

Executive Coaching Project:

Evaluation of Findings

STUDY CONDUCTED BY
Harder+Company
Community Research

For



In partnership with
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September, 2003

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EXECUTIVE SUMMARY

INTRODUCTION

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. The Executive Coaching Project represented one support strategy suggested in the two aforementioned studies. 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 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 three or fewer years. In addition to individual coaching services, EDs were permitted to use up to ten of their coaching hours for use with senior staff and Board of Directors members. EDs also participated in three peer learning roundtables to enrich their coaching experience and to establish an ongoing connection with other EDs participating in the coaching project.

The project structure and process were as follows:

- **Selection of Project Coaches.** Twelve coaches were selected out of a pool of thirty-six applicants. The project partners aimed for diversity in race/ethnicity, training background, and experience.
- **Selection of EDs.** ED participants were selected into the project based on the following profile: the individual had less than four years of experience as an executive director; they had no prior experience of coaching but understood the basic distinctions of coaching; they agreed to report on their progress and experience as a part of the evaluation.
- **Pairing of EDs with Coaches.** Two to three coaches were referred to each ED participant, based on information collected in the participant applications and an interview. Additional referrals were made from the pool of coaches for EDs that did not select a coach from the first group referred to them.
- **Learning Contracts and Coaching Logs.** The key issues, goals, and indicators of progress were determined by each participant with their coach within 'learning contracts', which were developed in the beginning of coaching and updated throughout the course of coaching. Each coach maintained brief records of each coaching session to document the key themes that were actually discussed, the insights, learning and challenges that emerged in the coaching.
- **Peer Learning Roundtables.** CompassPoint organized three four-hour roundtables for the participating EDs, each with a structured learning component (e.g., presentations) and some time for networking over an extended lunch. The EDs also discussed key issues they were addressing through coaching and shared successes.

METHODS AND PARTICIPANTS

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 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.

OUTCOMES OF COACHING

The outcomes of the coaching provided to the twenty-four participating EDs were many and varied. The coaching had an impact in six main areas. A summary of the results for each area is presented below.

Impact on Leadership, Management, and Technical Skills. Overall, EDs reported significant improvements between the baseline and final post-test surveys regarding their relationships and communication with staff and their leadership abilities. Interviews revealed that communication with Boards of Directors also improved for some EDs. Further, EDs described an enhanced ability to move the organization toward fulfilling its vision and mission. Regarding technical skills, EDs described instances where their coaches assisted them with strategic planning and fund development, which in turn benefited the organization.

Impact on Organization. On their surveys, EDs reported statistically significant improvement in the clarity of their vision for the organization, as well as staff and Board alignment with the mission. Further, they reported statistically significant improvements in organizational processes and structure, such as policies and procedures and decision-making processes. 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. Overall, in their interviews, many EDs reported that their organizations "work better" since coaching began.

Impact on ED Attitudes and Beliefs. EDs reported a statistically significant increase in their level of agreement with the statement "My work positively challenges me" between the baseline and final post-test surveys. In addition, in interviews, many EDs reported an increased sense of confidence in their abilities as a leader and manager as a result of coaching.

Impact on EDs' Personal Lives. Several EDs prioritized creating a better balance between their personal and professional lives by focusing more on their lives outside of work. 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 impacts on their personal lives, such as increasing physical exercise, finding new creative outlets, and improving relationships with friends and family.

Impact on ED Job Satisfaction. There were no statistically significant changes over time in the level of job stress and burnout reported on surveys. However, in interviews, several EDs reported that coaching helped to reduce stress and burnout, by encouraging EDs 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.

Impact on ED Tenure and Turnover. 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.
- 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.

According to ED interviewees, much of what they learned through coaching will be sustainable even in the absence of a coach, such as confidence in one's abilities. One of the practices that will be challenging to find a substitute for is the regular check-ins with a coach that helped them move toward their goals.

OVERALL SATISFACTION WITH THE EXECUTIVE COACHING PROJECT

The vast majority of EDs agreed that their coaching experience 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." A few EDs were less than completely satisfied with their coaching experience, which they attributed to various factors, including lack of experience on the part of the coach in a particular area and a poor fit between ED and coach. Despite some areas of dissatisfaction, all EDs reported getting some benefit from coaching. Overall, EDs reported being satisfied with the administration of the project. They noted a few areas for improvement, including refining the coach selection process, streamlining communications, and shifting the focus of the roundtables.

DISCUSSION AND RECOMMENDATIONS

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. Several EDs 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.

Some conclusions that can be drawn from the evaluation findings include:

- Coaching appears to have an influence on some EDs regarding their tenure.
- The magnitude of improvement in many areas was greater during the first six months of coaching compared with the second six months. Interpreting this finding to mean that coaching should only be offered for six months is an oversimplification, as after the first six months may be the critical period for deepening the learning and creating sustainable practices, even if improvement is occurring on a slower trajectory.
- Two areas explored in the evaluation seemed to have been little impacted in aggregate by the coaching experience: 1) perceived levels of job stress, and 2) ED relationships with their Boards of Directors. Job stress is influenced by so many factors, such as the prolonged economic downturn, that it is challenging for coaching to impact them all. And some stress is good, such as the stress of trying out new behaviors learned in coaching. Establishing and maintaining good Board relations is a major challenge for even the most experienced ED. In the absence of direct coaching with the Board, which was rare in this project, it is particularly tricky for newer EDs to impact relations with their bosses.
- In the areas where coaching was successful, one contributing factor that was not explicitly mentioned by EDs was ED dedication to the process and outcomes of coaching (e.g., taking time for coaching appointments, conscientiously working on exercises between meetings as instructed by their coaches).
- For some coachees, their learning may have been enhanced by the opportunities the three ED roundtables provided for hearing about the coaching experiences of other project participants.

By empowering EDs and their organizations, coaching appears to contribute to changing nonprofit culture. 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 following are some of the key recommendations for future coaching projects based on the findings from this evaluation:

- Develop a thorough and clear orientation to coaching and coach selection processes to ensure that EDs are fully informed about their options as well as criteria to consider in choosing a coach.

- Support EDs in developing realistic expectations about what can be accomplished through coaching.
- During coach selection, consider that newer EDs may have unique needs, which may include the need to develop particular technical skills (e.g., fund development, strategic planning). Establish protocols for coaches at the outset regarding how and when coaches should move to a more tutorial role to help EDs develop such skills in the context of coaching.
- Ensure that coaches assess individual ED needs at the beginning of the project and throughout, adjusting the coaching along the way. Coaches and project administrators should take note of “turning points” during coaching (which may occur around the six-month mark) that may indicate a need to shift the focus from developing skills and approaches to sustaining them.
- When possible, include chances for peer networking among coaching participants in order to reinforce and enlarge the coaching outcomes. Periodic coachee convocations can also be an opportunity for the project administrators to get feedback important to improving the service.

ACKNOWLEDGEMENTS

This exploratory pilot project required the varied resources of a number of Bay Area organizations and nonprofit professionals.

Of critical importance is the funding support from two forward-looking foundations, the Richard and Rhoda Goldman Fund and the Evelyn & Walter Haas, JR. Fund. Both have long track records of supporting innovations in the nonprofit sector. We greatly appreciate their underwriting this new tool for community executives.

The first program manager was Amari Vorwerk, CompassPoint staff consultant, whose verve and passion for service set a tone that still permeates the CompassPoint's coaching services. When Amari left to become a new executive herself, Steve Lew, an accomplished leader of pioneering community nonprofits and current CompassPoint consultant, picked up management duties.

Our two organizational collaborators were Marin Nexus and the Resource Center for Nonprofits of the Volunteer Center of Sonoma County. They were represented on the start-up management team by Ellen Draper and Jonathon Wilson, who devoted many hours to setting up the program and recruiting participants from throughout the San Francisco Bay Area. When they left their positions, they were succeeded by Janet Wentworth and Eileen Cronin respectively.

The wisdom and experience of the coaching advisory committee were essential to establishing correct protocols. Members were: Donna Abell, Lisa Berg, and Rich Snowdon. We are grateful to each of them, as well as John Bouffard, for many volunteer hours leading to a successful project design. Rich Snowdon in particular deserves the title of "project champion" for his clear vision for the program and his passion for bringing out the best in everyone.

Our very able and spirited external evaluator, and the author of this report, was Dara Coan of Harder+ Company Community Research. Dara gave endless hours to creating, distributing, and retrieving the evaluation instruments, attending the participant roundtables, and conducting interviews.

We give special thanks to our multi-talented executive coaches for innovating with us, tolerating our bureaucracy, and serving at reduced rates. They are invaluable assets for anyone seeking to enhance their skills and effectiveness.

And, finally, our highest appreciation must go to the nonprofit executive directors who were at the heart of this endeavor. They showed themselves to be wise community leaders in seeking new skills and perspectives and in having the courage to try out this little known modality, executive coaching.

*Tim Wolfred, Director
Executive Leadership Services
CompassPoint Nonprofit Services*

INTRODUCTION

BACKGROUND

The Executive Coaching Project was inspired by two studies conducted by CompassPoint Nonprofit Services, a nonprofit training, consulting, and research organization with offices in San Francisco and Silicon Valley. “Leadership Lost: A Study on Executive Director Tenure and Experience” was conducted in 1999 with a small sample of San Francisco Bay Area Executive Directors. A second study, “Daring to Lead: Nonprofit Executive Directors and Their Work Experience,” sought to explore the issues identified in the “Leadership Lost” study on a national scale. This study was implemented in the fall of 2001 and included more than 1,000 nonprofit leaders from around the country. The findings from these studies underscored the need to develop various strategies for supporting and retaining leadership talent in the nonprofit sector.¹

PROJECT DESCRIPTION

The Executive Coaching Project represented one support strategy suggested in the two aforementioned studies. 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 provided twelve months of one-on-one coaching to 24 executive directors (EDs), from November 1, 2001 through November 30, 2002. In addition to individual coaching services, EDs participated in three peer learning roundtables to enrich their coaching experience and to establish an ongoing connection with other EDs participating in the coaching project. Of the 40 hours of coaching made available to each ED, 10 of the coaching hours were available for use with senior staff and Board of Directors leaders at the discretion of the ED. About half of the group used this option to introduce coaching into their organizations.

Project Structure and Process

Selection of Project Coaches. Twelve coaches were selected out of a pool of thirty-six applicants. The project partners aimed for racial/ethnic diversity as well as diversity in the training backgrounds of coaches (i.e., the partners sought to include coaches trained in the various approaches represented at the training institutes certified by the International Coaches Federation). The project partners also attempted to ensure that a variety of experiences were represented in the coach pool, including prior experience in the nonprofit sector and experience as a former executive or senior staff or Board member. The selected coaches were paid \$90 per hour for their services.

Selection of EDs. ED participants were selected into the project based on the following profile: the individuals had less than four years of experience as an ED; they had no prior experience with coaching but understood the basic distinctions of coaching; they agreed to report on their progress and experience as a part of the evaluation. Additionally, a diverse demographic sample of EDs was sought in order to reflect the nonprofit sector leadership in the San Francisco Bay Area. An explicit financial and time commitment for the coaching was also determined. Participant fees ranging from \$1,500 to \$3,500

¹ Reports on the findings of both studies can be found at: <http://search.compasspoint.org/bookstore>

(based on budget size) were required, and this was paid in part by the individual and in part by their organization.

Pairing of EDs with Coaches. Two to three coaches were referred to each ED participant, based on information collected in the participant applications and an interview. Profiles of each coach and guidelines on selecting a coach were provided. Participants were encouraged to interview each coach candidate and to rank their preference based on these interviews. Additional referrals were made from the pool of coaches for EDs that did not select a coach from the first group referred to them.

Learning Contracts and Coaching Logs. The key issues, goals, and indicators of progress were determined by each participant with their coach within “learning contracts,” which were developed in the beginning of coaching and updated throughout the course of coaching. Each coach maintained brief records of each coaching session to document the key themes that were actually discussed, as well as the insights, learning, and challenges that emerged in the coaching. Both documents were reviewed retrospectively to summarize the coaching experience, and to mark the progress towards each ED’s goals.

