous ways in which participants benefit from one-on-one coaching and/or peer coaching groups, ranging from increased confidence to improved collegial relationships to strengthened peer networks. The personalized and tailored nature of both types of coaching supports complements leadership training by helping participants "do" what they reflected on and learned about in the more didactic training sessions. It also helps them to identify and address other related leadership and professional development issues of importance (e.g., challenging supervisory relationships, organizational challenges, time management and prioritization).

Below we offer some key reflections and considerations based on this pilot project, including participant readiness for coaching; opportunities to leverage coaching when it is connected to other types of leadership development supports; and the coaching project model itself. We base these thoughts on both the successes and challenges identified and advice given by participants, one-on-one coaches and facilitators as part of the evaluation as well as our broader experience assessing and evaluating nonprofit leadership supports.

Readiness for coaching

Participants are not always ready to fully engage in the coaching process. In hindsight, they advise other potential participants to prepare themselves prior to engaging in coaching. For example, they suggest that participants proactively identify what they want to get out of the coaching, create a plan before starting, prepare themselves to dive into difficult questions and prepare to be challenged. At the end of the coaching program, it is also important for peer coaching group facilitators and one-on-one coaches to talk to and prepare participants about how to continue their learning and growth on their own and/or informally through peers groups.

Considerations:

- Streamline the application process and ensure that people are fully committed to participation.
- Provide participants with an overview of coaching before they apply for the program. Make sure that they understand what one-on-one coaching and peer coaching groups are and how they differ from other supports such as therapy or consulting.
- Describe the typical coaching process and articulate what participants need to know to fully engage in the process. Set upfront expectations

about commitment to the process including estimated time needed for coaching sessions and inter-session work.

- Enhance participants' knowledge about the value of coaching by making the costs of coaching more transparent (e.g., monthly invoice to fellows that indicates the market rate for coaching and notes the pro bono nature of coaching services provided).
- At the end of the coaching, hold a formal close out session to acknowledge learning and growth, as well as to prepare participants to continue to work on their issues on their own (e.g., explain next steps, help with thoughts about "how to go about it on you own") or as informal groups (in the case of peer coaching groups).

Some participants had difficulties scheduling meetings and making time for coaching. They note the importance of protecting time and space to prepare for and participate in coaching sessions. This was particularly important for peer coaching sessions, where lack of full group preparation and participation negatively impacted everyone. The fact that participants were spread out across time zones makes it more difficult to schedule calls that work for peer coaching group participants; those receiving one-on-one coaching had some difficulties scheduling sessions, but one-on-one coaching can usually accommodate more flexible scheduling.

Considerations:

- Try to form peer coaching groups with people from different geographic areas to ensure confidentiality, but within the same time zone. Have participants pre-commit to certain dates or general time slots (e.g., third Monday afternoon of the month) when they apply to the program.
- Start the coaching program in the fall or spring when sessions are not as likely to conflict with vacations and holidays.

Opportunities to Use Coaching to Leverage Other Leadership Development Supports

TCLI alumni who have recently completed their leadership training appear more ready to engage in leadership development. Immediately after a leadership training, participants return to their organizations and are ready to implement new skills and approaches; however, often they approach barriers and have questions. This is an opportune time to provide supplemental coaching supports to help them enhance learnings from leadership programs, such as those offered by TCLI. One-on-one coaches suggest that they could more effectively leverage participants' previous leadership trainings if they have a better understanding of the content of the training, including the commonly used leadership development terminology.

Considerations:

- Contemplate the sequencing of leadership development supports so that coaching is available to participants during or soon after they have completed a training.
- Suggest that participants re-visit action plans, work plans or 360 assessments that they completed through previous leadership trainings to inform their coaching goals. Although these goals may change or may not be relevant during the coaching sessions, it could provide a good jumping off point for participants to think about ways to strengthen their learnings and prepare for the coaching sessions.
- Share training information (e.g., curriculum, list of topics, 360 assessments, work plans) as well as background on the program structure and timelines with coaches and facilitators.

Coaching model

Most participants do not make explicit connections between the one-on-one coaching and peer coaching groups. Although they derive tangible value from each type of coaching support, participants that receive both types of support do not seem to be explicitly integrating the supports (e.g., bringing a suggestion from the peer coaching group to a one-on-one coach) and experiencing multiplicative impacts.⁷ Both one-on-one coaches and peer coaching group facilitators note that participants usually brought up the fact that they were involved in another coaching support in passing; however, they advise that any time supports can be aligned, participants will likely derive greater benefits.

Considerations:

- Given the significant range in costs for coaching (see side bar on page 4), time constraints of participants and their varying needs, consider sequencing coaching supports so that leadership development participants begin with access to peer coaching groups. During peer coaching groups, participants and facilitators could identify a smaller group of participants who are addressing issues that might need further, deeper support from a one-on-one coach. They would also be able to assess their readiness to engage in this type of support more effectively.

⁷ It is important to remember that the numbers of individuals in the evaluation that received both types of support is particularly small.

CONCLUSION

Overall, TCLI's pilot coaching project can be considered a success as participants from both the one-on-one coaching and peer coaching groups experienced important benefits and made improvements in their leadership. This is especially noteworthy given the relatively small amount of resources and short time frame of the intervention. If TCLI wants to continue to provide coaching, either as a separate project or as a supplemental support to other leadership trainings, we recommend that staff consider ways to further strengthen the coaching supports based on the considerations noted above. Since this evaluation was very exploratory and based on a small number of individuals, it will be important to see if future efforts identify additional ways to strengthen the coaching project model and use resources most effectively. Given the infrequent use of this type of support, along with the need for the nonprofit sector to determine more effective ways to cultivate the next generation of nonprofit leaders, especially leaders of color, it will also be important to continue to share these learnings with others who support and work in the nonprofit sector.

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For more information about this evaluation, please contact Kim Ammann Howard at 510-665-6100 or kahoward@btw.informingchange.com. For more information and resources about coaching in the nonprofit sector, please visit the CAP Project's Online Toolkit at www.compasspoint.org/coaching.