Peer Learning Roundtables. CompassPoint organized three four-hour roundtables for the participating EDs, each with a structured learning component and some time for networking over an extended lunch. Structured learning involved presentations by coaches and group discussions focused on the basic foundation of coaching within organizations and ways to maximize the coaching experience. The EDs also discussed key issues they were addressing through coaching and shared successes. While a large percentage of EDs participated in the first session, the attendance at these meetings dropped to 72% in the second session and to 50% by the third session.

Characteristics of Executive Director Participants

Twenty-five EDs were selected to participate in the project from throughout the San Francisco Bay Area, and twenty-four EDs completed their coaching. Characteristics of participants and their organizations are presented in Exhibit 1. Most participants had been EDs for less than three years and held positions at small human services agencies in San Francisco, although EDs from other types of agencies and other locations in the Bay Area also participated. Nineteen EDs were white, and six were people of color. Fifteen EDs were male, and ten were female.

Characteristics of Project Coaches

Project coaches 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.

Exhibit 1: Characteristics of Participating Executive Directors and Their Organizations

Length of ED			
Tenure=	n=	%=	=
1 year or less=	10=	42=	=
2 years or less=	7=	29=	=
3 years or less=	5=	21=	=
More than 3 years=	2=	8=	=
Total=	24=	100=	=
=	=	=	=
=	=	=	=

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

County of Organization=			
County of Organization=	n=	%=	=
Alameda=	2=	8=	=
Marin=	2=	8=	=
San Francisco=	13=	54=	=
San Mateo=	2=	8=	=
Sonoma=	5=	21=	=
Total=	24=	100=	=

Agency Budget=			
Agency Budget=	n=	%=	=
Less than \$500K=	9=	38=	=
\$500K - \$1 million=	8=	33=	=
\$1 million to \$3 million=	4=	17=	=
>\$3 million=	3=	13=	=
Total=	24=	100=	=

ED Race/ Ethnicity=			
ED Race/ Ethnicity=	n=	%=	=
African American=	1=	4=	=
Asian/PI=	3=	13=	=
Latino/a=	2=	8=	=
White=	18=	75=	=
Total=	24=	100=	=

ED Gender=			
ED Gender=	n=	%=	=
Female=	15=	63=	=
Male=	9=	37=	=
Total=	24=	100=	=

PROJECT EVALUATION

The evaluation of the Executive Coaching Project was conducted by Harder+Company Community Research, an independent social research firm. The purpose of the evaluation was to identify the areas where coaching had an impact (outcome evaluation) and how coaching contributed to those impacts (process evaluation).

The evaluation findings will prove useful for several audiences:

- Executive Directors (EDs) interested in being coached will gain a better sense of what a coaching experience entails.
- Nonprofit technical assistance/capacity-building organizations that wish to develop similar coaching projects will find the evaluation findings informative.
- Funders wanting to support similar coaching projects will be informed about the impacts that coaching can achieve.
- Senior staff, managers, and Boards of Directors looking to incorporate coaching into their organizations will find answers to how coaching might impact their organizations.

This report presents the evaluation methods, the results, and a discussion of the implications.

METHODS AND PARTICIPANTS

The evaluation used a mixed methods approach (i.e., both quantitative and qualitative methods) and relied on both primary and secondary data. The design included a survey completed by the participating EDs, semi-structured interviews with EDs, and case studies of five EDs. Below is a description of the three methods used for the evaluation. All evaluation instruments appear in Appendices 1 through 5.

SURVEYS

EDs completed a self-administered email survey at three points in time: upon entry into the program (baseline), at six months (midpoint post-test), and upon completion of their coaching hours (final post-test). The survey consisted mostly of closed-ended questions that asked EDs to self-assess their confidence and abilities in several areas, including leadership skills, management skills, and ability to maintain good relationships with their staff and Board of Directors.

Twenty-five EDs began the coaching program, and twenty-four EDs completed the program. All twenty-five EDs responded to the baseline survey, most between October 2001 and February 2002. One ED left the program shortly after completing the baseline survey and thus was excluded from the analysis. All twenty-four final participants completed the midpoint survey between March and August 2002. Twenty-three participants completed the final survey between September 2002 and February 2003. (Three EDs joined the program late and completed their surveys later than the others, and thus it took six months for all EDs to complete their midpoint and final post-tests.)

INTERVIEWS

As each ED finished his or her coaching hours, Harder+Company contacted him or her for an in-depth semi-structured telephone interview. The questions focused on describing the benefits and challenges related to coaching, accomplishments that resulted from coaching, overall satisfaction with coaching as well as with CompassPoint's administration of the project, and recommendations for improvement. Interviews were conducted after EDs submitted their final post-test email survey to prevent the interview from biasing their survey responses.

Interviews were conducted with twenty EDs between October 2002 and February 2003. To ensure a good response rate, all EDs were contacted by telephone or email at least five times to schedule an appointment. Four EDs did not participate due to inability to schedule the appointment.

CASE STUDIES

Five EDs agreed to participate 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. Each case study consisted of:

- Observation of a coaching session at the beginning of the project

- An extended interview with the ED upon completion of coaching (i.e., questions were added to the regular ED interview)
- Interviews with one staff and/or one Board member at the ED's organization upon the ED's completion of coaching
- Review of the ED's learning contract and coaching logs

Board and staff members to be interviewed were chosen by the ED. In some cases, EDs elected not to have the evaluator interview a Board or staff member because they did not believe they could select anyone who would be able to comment on their progress during the coaching experience; therefore, not all case studies draw upon the perspectives of Board and staff.

OTHER EVALUATION ACTIVITIES

In addition to the survey, interviews, and case studies, Harder+Company provided regular feedback to CompassPoint based on interim evaluation findings. For example, a Harder+Company representative attended the three ED roundtables held during the project and debriefed with CompassPoint after each session.

STRENGTHS AND LIMITATIONS

The evaluation design's strengths include the following:

- The sample size for the ED interviews was adequate, which allowed for both describing a range of ED experiences as well as identifying commonalities among experiences.
- The case studies helped to illustrate the process and outcomes of coaching in a way that reflects the lived experience of the EDs.
- The quantitative survey helped to illustrate, in concrete terms, the possible outcomes of coaching at the individual and organizational levels.

Limitations include the following:

- Although nearly all EDs participated in the email survey, the sample size may have been too small to detect impacts in some areas.
- Four EDs did not participate in the final interview, and they may have been different in some important ways from those who did participate (e.g., they may have been less satisfied with their experience); therefore, the interview findings do not necessarily represent the experience of all EDs.
- The evaluation did not include a longitudinal component to assess whether EDs who participated in coaching remained at their jobs or within the nonprofit sector longer as a result of coaching.

OVERVIEW OF COACHING

WHAT IS EXECUTIVE COACHING?

The Executive Coaching Project defined coaching as a process of supporting individuals to make more conscious decisions about their professional and personal lives. Executive coaches assist EDs in learning about themselves, their interpersonal relationships, and their styles of learning, leading, managing people, making decisions, and managing conflict. Coaching is a process for individuals to identify what's important in personal and organizational values and to be more successful in acting on what's important. Coaching is a developmental process based on identifying and building on the individual's strengths and internal resources.

Through a series of sessions with a professional coach, individuals identify goals, barriers to success, and action strategies to help them achieve their goals. The coach supports the individual in staying committed to priorities she or he says are important. Coaches ask good questions that support learning and solutions from the ED and provide supportive reinforcement to put new insights into practice.

EXECUTIVE DIRECTOR PERSPECTIVES ON COACHING

The 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 group discussion after the evaluation findings were presented to the participating EDs 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.

Particular facets of the Executive Coaching Project that EDs described as beneficial include its affordability (i.e., CompassPoint subsidized the cost), accessibility (i.e., CompassPoint, a well-known agency, offered coaching as a structured service), and the peer support available because multiple EDs participated simultaneously.

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.

WHAT AREAS DID EXECUTIVE DIRECTORS ADDRESS THROUGH COACHING?

Coaching can be helpful to EDs in a number of areas, and the coaching process is tailored to help EDs meet goals and objectives that they define for themselves. Early in their relationship, EDs and their coaches designed individual learning contracts. These contracts delineated the goals that each ED expected to achieve as a result of participating in the coaching process. Thus the contracts acted as a yardstick for the ED's success as well as suggested a roadmap for individual coaching sessions. Each contract consisted of three sections: goals, progress indicators, and additional resources. The content of the contracts reflects the unique struggles and aspirations of each participating ED. Nevertheless, common themes surface throughout the contracts. The following analysis summarizes the main themes from the learning contracts developed at the beginning of coaching.² Although these themes tended to remain important throughout coaching, priorities and goals for individual EDs shifted throughout their coaching experiences.

Personal Development. Among the numerous and diverse goals mentioned in the learning contracts, the desire to develop personally was most frequently mentioned. Personal goals ranged from maintaining balance between professional and private pursuits to cultivating desired qualities. The following is a list of these personal goals, in order from most to least prevalent, with the number of EDs identifying each goal listed in parentheses:

- Balance personal life/work (8)
- Increase confidence (6)
- Exercise more/join a gym (5)
- Reduce job stress (5)
- Exercise more authority, be more assertive (3)
- Develop creative outlets (2)
- Increase self-knowledge (2)
- Develop greater discipline (1)
- Ease perfectionism (1)
- Limit working hours (1)
- Save money for retirement (1)

² Seventeen learning contracts were reviewed for this analysis.

Managing Staff. Following personal goals, EDs were most concerned with improving their ability to manage staff. Again, this theme took on different subtexts for each ED. While some EDs were focused on becoming better mentors, others were more interested in making systemic changes to staffing structures. The most salient staff-related goals are highlighted below:

- Become an effective mentor to staff (8)
- Delegate better (5)
- Reconfigure staffing, improve hiring (5)
- Inspire a new work ethic, a more motivated staff (3)
- Enhance interpersonal relationships with staff (3)
- Develop an interim/succession plan, in case of replacement (2)
- Provide ergonomic workstations for staff (2)

Leadership Skills. Developing leadership skills was another priority area for EDs. Some EDs articulated specific leadership skills they hoped to improve and others focused on outcomes expected as a result of being more effective leaders. Leadership goals included:

- Develop/fulfill a vision for the organization (7)
- Develop a personal leadership style (4)
- Develop a level of influence outside my organization, in my field (4)
- Be vision driven, not task driven (3)
- Reframe my concept of leadership as something positive (1)
- Feel powerful and effective rather than authoritarian (1)

Organizational Development. EDs also took stock of the needs of their organizations and articulated concrete steps to address them. Due to the particularities among EDs' organizations, there was somewhat less thematic overlap in this area than in other areas. The predominant themes related to overall organizational development were:

- Develop/clarify roles for executive committee, board, trustees (6)
- Develop strategic plan (4)
- Develop action plan (3)
- Introduce new programs (2)
- Improve relationships with board members (1)
- Mobilize others to a clear vision for the organization (1)
- Establish by-laws (1)
- Conduct a client survey (1)
- Attend to building maintenance (1)
- Build a coalition with other agencies (1)
- Create a mission statement (1)
- Develop a PR plan (1)
- Improve technology (1)

Personal Organizational Skills. A number of EDs set out to improve their organizational skills. There was little variation among these goals, the two themes being:

- Improve time management skills (9)
- Be more organized (e.g., create a new filing system, clean desk) (6)

Financial Management. Finally, many EDs were concerned about the finances of their organizations. Financial management goals included the following:

- Increase board, staff and ED capacity to fundraise (3)
- Increase ED salary/establish ED salary (3)
- Ensure the financial security of the organization (2)
- Research new fundraising opportunities, diversify the funding base (2)
- Perform a cash flow analysis (1)
- Develop a strategic way to work with major donors (1)

Findings from the surveys and interviews suggest that EDs found coaching to be helpful in all of these areas and more (described later).

WHAT APPROACHES AND TECHNIQUES DO COACHES USE?

Coaches offer EDs an opportunity to define their own issues, goals, and solutions by framing challenging questions for EDs to reflect on. In her interview, one ED described her coach's approach:

A lot of what she did was figuring out and provoking me to come up with ideas. My coach would say something like, "Describe how you are feeling about the situation and come up with some different approaches." She encouraged me to have goals for our different meetings and encounters. She taught me to go into things with an outcome instead of going into and seeing what happens.

Other fundamental aspects of coaching include providing support and feedback and creating an accountability structure to ensure that EDs take action toward reaching their goals (e.g., some coaches assigned "homework" in between coaching sessions). Some coaches emphasize a more reflective, introspective approach to the process, using self-exploration exercises and other techniques; some coaches use structured activities that may involve staff, Board, or family participation; and some coaches use both approaches. Examples of specific exercises and activities used during this coaching project include:

- **ED Assessment Survey.** With at least three agencies, the coach administered a survey to the staff and/or Board of Directors to assess the ED's performance, strengths, and weaknesses. In one situation, the ED subsequently had an opportunity to meet with staff and discuss ways that they could work better together.
- **Employee Work Styles Inventory.** At one agency, staff were asked to complete a survey assessing their work styles, after which everyone met and discussed ways they could work together more effectively.
- **Family Performance Ratings.** One ED who works long hours had his wife complete a survey each week rating his performance as a husband (e.g., how much time he spent with her).

- **Meditation and Body Awareness Work.** Some EDs meditated as an anxiety reduction exercise, and others combined meditation with body awareness work as a mechanism for finding their “energy source.”
- **Reflective Writing/Journaling.** One ED described a form that her coach asked her to complete each week to identify challenges she faced and questions that she should ask herself.
- **Role-Playing.** Coaches frequently used role-playing exercises, such as 1) role-playing the “inner critic” to gain better self-awareness, and 2) practicing particular conversations (e.g., how to approach the Board to ask for increased time off).
- **Visualization.** Some coaches used visualization exercises to help EDs imagine how situations could be different.

SELECTING A COACH: IMPORTANT STEPS AND CRITERIA

In their final interviews, participating EDs defined several criteria that they believe are important to consider when selecting a coach. Most EDs found that the criteria they applied helped create a well-matched ED/coach pair.

Experience. Several EDs agreed that coaches with nonprofit backgrounds bring a useful perspective to the table and are perhaps better able to assist with specific technical skills (e.g., fundraising) than other coaches, although imparting technical skills is not a primary role for a coach. One ED remarked, “I think that it is probably important that the coaches have experience with being an ED. While my coach was very helpful in a lot of things and she has a lot of experience, I don’t think that she has ever been in the hot seat.”

EDs also found other types of backgrounds and experience beneficial. For example, some found that experience with nonprofit start-ups was helpful. Other EDs felt that topical experience (e.g., with particular target populations or issues) was important, but another did not think that “having similar backgrounds is a good criteria for matching.” Another ED found that her coach’s business background proved beneficial. She commented, “The background of my coach is in business and that was very helpful...we hired a PR firm and the coach was helpful in that. She was good at helping me look at the agency as a business.” In anticipation of these varying ED needs, the Executive Coaching Project sought to include nonprofit leadership experience and business management experience among the pool of coaches.

Personal Connection. EDs widely agreed that a strong personal connection is a critical component in a successful coaching relationship. One ED stated succinctly, “I guess it all came down to my relationship to my coach...she’s fabulous and I just adore her.”

Demographic Characteristics. A few EDs noted that having a coach with the same race/ethnicity or gender does not necessarily predict a good fit. One ED described her experience interviewing a coach she ultimately did not select: “[The coach] is Asian as am I, so I don’t know if [CompassPoint] chose that coach for me, culturally. For me it was a barrier. He was very structured...it felt to me that I would not be completely honest...” Another asserted that, for her, experience was more important than gender: “CompassPoint gave me two potentials to choose from—one was a man and the other one

a woman. I had no preference according to the sex of the coach. The man had been an ED before, and he started a nonprofit, and he really understood the job.” She selected the male coach who had the experience and background she was looking for.

Coaching Style and Approach. Several EDs found that having clarity on their preferred coaching style at the outset was helpful. For example, one ED sought a “hard-nosed [coach]...who could focus on the bottom line.” Another wanted a coach who “not only could encourage me and support me, but could also give me some new advice about how to proceed in challenging situations.”

Interview with the Coach. Many EDs asserted that having an interview or a sample coaching session before making a final selection was important for determining whether the coach is a good fit for their needs and expectations. One ED who ultimately was not completely satisfied with his coaching experience reflected on what he would have done differently:

In retrospect, I feel like I should have spent more time finding a better coach for myself. One thing that I learned that really matters [is] spending time at the beginning to make sure that it is a good match. ...[Now]...I would be better able to interview someone. I would know what I want and what my expectations are for the coach and that relationship.

OUTCOMES OF COACHING

OVERALL IMPACT OF COACHING

EDs widely agreed that their coaching experience 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.” The most common response was “very satisfied” and no one reported being “not at all satisfied” (Exhibit 2).

Exhibit 2: Satisfaction with Coaching

Rating=	n=	%=
“5” – Very satisfied=	15=	62.5%=
“4” – Somewhat satisfied=	4=	16.7%=
“3” – Neutral=	3=	12.5%=
Response missing=	2=	8.3%=
Total=	24=	100.0%

In interviews, EDs described the many reasons for their satisfaction. Satisfaction for some EDs was linked to the ongoing source of support that coaching provided. One ED proclaimed, “[Coaching] exceeded my expectations. I can’t even begin to say how helpful it was to have my coach there and to listen to all the things I’ve been going through.” 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.” One ED asserted that he “wouldn’t want to think about what the past year would have been like without 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:

- ED leadership, management, and technical skills
- Organizational structure and capacity
- ED attitudes and beliefs about themselves and their work
- Personal lives of EDs
- ED job satisfaction
- ED tenure

The results from the quantitative ED survey and the qualitative ED interviews, which are presented in this section, illustrate how these outcomes were achieved and how the outcomes are connected and

interrelated. It should be noted that other outcomes may have resulted from coaching that were not explored in this evaluation.

IMPACT ON LEADERSHIP, MANAGEMENT, AND TECHNICAL SKILLS

There were three main skills areas in which EDs noted the effects of coaching: leadership skills, management skills, and technical skills.

Leadership Skills

Overall, many EDs realized success in the development of leadership skills. On their surveys, EDs reported statistically significant improvement in their confidence in the following areas: ability to exercise leadership on a daily basis ($p=.01$),³ ability to exercise leadership in the face of challenges and obstacles ($p=.02$), and ability to move the organization toward achieving its goals ($p=.00$; Exhibit 3). Regarding confidence in ability to resolve conflicts within the organization, there was a trend toward improvement, although it was not statistically significant. A great deal of the improvement in the area of leadership skills occurred during the first six months of coaching (between the baseline and midpoint surveys), although EDs continued to demonstrate improvement in the final six months.

Exhibit 3: Changes in Leadership Skills

Leadership Skill=	Mean Level of Confidence at Baseline* =	Mean Level of Confidence at Final Post-test* =	p Value=
Ability to exercise leadership on a daily basis (n=23) [†] =	3.74=	4.22=	.01 [‡] =
Ability to exercise leadership in the face of challenges and obstacles (n=23) [†] =	3.74=	4.17=	.02 [‡] =
Ability to resolve conflicts within the organization (n=23) [†] :	3.61=	4.00=	.12 ^{ns} =
Ability to move the organization toward achieving its goals (n=22) [†] =	3.36=	4.05=	.00 [‡]

*On a scale of 1 to 5, where 1 = "not confident at all" and 5 = "very confident."

[†]Most of the reported increase in confidence occurred in the first six months (between baseline and mid-point surveys).

[‡]Statistically significant at the $p<.05$ level.

ns = not significant at the $p<.05$ level.

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. One ED asserted, "I think I'm bolder and I think I have a deeper understanding

³ In all survey tables, a p value is 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.

about what it means to lead, and I feel like I have a framework for structuring and running an organization and creating a vision and carrying it out.” Another described a change in her thinking processes that improved her leadership abilities. She explained, “I gained an ability to be more strategic in my thinking or approach to things, so that I would be able to actually start thinking and breaking down the steps to get...to a goal.”

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.”

The support and encouragement that coaching provides also helped some EDs with making the tough decisions that leaders often face. In her interview, one participant stated, “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.”

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.”

Management Skills

EDs noted improvement in three types of management skills as a result of coaching: 1) task completion and productivity, 2) personnel skills, and 3) relationships with staff and Board of Directors members (e.g., communication skills).

Task Completion and Productivity. On their surveys, EDs reported some improvement in their effectiveness in these areas (Exhibit 4). There was statistically significant improvement in their effectiveness at 1) ensuring that the Board of Directors completed high priority tasks ($p=.02$), 2) delegating tasks and responsibilities ($p=.00$), and 3) being productive with time at work ($p=.02$). There was also a trend toward improved effectiveness related to the ED completing high priority tasks and the staff completing high priority tasks, but the trend was not statistically significant. In all areas, much of the benefit was realized during the first six months of coaching (between the baseline and midpoint surveys), although, as with leadership skills, EDs continued to demonstrate improvement in the final six months.

Exhibit 4. Changes in Effectiveness Regarding Task Completion and Productivity

Management Skill=	Mean Level of Effectiveness at Baseline* =	Mean Level of Effectiveness at Final Post-test* =	p Value=
Completing high priority tasks in a timely manner (n=23) [†] =	3.91=	4.13=	.26 ^{ns} =
Ensuring that the Board completes high priority tasks in a timely manner (n=23)=	2.91=	3.35=	.02 [†] =
Ensuring that staff members complete high priority tasks in a timely manner (n=22) [†] =	3.86=	4.14=	.08 ^{ns} =
Being productive with time at work (n=23)=	3.61=	4.00=	.02 [†] =
Delegating tasks and responsibilities (n=24) [†] =	3.04=	3.83=	.00 [†]

*On a scale of 1 to 5, where 1 = "not at all effective" and 5 = "very effective."

[†]Most of the reported increase in effectiveness occurred in the first six months (between baseline and mid-point surveys).

[‡]Statistically significant at the p<.05 level.

ns = nonsignificant at the p<.05 level.

Interview comments helped elucidate how coaching assisted EDs in acquiring better delegation skills. One ED explained how coaching helped him learn "purposeful delegation," such that he had a solid rationale about why some things could be delegated and others could not. This allowed him to avoid delegating just to "get things off [his] plate." Another ED connected her increased delegation skills to improvements in the areas of easing perfectionism and creating a balance between her personal and professional life, which were two of her goals for her coaching experience.

Personnel Issues. Several EDs found coaching helpful in providing concrete strategies for dealing effectively with personnel issues, such as completing performance evaluations and letting staff go. In her interview, one ED described,

I had one [staff person] in particular whose productivity was low and who was challenging and negative towards me. ...I confronted her directly about her performance and we set up an evaluation of her progress. ...Coaching was a big part of it.

Coaching provided EDs with support during the process of confronting such issues. For example, one ED reported, "When I first started with my coaching, I was working to let go one of the administrative assistants. I really struggled with the whole process, and working it through with the coach made a huge difference..."

Not all EDs were satisfied with the coaching they received in this area. One ED, who felt overall that he and his coach were not the best match, remarked in his interview, “I was hoping to gain some skills in...dealing with conflicts and personalities [and] team-building. ...I didn’t really get those things out of it. [My coach] wasn’t helpful in doing that.” He attributed the lack of progress in this area to several factors, including challenges in finding a time and place to meet with his coach which impeded the development of a close working relationship, but he indicated that it was not due to the coach’s shortcomings (see John’s case study later in this report).

Relationships with Staff. On their surveys, EDs reported statistically significant increases in their level of agreement with a series of statements related to their relationships with staff (Exhibit 5). EDs reported working more effectively with staff ($p=.00$), having better relationships with staff ($p=.01$), and feeling more valued by staff ($p=.05$) at final post-test than they did at baseline. As revealed in the interviews, improvements in staff relations were often attributable to newly learned communication skills. One ED explained,

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. 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.

Exhibit 5: Changes in Relationships with Staff

Statement=	Mean Level of Agreement at Baseline*=	Mean Level of Agreement at Final Post-test*=	p Value=
Overall, I work effectively with my staff. (n=22)=	3.91=	4.50=	.00 [†] =
I have a good relationship with my managers and other staff that report to me. (n=22)=	4.09=	4.59=	.01 [†] =
I feel valued by my staff. (n=21) [†]	3.95=	4.43=	.05 [†]

*On a scale of 1 to 5, where 1 = “strongly disagree” and 5 = “strongly agree.”

[†]Most of the reported increase in level of agreement occurred in the first six months (between baseline and mid-point surveys).

[†]Statistically significant at the $p<.05$ level.

Relationship with Board of Directors. Although only one ED prioritized developing a better relationship with the Board in the learning contract, half of EDs ($n=12$) reported some degree of improvement on their surveys in one or more of the three areas related to relationship with the Board between baseline and final post-test. However, this change over time was not statistically significant (Exhibit 6). One possible reason for this finding is that the mean level of agreement with the statements was already high at baseline for two of the three items, thus leaving little room for improvement. Another possible reason may be that EDs altered their interactions with the Board in ways that were more empowering for the EDs but may have not been well-received by the Board, which in turn may have impacted the relationship neutrally or deleteriously. For example, in their interviews, a few EDs described increased assertiveness with and decreased acquiescence to the Board, and one of these EDs reported that it had a negative outcome.

Exhibit 6: Changes in Relationship with Board of Directors

Statement=	Mean Level of Agreement at Baseline* =	Mean Level of Agreement at Final Post-test* =	p Value=
Overall, I work effectively with the Board of Directors. (n=23) [†] =	3.65=	3.83=	.26 ^{ns} =
I have a good relationship with the Board of Directors. (n=24)=	4.22=	4.30=	.58 ^{ns} =
I feel valued by my Board of Directors. (n=21)=	4.10=	4.05=	.77 ^{ns} =

*On a scale of 1 to 5, where 1 = “strongly disagree” and 5 = “strongly agree.”

[†]Most of the reported increase in level of agreement occurred in the first six months (between baseline and mid-point surveys).

ns = not significant at the p<.05 level.

Four of the twelve EDs who reported improvements in their relationship with their Boards on their surveys described successes they had with their Boards during their coaching experience in their interviews. Some achievements were related to EDs changing the way they relate to the Board (e.g., being more honest, unlearning ineffective communication methods), and others were related to how the Board viewed the ED. For example, one ED expressed, “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.”

In addition, two EDs who did not report improvement in Board relations on their surveys described Board-related changes in their interviews that resulted from coaching. One ED learned Board development skills (e.g., Board recruitment) through coaching, and the other improved her relationship with the Board President through a meeting facilitated by her coach.

Finally, one ED revealed in his interview that attempts to improve his relationship with the Board were unsuccessful, despite his coach’s work with both himself and the Board. He said, “We tried to work on different ways around better relations with the Board and making them more accountable and making sure that they were responsible and them being aware of my needs and what I needed. That was an ongoing struggle. We tried several things that didn’t work.”

Technical Skills

Although coaching does not generally include training or assistance with technical skills, some of the Executive Coaching Project coaches had experience in particular technical areas that they shared with EDs. In a few cases, EDs hired their coaches as outside consultants, separate from the Executive Coaching Project, to work with them on specific skills.

The two most common areas where coaches shared technical expertise with the EDs were strategic planning and fundraising. A few EDs reported that their coaches helped them with human resources (e.g., hiring) and financial management (e.g., how to read financial documents).

Strategic Planning. In the area of strategic planning, the most common role for coaches was as facilitator. In the final interview, one ED recalled an exercise that the coach did with the staff during a strategic planning retreat that the coach led, which proved effective:

Usually when we talked about establishing a mission and vision we end up with no consensus. One exercise that was helpful was when we had to draw our concept of our vision and not to use words. We displayed the diagram and talked about it. And there was a consensus. Our vision was that women and children come into program with sad faces and leave with happy faces.

In another instance, the coach helped with the content of the strategic plan: “My coach helped consult with me on the strategic planning process. ...She reviewed the strategic plan and gave me guidance on what to do because it was one of her areas of expertise.”

Fund Development. Coaches also provided extensive assistance and support with fundraising, which, in at least two cases, helped save the organization from financial disaster (discussed further under Organizational Impact). In her interview, one ED described in depth how coaching altered her approach to fundraising. Her experience highlights how coaches with nonprofit experience can prove essential when tackling certain challenges:

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.”...He gave me tangible advice, resources, classes to take, people to call, consultants to use, books to read, and specific ideas and experiences..., like how to work with Board members on how to come up with names for donations.

Another ED reported in his interview that his coach helped him with his approach to grant writing, which had a direct impact on his organization’s ability to raise money. He asserted, “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, and basically, that’s just what I did, and before I knew it, we had grants coming in.”

Some EDs expected to receive more “content” assistance from their coaches on technical skills but did not find that type of assistance in the coaching approach. For example, one ED noted in his interview, “I didn’t have a strategic planning workshop to walk me through how to do it as I was doing it, which would be ideal, or as I was doing a strategic plan, having a coach to walk me through it would have been helpful.”

ORGANIZATIONAL IMPACT

Coaching affected EDs' organizations in four primary areas: mission and vision, organizational infrastructure, financial stability, and organizational effectiveness.

Mission and Vision

On their surveys, EDs reported statistically significant increases in agreement with the following statements: "The staff, the Board, and I are aligned with the organization's mission statement" (p=.00); "I have a clearly defined vision for where the organization is headed" (p=.00), and "The organization has clearly articulated strategies or action plans for achieving its goals" (p=.02; Exhibit 7). There was also a non-significant trend toward increased agreement with the statement, "The organization had a clearly defined mission statement." For all areas, much of the improvement was achieved during the first six months of coaching, indicating that benefit in these areas can be realized early on.

Exhibit 7: Changes in Mission, Vision, and Goals

Statement=	Mean Level of Agreement at Baseline* =	Mean Level of Agreement at Final Post-test* =	p Value=
The organization has a clearly defined mission statement. (n=23) [†] =	4.26=	4.57=	.15 ^{ns} =
The staff, the Board, and I are aligned with the organization's mission statement. (n=23) [†] =	3.77=	4.50=	.00 [†] =
I have a clearly defined vision for where the organization is headed. (n=24) [†] =	3.61=	4.22=	.00 [†] =
The organization has clearly articulated strategies or action plans for achieving its goals. (n=23) [†] =	2.77=	3.41=	.02 [†]

*On a scale of 1 to 5, where 1 = "strongly disagree" and 5 = "strongly agree."

[†]Most of the reported increase in level of agreement occurred in the first six months (between baseline and mid-point surveys).

[†]Statistically significant at the p<.05 level.

ns = not significant at the p<.05 level.

In his interview, one ED recounted the specific process that he and his coach went through to clarify the organization's vision and garner support for it:

My coach and I had a sit down session. It was throwing out a lot of ideas and words, putting things on paper and narrowing it down into a clear and concise set of visions. ...The next step was to take this to my administrative staff: "This is what I'm about and

what I think about the organization and where I see the organization going.” I got buy-in from the administrative staff but not so much with the Board. For me, I knew where I wanted to go with the organization.

Organizational Infrastructure

On their surveys, EDs reported statistically significant improvements in the clarity of decision-making processes ($p=.00$), the existence of written policies and procedures ($p=.01$), and clarity regarding roles and responsibilities of staff ($p=.01$; Exhibit 8). There was also a non-significant increase in agreement that a staff grievance procedure was included in the organization’s personnel manual.

Exhibit 8: Changes in Organizational Infrastructure

Statement=	Mean Level of Agreement at Baseline* =	Mean Level of Agreement at Final Post-test* =	p Value=
The organization has a clearly defined decision-making process. (n=21) [†] =	2.57=	3.33=	.00 [†] =
The organization has written policies and procedures. (n=23)=	3.30=	3.91=	.01 [†] =
The organization’s personnel policies include a clearly defined grievance procedure for staff. (n=23)=	3.78=	4.04=	.21 ^{ns} =
The roles and responsibilities of all staff positions are clearly defined. (n=23) [†] =	3.13=	3.87=	.01 [†]

*On a scale of 1 to 5, where 1 = “strongly disagree” and 5 = “strongly agree.”

[†]Most of the reported increase in level of agreement occurred in the first six months (between baseline and mid-point surveys).

[†]Statistically significant at the $p<.05$ level.

ns = not significant at the $p<.05$ level.

Financial Stability

In their interviews, several EDs reported improvements in their organizations’ fundraising capacity, and at least two organizations avoided severe financial trouble because of coaching. For these two organizations, the coach’s technical skills in the area of fund development proved essential. The ED at

the first of these organizations recounted how her organization was saved from having to shut its doors:

We were looking at staff layoffs and at closing the organization down. ...We basically had a funding gap for about three to four months. ...I had a call with [my coach] and I told her that my last hope is gone. She responded, "Well, I can put on a coaching hat or put on a development hat with you." So we designed together a private donor campaign—\$66,000 in six weeks. We set up a structure with fundraising and made it look much more presentable. The Board accepted it and we launched it and we raised \$73,000, and we had someone step up the second day...and he matched the \$73,000 and our whole fortune flipped. I couldn't have done it without my coach.

The ED of the second organization was able to make payroll because of his coach's assistance with fundraising. He explained,

Last April, there was a time where we didn't know how we were going to meet payroll the next month. The funding that we were expecting didn't come through...and my coach talked to me about doing this one-time fundraising event. ...So we did one open house...and we invited people who had been supportive of us in the past. ...We raised about \$30,000 in one night. We made payroll. There was an outpouring of support.

The achievement of such dramatic outcomes was not consistent across EDs. One ED related that her expectations for coaching were not met in the area of fundraising. She commented, "The bottom line is that we are not doing well as an organization. We're doing poorly financially. I guess I expected that going into coaching, that would improve."

Organizational Effectiveness

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."

Another internal change noted by a few EDs in their interviews was an increase in staff satisfaction and confidence. One ED asserted, "The staff are happy. People like to have a vision. They have been very pleased with the way we performed in 2002." Another explained the mechanism for how coaching works in this area, commenting, "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."

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 commitment, leading to an increased level of involvement on their part.

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 attributed this phenomenon to the impact coaching had on his confidence. He remarked,

Coaching has brought about confidence for me, and it shows. People see that and it gives them hope and inspires them. The Board is so energized right now, and everybody is looking to a bright future in the agency. ...The confidence I gained through coaching spilled over to the agency. We know that the agency can do it and that it can serve the community.

The widely held belief among participating EDs that coaching works is also shared by others in their organizations. Some EDs reported that their organizations are supporting continued coaching for the ED after the Executive Coaching Project ends. 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.

How Coaching Impacted Organizations

Coaching had an impact on EDs’ organizations through two primary mechanisms: 1) via the coach working directly with staff and/or the Board, and 2) via the ED using coaching skills within the organization.

Coach Working Directly with Staff/Board. Thirteen of the 24 EDs (54%) utilized some of their coaching hours to work with their senior staff or board members. EDs used up to 10 of their allotted 40 coaching hours for the coach to work directly with the staff/Board. Sometimes this coaching was done on an individual basis (e.g., telephone conference with the Board president), and other times it was done in a group setting (e.g., staff retreat). For example, at one organization, the coach held a day-long session with staff to discuss core practices in the organization, the methodology and the structure we use to encompass the vision and mission and how that affects everyday operations. In her interview, one ED articulated how she used coaching hours for conflict resolution and later contracted with her coach for continued organizational support:

We had a problem with a consultant, so I brought in the coach to work with me and two other staff people, to better understand the nature of the problem, and to get some resolution. And it was very effective. She came in twice and she’s now working with one of those staff members. We’re paying, outside of CompassPoint, for the coach to work directly with the staff.

However, not all EDs experienced positive outcomes when their coach worked with their staff or Board. One ED recounted in her interview, “When the Board met my coach at a meeting, the reaction was not good. My coach got the impression that the Board saw her as a threat. ...One of the reasons I think this happened was because I didn’t set up any expectations with the Board.” In another case, sessions with staff and Board proved not to be as “dynamic” as the coaching sessions with the ED, and thus they had only limited success.

ED Using Coaching Techniques with Staff/Board. The second mechanism by which coaching impacted organizations was through the ED using coaching skills with staff or the Board. In many cases, EDs successfully adopted the approaches modeled by their coaches. A common theme among those EDs who adopted the coaching role was to emphasize and celebrate staff achievements, with the goal of inspiring confidence. One ED described in her interview, “I used techniques on my staff, such as some of the reflective questions [my coach] asked me, I would ask the staff similar reflective questions. ...Sometimes, with staff who lack self-confidence, I’m doing some reflective feedback to highlight the staff’s achievements.” Another 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.”

IMPACT ON ATTITUDES AND BELIEFS

On the baseline survey, EDs reported a high level of agreement with the statements “My work is meaningful” and “My work positively challenges me” (Exhibit 9). At final post-test, there was a statistically significant increase in the degree to which EDs’ work positively challenges them ($p=.04$) but not in the degree to which their work is meaningful. Most of the increase in agreement with both statements occurred during the first six months of coaching (i.e., between baseline and midpoint surveys), which may indicate that benefit in these areas can be realized early on in a coaching experience.

Exhibit 9: Changes in Attitudes and Beliefs About Work

Statement=	Mean Level of Agreement at Baseline* =	Mean Level of Agreement at Final Post-test* =	p Value=
My work is meaningful. (n=23) [†]	4.61=	4.78=	.26 ^{ns} =
My work positively challenges me. (n=22) [†]	4.45=	4.82=	.04 [‡]

*On a scale of 1 to 5, where 1 = “strongly disagree” and 5 = “strongly agree.”

[†]Most of the reported increase in level of agreement occurred in the first six months (between baseline and mid-point surveys).

[‡]Statistically significant at the p<.05 level.

ns=not significant at the p<.05 level.

ED interviewees reported an overall increase in their work-related confidence. One ED asserted that coaching directly affected how she perceived her abilities:

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 for improvement were things that I already knew about. ...The 360-degree assessment grounded me and the realities of my strengths. ...The coaching helped with my confidence.

EDs who were interviewed also reported increased confidence in particular skill areas, such as management and leadership. These are discussed earlier in this report, under “Impact on Leadership, Management, and Technical Skills.”

Finally, one ED attributed a complete change in his work attitude to his coaching experience. He related,

Four months ago, everything was like a dead end...having a Board who didn't know what to do with me, an organization that was having problems, putting my own personal money in to help fund the agency. ...I remember [my coach] posed some questions to me, and I don't remember what the questions were, but it ate me up the whole day. The next day, I realized that I'm tired of taking shit from all these people, and I said, "This is what I'm going to do. With my work, I'm going to give it just one big kick in the ass, and if nothing works out, whatever happens, I know that I gave it one big kick in the ass and didn't give up."

IMPACT ON PERSONAL LIFE

Several EDs prioritized creating a better balance between their personal and professional lives by focusing more on their lives outside of work. 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 (p=.02; Exhibit 10).

Exhibit 10: Changes in Effectiveness at Creating Personal/Professional Balance

Statement=	Mean Level of Agreement at Baseline*=	Mean Level of Agreement at Final Post-test*=	p Value=
I am effective at balancing the demands of my personal and professional life. (n=23)=	3.04=	3.61=	.02 [†]

*On a scale of 1 to 5, where 1 = "strongly disagree" and 5 = "strongly agree."

[†]Statistically significant at the $p < .05$ level.

In her interview, one ED related how her coach walked her through the process of creating this personal/ professional balance. Like other EDs, creating this new balance resulted in shifting some attention from her work life to her personal life by implementing a regular exercise plan:

The coach in the beginning went through exercises that demonstrated clearly what parts of my life were out of balance. It was crystal clear that my personal life was not receiving much attention. Too much time and energy was devoted to work. From that I started paying a little more attention to my needs and wants. The best example was I took an exercise class and worked on a jogging program and I ran a 10K. Now I set aside two hours a week for personal time. That created a success for me.

Other EDs found that focusing on their personal lives and needs allowed them to explore their creativity, spend more time with their family, and alter their hours spent at work. To achieve this shift in emphasis may require a shift in what EDs expect of themselves. One participant revealed in her interview,

I felt that if my employees were staying until six, I thought I had to stay until six even though I came in at seven in the morning. We talked about changing those kinds of mindset issues. ...[Once] I overslept and I didn't call and was late for our coaching session. [My coach said], "Hurray, I love it when an ED sleeps!" It was the opposite than what my mind thought, which was "I'm late."

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.

IMPACT ON JOB SATISFACTION

The evaluation examined several aspects of job satisfaction, including job stress, burnout, number of hours worked, and overall happiness in a job, to determine the effects of coaching in these areas.

Job Stress and Burnout

On the ED surveys, there were no statistically significant changes between baseline and final post-test regarding frequency of feeling burned out, the perceived level of job-related stress, or feeling that the job responsibilities are more than they can handle (Exhibit 11). EDs were also asked whether anything out of the ordinary was going on in their personal or professional life that might affect their job satisfaction, so that during analysis, it could be determined whether any increases in job stress and burnout were due to these extenuating circumstances. Even when this factor was taken into account during analysis, there was no statistically significant change over time in the level of job stress and burnout.

Exhibit 11: Job Stress and Burnout

Question=	Mean Score at Baseline=	Mean Score at Final Post-test=	p Value=
How often do you feel burned out? (n=23)*=	2.96=	3.09=	.42 ^{ns} =
How often do you feel your job responsibilities are more than you can handle? (n=23)*=	3.17=	3.00=	.38 ^{ns} =
My job related stress is...(n=23) [†] =	3.43=	3.48=	.79 ^{ns}

*On a scale of 1 to 5, where 1 = "never" and 5 = "always."

[†]On a scale of 1 to 5, where 1 = "very low" and 5 = "very high."

ns = not significant at the p<.05 level.

Despite the lack of statistically significant change over time regarding burnout, several EDs reported in their interviews that coaching helped to reduce stress and burnout, by encouraging EDs to take vacations and time for themselves on a regular basis. One ED pointed out, "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." Other EDs predicted that they will be well-equipped to avoid or better cope with future burnout by using skills they learned through coaching: "I think it will make a difference in the kind of energy and self satisfaction I get out of the job, and it will have a long-term effect of slowing burnout. I feel like I'm in a much better position and have a much better ability to deal with burnout and being overwhelmed." One ED summarized the substantial reduction in her stress levels that resulted from her coaching experience. She explained,

[Coaching] came at time when I was stressed with my job. It helped reduce my stress. ...I'm happy to goof off now, and I don't want to work as much. In the year before, I was working a lot of overtime. I took a vacation this year. I negotiated with my Board

up to eight weeks off per year. It was big for me to think that I can do this job without having to be here all the time.

Job stress and burnout are complex phenomena that are influenced by many factors. Some of the factors that may have affected stress levels among EDs participating in this project include dwindling resources for nonprofits as a result of upheaval in the economy, being on a learning curve as a new ED, and increased efforts to deal with challenging situations as a result of coaching. Because of such factors, it may not be reasonable or appropriate to expect a reduction in job stress as a result of coaching. Finally, it is important to note that job stress is not inherently detrimental, but too much stress can be harmful. The measures of stress used in the ED survey do not distinguish what EDs considered to be “too much stress.”

Number of Hours Worked per Week

Regarding number of hours worked, about half of EDs were working fewer hours at final post-test than they were at baseline, and about half were working the same number of hours, indicating that coaching may have had an impact in this area (Exhibit 12). Between 80% and 90% of EDs, depending on the survey time point, reported working 41 to 60 hours per week (Exhibit 13).

Exhibit 12: Change in Number of Hours Worked per Week Between Baseline and Final Post-test Survey

Hours Worked per Week (n=22)=	n=	%=
Increased=	2=	9.1%=
Stayed the same=	10=	45.5%=
Decreased=	10=	45.5%=
Total=	22=	100.0%=

Exhibit 13: Number of Hours Worked per Week at Each Survey Time Point

Number of Hours Worked per Week=	Baseline Survey (n=22)=		Midpoint Survey (n=23)=		Final Post-test Survey (n=24)=	
	n=	%=	n=	%=	n=	%=
Under 30=	=	=	1=	4.3%=	=	=
30-40=	=	=	=	=	2=	8.7%=
41-50=	12=	54.5%=	12=	52.2%=	13=	56.5%=
51-60=	7=	31.8%=	8=	34.8%=	6=	26.1%=
More than 60=	3=	13.6%=	2=	8.7%=	2=	8.7%=
Total=	22=	100.0%=	23=	100.0%=	23=	100.0%=

Overall Job Satisfaction

In their interviews, 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 declared, “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.” Another 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 believes will prevent isolation even after coaching ends.

One ED found that coaching introduced challenges that sometimes felt overwhelming, which influenced her job satisfaction. In her interview, she explained,

[Coaching] was a mixed bag. It affected and helped me get to the heart of difficult conversations. It's possible to have a high level of job satisfaction and [prevent] burnout by avoiding and not dealing with hard situations. ...Right now I'm relieved not to be coaching and not taking on hard conversations.

IMPACT ON TENURE AND TURNOVER

Survey findings suggest that EDs’ planned tenure was either the same as they had anticipated before they began coaching or shortened (Exhibits 14 and 15). In fact, there was a significant decrease in the length of time EDs planned to stay at their organizations between the pre-test and final post-test ($p=.00$). However, at least some of this decrease can be attributed to the year that elapsed between the pre- and final post-tests.

Exhibit 14: Change in Number of Years EDs Plan to Remain at Their Organizations Between Baseline and Final Post-test Survey

Number of Years EDs Plan to Remain=	n=	%=
Increased=	0=	0.0%=
Stayed the same=	13=	54.2%=
Decreased=	7=	29.2%=
Other*=	4=	16.7%=
Total=	24=	100.0%

*Other = Projected length of tenure is contingent on some factor, such as whether Board chair stays, whether organization reaches a particular goal, or whether organization gets restructured.

Exhibit 15: Tenure and Turnover

Number of Years ED Plans to Stay at Organization=	Baseline Survey=	Midpoint Survey=	Final Post-test Survey
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	n=	%=	n=	%=	n=	%=
Less than one year=	=	=	=	=	2=	8.7%=
One to two years=	4=	16.7%=	9=	37.5%=	5=	21.7%=
Three to four years=	11=	45.8%=	6=	25.0%=	8=	34.8%=
More than four years=	7=	29.2%=	7=	29.2%=	5=	21.7%=
Other*=	2=	8.3%=	2=	8.3%=	3=	13.0%=
Total=	24=	100.0%=	24=	100.0%=	23=	100.0%

*Other = Length of time is contingent on some factor, such as whether Board chair stays, whether organization reaches a particular goal, or whether organization gets restructured.

However, the interview findings suggest a wider range of tenure-related outcomes than were captured quantitatively in the survey. The four different outcomes described in the interviews were:

- EDs already stayed or planned to stay longer than anticipated.
- EDs gained a self-awareness that led them to question whether they want to remain at their jobs.
- 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.

First, some EDs reported that they had already stayed at their organizations longer than originally planned. A few EDs reported that, had they not experienced coaching, they might not be at their organizations today. One ED explained,

[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...

One of the twenty-four participating EDs left his organization shortly after coaching ended. He asserted, "I probably wouldn't have made it through the year without the coaching to bounce off information. It helped sustain my year. I would have bailed out earlier."

Related to this same outcome, some EDs reported that coaching increased the likelihood that they will remain at their organizations longer than anticipated. They attributed this change to the reduced burnout and increased confidence and job satisfaction that coaching helped support. One ED summarized, "By making life easier and better here at work, [coaching] prolonged my tenure here. Most people would leave a job if they were unhappy."

Second, the coaching experience prompted a level of self-awareness among some EDs that led them to question whether they will stay at their jobs. For example, some questioned whether the job fulfilled their needs and desires:

[Coaching] gave me the incentive to start looking at whether I want to continue doing what I'm doing. I want to have more creativity in my life. ...Coaching taught me to pose questions for myself: "Is it something I can have in my current position?" It helped me be comfortable with questioning and reevaluating...

Others developed an awareness that they will not feel comfortable leaving their organizations until they have resolved particular issues or strengthened organizational capacity; in other words, EDs described wanting to pass on a healthy organization to their successors and had begun planning for this with their coaches. One ED revealed, "I'm still thinking about how I can do [succession planning]. ...It would be detrimental if I leave now, I can't just leave. [My coach and I] talked a lot about that. We talked about different ways to look at it, to list different things the organization will need in the future..." Another ED explained her need to resolve a staffing issue:

I need to resolve [an issue with a staff member] before I can make this decision to leave, and my coach really echoes that. He's really helped me, especially because he has worked with me to make the organization sustainable if I leave. ...He encouraged me to meet my responsibilities, of not just leaving because of the staff [issue], but to stay and resolve the issue for the organization and the next ED while I was there.

Another ED's increased self-awareness led her to conclude that she may not be the right person for the job. She explained,

I attribute coaching to depersonalizing myself from the organization. ...Now I can say that I may not be the person to see the project completed. And it's hard for me to say that, or admit that. My role is to take the organization to point X and to see what the organization needs in order to move to the next step, even when it may be another person or ED doing it. ...The realization of this represents a point of growth for me.

Third, a few EDs asserted that their level of dedication to working in the nonprofit sector did not change. 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." Another echoed this sentiment, and indicated that coaching was critical for supporting his commitment: "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."

Finally, some EDs explained that, regardless of what the future brings in terms of a career, they are better off for participating in the coaching project. One ED commented, "I don't really have plans to leave the organization. ...I do have a strong sense, no matter what I'm doing and where I end up, that I will do a good job. I have more confidence about what I can do. I've taken notice of my abilities through coaching." In addition to the increased confidence that would be applicable in any career, the leadership and management skills are also transferable, as one ED elucidated:

[Coaching] definitely has influenced my career aspirations primarily by helping me to see that I am good at upper management. I know I'm good at middle management, but being an ED was a stretch for me. ...The coaching helped me stay in this discomfort. It kept me from running long enough to start seeing that I could be effective at higher-level management. If I can't be successful in this agency or in another one...then I might choose [another type of work]. I definitely know I have the leadership skills.

Regardless of tenure plans, many of the benefits of coaching extend to the organization as described earlier, and even if an ED decides to leave his or her job, it is possible that the organizational effects may be sustained.

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. However, there are other skills that participants believe may prove harder to sustain, as explored in the final interviews.

First, some EDs now use the process of reflection and introspection on an ongoing basis as a way to promote the fulfillment of the organization's mission, vision, and goals. One ED described a particular exercise that the coach had her do: "I made a list of questions I can ask myself when things get challenging. We identified questions that I keep in front of me—challenge questions [that I can ask myself to help me think through the situation]." Like a few other EDs, this ED admitted that maintaining the time for reflection will be challenging, despite having the list of questions. To address this challenge, she and another ED have planned to meet once a month to coach each other and "to talk and learn from each other and sound off on each other."

Second, the increased self-awareness, self-acceptance, and insight gained through coaching, according to EDs, will have an enduring effect on the EDs' leadership in their organizations. One ED asserted, "I think I gained valuable insights into my strengths and weaknesses as a leader. I gained valuable communication tools. And I had a good sounding board for my own self assessment." Some EDs also described a sense of self-acceptance that will persist after the project ends. One stated, "...I'm more accepting of my own style and I'm realizing that I am not going to be...a schmoozing kind of ED. Coaching gave me more acceptance of who I am as an ED." A third ED noted that she unexpectedly improved her communication skills because she gained a greater self-awareness of her communication style.

Third, EDs held mixed opinions about whether the accountability, structure, and discipline that coaching provides could be sustained for the long term. In particular, the frequent check-ins inherent in coaching were critical for many EDs to move forward. As one participant predicted, "The biggest thing coaching assisted me with is having someone to bounce things off. It helped strengthen my decision-making. ...That's the biggest thing that will be harder to maintain." At least two EDs developed strategies to sustain this aspect of coaching, where they now check in with a colleague or friend to keep each other accountable. Another ED commented on a skill that helped her maintain structure during coaching, which she continues to use: "One of the skills is creating a reasonable set of objectives for any given day, week, or month. I used to create objectives but they were not reasonable. I am more rational in setting of objectives. That skill will stay with me."

Fourth, some EDs expect that the self-esteem and confidence realized through coaching will continue. For example, one ED noted her newfound confidence in the validity of her "instincts and experience," which will continue to serve her, particularly in the area of working with her Board. A few EDs explained that it was the ongoing support their coaches provided that led to such increases in confidence, and they questioned whether they would be able to maintain the confidence in the absence of such support: "In a holistic way, [coaching] helped my self-esteem, by having someone in my corner, an angel on my shoulder. ...The real test is keeping this feeling without my coach."

Fifth, EDs described specific tools, techniques, or strategies they learned that they will continue to use, such as techniques for networking with funders, skills related to the development of meeting agendas and outcomes, communication tools, project management frameworks and guidelines, and methods for staying organized. One ED summarized,

[My coach] wasn't just a cheerleader. It was "this is what is going on, and here are some strategies" and giving me something for the future. Coaching helped me deal with current stuff that was going on with my organization, but it was also giving me a personal development tool [for the long run].

Finally, on their final post-test surveys, EDs reported a moderate degree of interest regarding incorporating coaching into their staff and Board development, which could help sustain the influence of coaching on the ED and the organization (Exhibit 16).

Exhibit 16: ED Interest in Incorporating Coaching into the Organization

Statement	Mean Level of Interest*
How interested are you in incorporating coaching into your organization's <u>staff development</u> in the future?	3.8
How interested are you in incorporating coaching into your organization's <u>Board development</u> in the future?	3.6

*On a scale of 1 to 5, where 1 = "not at all interested" and 5 = "very interested."

In conclusion, it appears that EDs learned many skills and approaches that will continue to serve them well in their jobs even after coaching ends, even if some of these skills will be harder to sustain than others.

CASE STUDIES

OVERVIEW OF CASE STUDIES

The case studies are designed to illustrate the variety of experiences and outcomes that different EDs had with coaching. Each case study focuses on a particular area or areas where coaching did or did not have an impact, and not on the entirety of the ED's experience. All names of EDs are pseudonyms to protect anonymity.

All case studies included an interview with the ED and a review of the ED's learning contract and coaching logs. In addition, data sources specific to each case study were:

Laura

- An interview with a staff member
- An interview with a colleague outside of the organization
- Notes from the evaluator's observation of a coaching session

Hubert

- An interview with the Board president
- Notes from the evaluator's observation of a coaching session

Marilyn

- An interview with a staff member
- An interview with a Board member

John

- An interview with a staff member

Nick

- An interview with a staff member
- Notes from the evaluator's observation of a coaching session

LAURA'S EXPERIENCE

Laura set out to accomplish many goals and objectives during her coaching experience, including developing a clear vision for the organization, creating a strategic plan, enhancing her confidence in her leadership abilities, and implementing a mechanism for reflecting on her experiences so that she could learn from them. By the end of coaching, she had accomplished all of this and more. Success in one area facilitated successes in other areas, thereby increasing her confidence. With encouragement from her coach, she celebrated her achievements along the way, further enhancing her sense of effectiveness.

Laura, her project coordinator, and a colleague outside the agency were interviewed for this case study. They unanimously agreed that Laura sharpened her focus since she began coaching, and this new focus has strengthened the organization. Much of this success, the interviewees concurred, was attributable to the three-year strategic plan that she developed during the year, with support from her coach and

technical assistance from another Executive Coaching Project coach. Having this plan in place helped boost Laura's confidence in her ability to say 'no'. The project coordinator explained,

I think the strategic plan helped us to be more thoughtful in terms of our workload and in terms of the direction that the agency moves toward. ...I used to feel like any opportunity that popped up, we would take on the project. ...[Now, Laura] feels more confident to tell us what we can and cannot take on.

Laura's increased focus, according to interviewees, was also a result of her taking time to reflect on her experiences. Laura explained, "[My coach] would be a reflective mirror about the positive things she saw and call attention to them, and I would say, 'Oh my goodness, you're right.'" As she progressed through coaching, Laura learned to incorporate reflection into her approach to work. Her colleague observed, "[Laura] is very thoughtful and intentional in what she's doing and that has grown in the last year. I think she came [to the organization] with it, but it has [been] enhanced in the last year." According to her project coordinator, Laura also began to share with staff her reflections about issues that might affect the organization or the work at hand. The project coordinator found this process very helpful for keeping the work focused and ensuring that the staff were all on "the same page."

The impact of this newfound focus that Laura developed ultimately benefited the organization. Even in tough economic times, Laura increased the organization's membership. She developed widespread internal buy-in with the organization's vision. She remarked, "Through the strategic planning process itself, as staff all sat through, they saw the bigger picture and understood more about what we are doing...[They] understand their role as part of a whole." In essence, she increased the organization's effectiveness. Her colleague noted,

A year ago, internally, the organization was strong. I would say that now, internally, the organization is thriving, not just maintaining, because staff have an internal new strategic plan and had opportunities to clarify their roles and work styles. [Laura] is an effective manager and leader and an effective communicator. ...I think the coaching has helped.

Laura indicated that one of her most important achievements during coaching was that she shed some of her self-doubt regarding her abilities. She asserted, "I definitely feel a lot more confidence. I could actually feel the difference from where I was a year ago." Both her colleague and her project coordinator noticed this increase in her confidence. The project coordinator observed,

...I think she has developed more confidence in her leadership abilities. I think that she asks more questions. She's more willing to try to see if there are more alternative ways. She's a little more vigilant. ...[S]he just feels more confident in not having to say 'yes' to everything that people want. ...[People] really respect the work that she does...I think she's really come to recognize that in the last year.

One key to Laura's success was the structured approach that she and her coach developed. Her goals and sub-goals were specific and measurable. Support from her coach and frequent re-examination of her learning contract helped keep her focused and accountable to her goals. Overall, Laura found her coaching experience to be highly rewarding.

HUBERT'S EXPERIENCE

Hubert was the first ED of his organization, so he faced the monumental task of building a team of dedicated individuals to move the organization toward fulfilling its vision. In this area and others, Hubert felt that he needed to bring some structure to the process. He noted, “[Before coaching] I felt like I was drinking out of an open fire hydrant. I’m a big fan of frameworks of running an organization and structuring. I thought that coaching might help me to develop these frameworks.”

Coaching did in fact help him develop these frameworks, especially in the area of human resources, which was critical for developing a core team of committed staff. For Hubert, this involved making decisions about whether existing staff were appropriate as well as decisions regarding hiring new people.

During coaching, Hubert encountered a challenge when one of his staff members was not invested in his vision for the organization. The coach encouraged him to have an open discussion with her about this issue, which he did. Ultimately, this staff person decided to leave. Hubert’s Board president, who was also interviewed for this case study, identified his handling of this issue as a success: “With the human resource issue, I saw some growth there. He bumped his head there a few times and asked for a lot of advice. He grew there in terms of dealing with an HR problem. He was dealing with it personally at first, and then he just dealt very well with it.”

In a subsequent session with his coach, they discussed how this person’s leaving made Hubert feel. He lamented, “I’m pissed at myself for not being an inspiring enough leader to get her to believe in the mission. More than anything I just feel low.” His coach helped him re-frame his response to this situation, responding:

So there are some emotional and practical things to deal with. Notice the critical place you go to inside. Notice you are still going to a place of beating yourself up. It’s important to grieve it and acknowledge it, but also notice the pattern and think about practices to deal with it.Let’s try to get a better perspective on where the breakdown occurred, instead of “where you messed up.” Do you get the distinction?...It was about a misalignment in...cultural values.

From that point, with his coach’s support, Hubert was able to begin to think about building a new team. He and his coach worked to develop a framework for hiring a development director who would reflect and promote the organizational culture. “My suggestion,” said his coach, “is that you take this list and ask people you are going to hire to commit to it. Then I would set up some periodic conversations and come back and touch base on the conditions of satisfaction.” Together, Hubert and his coach developed a list of traits and criteria for choosing this new person. Using these criteria, Hubert hired a new development director, and according to Hubert, “We’ve been more successful in fundraising, [and] we have a solid fundraising strategy.”

Along with building a core team of staff, Hubert also developed what he referred to as an “entrepreneurial” approach to his work as a result of coaching. His Board president noted that his skills in this area were a good match for the organization’s needs. He commented,

[Hubert] has stepped up to the plate. When the organization was planned it was a different economy...so...the [original] business plan was of little value. To [Hubert’s] credit, he was able to reinvent the organization quickly, with building consensus of the managing group and staying to the objective of the organization, and so he has done a very good job and I believe that other members of the Board would concur with that.

Specifically, Hubert moved from a mass marketing approach to focusing on building partnerships with specific organizations, which has led to the development of “a solid basis of financial support,” according to the Board president.

Because the coaching started early in Hubert’s tenure as the organization’s first ED, the Board president did not have an opportunity to observe what Hubert was like without coaching; therefore, the effects of coaching were essentially invisible to him. He noted, “[Hubert] has done an excellent job. I don’t know how much credit can be given to the ED coaching project...It’s not like Hubert came to me and said, ‘I’m doing this and that, or I’m able to do this better because of my coaching.’” However, Hubert himself clearly articulated how coaching contributed to his progress over the course of the year: “...the framework and the guidance helped me. [Before coaching] the organization was at a lull point. There were some staff issues that emerged that could have gone from bad to worse, but it went from bad to good. I applied the frameworks that my coaching provided.”

MARILYN’S EXPERIENCE

Marilyn had a number of goals for her coaching experience, including asserting her leadership position in the organization and restructuring the organization. What she did not plan on was taking the lead so soon with the organization’s fundraising processes and financial situation. In fact, one of the reasons against accepting the ED position was her resistance to fundraising and her lack of confidence in this area. Throughout the year, the coach helped her face her discomfort with fundraising, and the leadership she developed in this area had an impact on organizational processes.

First, Marilyn was faced with some tough decisions about consolidating and relocating the organization’s offices in order to mitigate the financial hardships the organization faced. One of her staff members highlighted Marilyn’s strong leadership as one factor that facilitated implementation of the relocation: “She responded by taking charge...She researched it very thoroughly and found out what our options were. ...She was quick to take action.” One of her Board members described her as thinking “creatively” about the move. He commented, “...she was very new to the organization and she suggested some radical changes in terms of facilities. ...She jumped on the opportunity and changed the direction. She was revolutionary in her ideas and she made a great shift and enhanced the benefit of the move.”

Although all interviewees agreed that the organization still faces serious financial difficulties, they also asserted that the organization has shifted and improved its fund development strategy due to Marilyn’s leadership. In her interview, Marilyn described her attempts to move the Board into more of a fundraising role. The interview with her Board member demonstrated that she was successful in this area. He noted:

I think that the role of the Board has changed also. In the past, the Board has been operation focused. ...We are changing our focus to being a development board, and her leadership has allowed the Board to move towards focusing more on development. Prior to [Marilyn] coming on, the Board was more in a defense mode. ...Now we are more future-oriented.

The Board member asserted that Marilyn’s “confidence has grown tremendously,” as have her communication skills, which led to “effectively communicating her vision and strategies to the Board.” As a result of the work Marilyn and her coach did around fundraising, and the subsequent shift in the

Board's role, the organization increased the amount it raised during its annual appeal by 66% over the previous year's amount.

The coaching process that facilitated these successes put Marilyn's ideas at the forefront, with the coach acting as "cheerleader." Marilyn explained, "My coach wasn't directive at all. He went with the flow of what I wanted to do. He would go with me. I think it's really important for coaching, otherwise you take away the autonomy." As a result, Marilyn felt ownership over the coaching process and its outcomes.

JOHN'S EXPERIENCE

John hoped to address several issues through coaching, such as gaining a better understanding of his employees' work styles and interests and identifying his role regarding intervening in difficult situations that arise (e.g., staff issues). Although coaching helped to reduce John's anxiety level about being an ED, it fell short of his expectations in that he did not feel he developed a "tool kit" that he will take with him into the future.

John did not attribute his less-than-satisfying coaching experience to a failure on the coach's part. Several factors conspired to limit his growth in certain areas. For example, he and his coach were not able to develop a close working relationship, due to logistical factors. John explained,

I wasn't working very closely with her after [a meeting held with Board and staff]. My scheduling is a mess. I end up putting out fires all the time. I have two offices and so sometimes we would cross paths...so we had those kinds of problems frequently and it was much [more] my fault than hers. Lots of problems with documents and not getting attachments via e-mail. That definitely set us back. [My connection with her] kind of ebbed and flowed.

As a result, there was a lack of follow-through in areas where John might otherwise have made significant progress. For example, his coach helped him develop a process in which his Board and staff had an opportunity to give him feedback on his performance, but there was no follow-up to identify how the results of the exercise could be useful to John or the organization.

Despite these challenges, the coach helped John move forward restructuring the organization's compensation plan, which John had identified as a priority. The coach prompted John to think through all the issues around setting up a process for the restructuring and to identify the questions that needed to be answered in order to determine what the new plan would look like. The process he and his coach designed involved ensuring that everyone had an opportunity for input:

My coach was useful because she helped to organize that meeting [to gather input], the structure, and make it a safe place for everybody to be heard and to talk. Everyone felt like their voice had been heard, and now the Board decides for or against their idea. There wasn't consensus on staff, but at least everyone felt like they've been heard. That was important.

She also helped him select the important questions that the Board needed to consider in order to make key decisions related to restructuring the compensation plan. The staff member interviewed noted that

John communicates well with the Board, which likely helped to facilitate the outcome of restructuring the compensation plan, which included the establishment of a personnel committee, a new salary step system, and a 401K plan.

NICK'S EXPERIENCE

Nick went into coaching at a time when he was experiencing challenges in working effectively with his Board of Directors. He hoped that coaching would “be a way to gain some skills to better communicate with them.” He described the outcome he envisioned: “...I hoped to learn new skills and the end result was that I would be a better leader with my organization and have a better relationship with my Board.” However, a different outcome resulted – Nick left the organization shortly after his coaching experience ended. He explained, “At the end of the experience, I realized that in the long term, it wasn't a good fit between me and the organization, specifically, the Board of Directors.”

At the outset, Nick invested a great deal of time and effort into improving his communication skills. This effort paid off in improved staff relationships. Nick took the lead in sharing his feelings with his staff:

What went well, was me opening up with the staff, sharing with my staff 'Here's where I'm frustrated, and here's where I am nervous.' Very rarely did I let my administrative staff know that I was nervous or frustrated before the coaching project. I kept it cooped up. It was beneficial for folks to know when those things were happening. They get a sense of where I was in that situation.

In addition, Nick's coach helped him set up a team-building session with staff. The staff member who was interviewed noticed that, as result of this activity, the “dynamics” of the management team changed. The staff then began to meet regularly, which they had not done previously, and according to the staff member, “[Meeting] became a positive part of our week. Very positive.” Nick agreed, noting that, after the team-building exercise, “Our staff meetings became rich in dialogue.” As a result of this process, the ED and the staff developed goals and expectations for the organization and for what they, as the employees, could achieve.

With Board relations, the process took a different turn. In a coaching session the day before he met with the Board, he and his coach worked on how he had dealt with confrontation in the past and how that might be changed. She commented, “We've talked about your discomfort with confrontation. My sense is that stepping into an adversarial situation, the prospect of making it more confrontational, is painful.” Nick responded that he often “absorbs” negative energy and experiences as a mechanism for protecting others. By the end of the session, they had re-framed his perception of the upcoming Board meeting from being potentially confrontational to an opportunity for him to be honest and direct with them.

Despite his preparation, Nick's approach did not have a positive impact on his relationship with the Board. With his coach's guidance, he tried several strategies, including meeting with Board members individually as well as in a group. Nick described the result:

Ultimately, it didn't matter. [The Board] had their idea of a submissive leader. I had tools to express...“Hey, this is how I am feeling.” The Board was taken aback, and they became defensive and surprised. The culture, in terms of them being older with different

folks doing things in different ways, it was hard for them to understand me, but I think it was important for them to hear me out.

Because of the work Nick had done to improve his relationship with his staff, he and his staff were able to support each other through the times of “mourning” and feeling “beat up” by the Board. His coach also offered support through the difficult periods by emphasizing the accomplishments and effectiveness of Nick and his staff.

With guidance and support from his coach, Nick ultimately determined that he and the Board would never see eye to eye, and he left the organization. During his tenure there, Nick and his coach spent some time focusing on the aspects of his job that were satisfying to him. He discovered that organizing special events was what motivated and inspired him, as opposed to running a whole organization. As he plans his future career path, he will take this new insight into consideration.

OVERALL SATISFACTION WITH THE COACHING PROJECT

SATISFACTION WITH THE COACHING EXPERIENCE

As described earlier, EDs widely agreed that their coaching experience met and often exceeded their expectations. On their post-test surveys, they reported a high degree of satisfaction with their coaching experience (86% of those who answered the survey question reported being “satisfied” or “very satisfied”), a finding that was echoed during the interviews with the EDs.

Three EDs reported a neutral level of satisfaction on their surveys (a “3” on a scale of 1 to 5). In interviews, three EDs reported being less than completely satisfied with their coaching experience, which they attributed to various factors, including inability of the coach to meet the ED’s needs, lack of “substantive engagement” with the coach, lack of experience on the part of the coach in a particular area, and a poor fit between the styles and approaches inherent in coaching and the ED’s personality. The latter ED explained,

Honestly I was convinced [coaching] was not for me. ...Part of my concern was that it was a Western, touchy-feely developmental model. And it fulfilled my expectation. The coach and I had to get past that. ...I did not have an entirely negative experience. But it was not an entirely useful experience either. The coach I worked with is lovely, but it’s not about her...

Despite some areas of dissatisfaction, all EDs reported getting some benefit from coaching. One ED characterized the ways he benefited from coaching despite a mismatch between him and his coach:

I did get help in relieving my anxiety and frustrations, when I feel isolated and I don’t get the support I need from my Board or my staff, just in having someone to talk to. ...She was really helpful for that, but in terms of the concrete stuff, I still don’t have a work plan. ...I think [coaching is] really valuable. I regret on some level that...I feel like I didn’t get the right person, but that doesn’t reduce my value of the project as a whole, and I know that it was very helpful for me.

Because they were highly satisfied, two EDs expressed chagrin that the Executive Coaching Project is ending. One commented, "The only thing that was disappointing was that CompassPoint won't be able to subsidize the ongoing coaching. Ensuring continuity [is important]. You can't start a program like this and just end within a year. It would have been nice to look at the possibility of extending after the first year." Anecdotally, despite the project ending, some EDs opted to continue with their coaches and received financial support from their organizations to do so.

Although most EDs would heartily recommend that organizations invest in coaching for their EDs, staff, or Board, there was great concern about the affordability of coaching. When asked whether coaching was worth \$125 per hour (or a total of \$5000 for 40 hours, which is the number of hours EDs in this project received), most agreed that it was, but expressed skepticism about whether nonprofits could afford it. Several indicated that the subsidization provided by the Executive Coaching Project was helpful. One ED concluded, "It would be a hard sell for \$5000. ...I think it's a lot of money, but it's what you pay consultants...so what are you going to do?...I don't think [my organization] would go for \$5,000. If it were a program subsidized by a grant or fund, we would go for it." One ED speculated that the nonprofit sector "is concerned with funding programs, not about the capacity of the organization to sustain its well-being," suggesting that coaching may be more appealing to Boards of Directors if it can be shown to have an effect on programs and services.

SATISFACTION WITH PROJECT ADMINISTRATION AND IMPLEMENTATION

Overall, EDs commended CompassPoint's administration of this pilot project. In their interviews, EDs had several comments and suggestions that may be relevant for any future projects:

- An in-depth description of what coaching is and an introduction to coaching at the beginning of the project would be useful.
- Guidance to EDs on selecting a coach, including criteria to consider and strategies for interviewing a prospective coach, would be helpful.
- Both telephone and in-person meetings between EDs and coaches have advantages and disadvantages, but EDs should meet with their coaches face-to-face at least some of the time.
- An allotment of 40 hours for coaching is sufficient.
- The project administrator's attention to communication and follow-through is important for smooth operations.
- EDs had a variety of responses regarding whether and how the EDs and their organizations should split the cost of coaching; some EDs felt that they gained ownership over the process by contributing some money out of pocket, whereas others felt their organizations should pay the full cost.
- EDs nearly unanimously agreed that the most important and valuable aspect of the roundtables was the opportunity to meet, network, and share experiences with other EDs, and future roundtables should incorporate this element.

DISCUSSION AND RECOMMENDATIONS

DISCUSSION

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. Several EDs 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. In addition, some EDs' personal lives improved, as did their ability to balance their personal and professional lives. They increased time for themselves, improved relationships with family and friends, and implemented regular exercise plans.

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. It is noteworthy that coaching, an "intervention" targeted toward individuals, had an impact on organizations. It appears that the skills and insight EDs developed through coaching made them better leaders, which in turn strengthened organizational capacity. This organizational impact was achieved via three specific mechanisms: 1) EDs changed the way they approached their work as a result of coaching, 2) EDs themselves acted as coaches to their staff and Board members, and/or 3) EDs invited their coaches to work directly with their staff and Board.

One area in which coaching had an impact is in ED tenure and turnover. The Executive Coaching Project aimed to 1) increase the length of time that EDs remain at their organizations and in the nonprofit sector overall, and/or 2) improve the fit between the ED and his or her job, even if it results in the ED leaving a position or the nonprofit sector. This coaching project appears to have led some EDs down the first path and some down the second. For example, a few EDs indicated in their interviews that coaching led them to stay longer in their jobs than they would have without coaching. In contrast, the insight gained through coaching led some EDs to question whether the job was right for them. Some even began to strategize to ensure that they passed a healthy organization on to their successors as part of their exit planning. One ED left his job shortly after his coaching ended and asserted that he would have left earlier without coaching. Anecdotally, he subsequently secured another ED position in the nonprofit sector, although it is unclear to what extent coaching had an influence on his decision to remain in the sector. In addition, he plans to retain his coach to assist him with the transition to his new job. In summary, coaching appears to have an influence on some EDs regarding their tenure. Further research is needed to assess the long-term impact of coaching on retaining leadership talent in the nonprofit sector.

Another noteworthy finding is that, on the survey, the magnitude of improvement in many areas was greater during the first six months of coaching compared with the second six months. This observation suggests a strong immediate effect of coaching in the beginning, an effect that dissipates somewhat as coaching continues. Despite this effect, coaching continues to have enormous benefit over time, according to comments EDs made in their interviews and as evidenced by the continued use of coaching by several EDs after the end of the project. Therefore, interpreting this finding to mean that coaching should only be offered for six months is an oversimplification, as the period after the first six months may be critical for deepening the learning and creating sustainable practices, even if improvement is occurring on a slower trajectory.

Two areas explored in the evaluation had mixed findings that lead to questions about whether it is reasonable to expect change in those areas as a result of coaching: 1) job stress, and 2) relationship with Boards of Directors. Job stress is influenced by so many factors that it is challenging to determine whether or how coaching affects it, or whether the concept of stress is an appropriate framework in the context of coaching (e.g., coaching may deal with this issue as self-care as opposed to stress). Therefore, job stress may not be a good indicator of coaching success. Likewise, because EDs and Boards were not usually coached together as part of this project, improved Board relations may not be a reasonable expectation and thus also not an appropriate indicator of coaching success.

In the areas where coaching was successful, contributing factors that were not explicitly mentioned by EDs were ED dedication to the process and outcomes of coaching and their openness to personal development and change. In their interviews, most EDs demonstrated a strong commitment to themselves and their organizations by taking time for coaching appointments, conscientiously working on exercises between meetings as instructed by their coaches, and celebrating and building on their accomplishments along the way. This observation has implications for selection of EDs for participation in coaching projects. Coaching likely would not result in any dramatic outcomes if the ED does not demonstrate a certain level of commitment. Therefore, a thorough explanation of coaching to potential ED participants and an assessment of their readiness to commit to participating fully in the experience may be useful in the selection process.

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

RECOMMENDATIONS

The following are recommendations for future coaching projects based on the findings from this evaluation.

Recommendations to Coaches and Project Administrators

- Develop a thorough and clear orientation to coaching and coach selection processes to ensure that EDs are fully informed about their options as well as criteria to consider in choosing a coach.
- Support EDs in developing realistic expectations about what can be accomplished through coaching. For example, coaching focuses on EDs’ resources and actions, assisting them with actualizing their goals, and not on technical expertise.
- Design group sessions or roundtables for participants that have as their primary focus ED networking and sharing of experiences.
- During coach selection, consider that newer EDs may have unique needs, which may include the need to develop particular technical skills (e.g., fund development, strategic planning). Establish protocols for coaches at the outset regarding how and when coaches should move to a more tutorial role to help EDs develop such skills in the context of coaching.

- Ensure that coaches assess individual ED needs at the beginning of the project and throughout, adjusting the coaching along the way. Coaches and project administrators should take note of “turning points” during coaching (which may occur around the six-month mark) that may indicate a need to shift the focus from developing skills and approaches to sustaining them.
- When possible, include chances for peer networking among coaching participants in order to reinforce and enlarge the coaching outcomes. Periodic coachee convocations can also be an opportunity for the project administrators to get feedback important to improving the service.
- Consider coaching the ED and Board members jointly if one of the ED’s goals is to improve their relationship with the Board.

Recommendations for Future Coaching Research and Evaluation

- Include a longitudinal component and a comparison group in the evaluation design to look at the long-term impacts of coaching (e.g., Do EDs who participated in coaching remain in the nonprofit sector longer than EDs who were not coached?).
- Explore the ways in which coaching contributes to changing nonprofit culture.
- Document how nonprofit coaching differs from corporate coaching and identify the critical components of nonprofit coaching.

SECTION II: Please indicate your level of agreement with the following statements.

7. Overall, I work effectively with the Board of Directors.

1 2 3 4 5
Strongly Disagree Strongly Agree

8. I have a good relationship with the Board of Directors.

1 2 3 4 5
Strongly Disagree Strongly Agree

9. Overall, I work effectively with my staff.

1 2 3 4 5
Strongly Disagree Strongly Agree

10. I have a good relationship with my managers and other staff that report to me.

1 2 3 4 5
Strongly Disagree Strongly Agree

SECTION III: Please indicate your level of confidence in the following areas.

11. Ability to exercise leadership on a daily basis.

1 2 3 4 5
Not Confident At All Very Confident

12. Ability to exercise leadership in the face of challenges and obstacles.

1 2 3 4 5
Not Confident At All Very Confident

13. Ability to resolve conflicts within the organization.

1 2 3 4 5
Not Confident At All Very Confident

14. Ability to move the organization toward achieving its goals.

1 2 3 4 5

SECTION IV: Please indicate your level of agreement with the following statements.

15. The organization has a clearly defined mission statement.

1	2	3	4	5	6
Strongly Disagree				Strongly Agree	No Mission Statement

16. The staff, the Board, and I are aligned with the organization's mission statement.

1	2	3	4	5	6
Strongly Disagree				Strongly Agree	No Mission Statement

17. I have a clearly defined vision for where the organization is headed.

1	2	3	4	5
Strongly Disagree				Strongly Agree

18. The organization has clearly articulated strategies or action plans for achieving its goals.

1	2	3	4	5
Strongly Disagree				Strongly Agree

19. The organization has a clearly defined decision-making process.

1	2	3	4	5
Strongly Disagree				Strongly Agree

20. The organization has written policies and procedures.

1	2	3	4	5
Strongly Disagree				Strongly Agree

21. The organization's personnel policies include a clearly defined grievance procedure for staff.

1	2	3	4	5
Strongly Disagree				Strongly Agree

22. The roles and responsibilities of all staff positions are clearly defined.

1	2	3	4	5
Strongly Disagree				Strongly Agree

Strongly Disagree

Strongly Agree

SECTION IV: Please indicate your level of agreement with the following statements.

15. The organization has a clearly defined mission statement.

1 2 3 4 5 6
Strongly Disagree Strongly Agree No Mission Statement

16. The staff, the Board, and I are aligned with the organization's mission statement.

1 2 3 4 5 6
Strongly Disagree Strongly Agree No Mission Statement

17. I have a clearly defined vision for where the organization is headed.

1 2 3 4 5
Strongly Disagree Strongly Agree

18. The organization has clearly articulated strategies or action plans for achieving its goals.

1 2 3 4 5
Strongly Disagree Strongly Agree

19. The organization has a clearly defined decision-making process.

1 2 3 4 5
Strongly Disagree Strongly Agree

20. The organization has written policies and procedures.

1 2 3 4 5
Strongly Disagree Strongly Agree

21. The organization's personnel policies include a clearly defined grievance procedure for staff.

1 2 3 4 5
Strongly Disagree Strongly Agree

22. The roles and responsibilities of all staff positions are clearly defined.

1 2 3 4 5
Strongly Disagree Strongly Agree

1
Strongly Disagree

2

3

4

5
Strongly Agree

SECTION II: Please indicate your level of agreement with the following statements.

7. Overall, I work effectively with the Board of Directors.

1 2 3 4 5
Strongly Disagree Strongly Agree

8. I have a good relationship with the Board of Directors.

1 2 3 4 5
Strongly Disagree Strongly Agree

9. Overall, I work effectively with my staff.

1 2 3 4 5
Strongly Disagree Strongly Agree

10. I have a good relationship with my managers and other staff that report to me.

1 2 3 4 5
Strongly Disagree Strongly Agree

SECTION III: Please indicate your level of confidence in the following areas.

11. Ability to exercise leadership on a daily basis.

1 2 3 4 5
Not Confident At All Very Confident

12. Ability to exercise leadership in the face of challenges and obstacles.

1 2 3 4 5
Not Confident At All Very Confident

13. Ability to resolve conflicts within the organization.

1 2 3 4 5
Not Confident At All Very Confident

14. Ability to move the organization toward achieving its goals.

1 2 3 4 5
Not Confident At All Very Confident

SECTION IV: Please indicate your level of agreement with the following statements.

15. The organization has a clearly defined mission statement.

1 2 3 4 5 6
Strongly Disagree Strongly Agree No Mission Statement

16. The staff, the Board, and I are aligned with the organization's mission statement.

1 2 3 4 5 6
Strongly Disagree Strongly Agree No Mission Statement

17. I have a clearly defined vision for where the organization is headed.

1 2 3 4 5
Strongly Disagree Strongly Agree

18. The organization has clearly articulated strategies or action plans for achieving its goals.

1 2 3 4 5
Strongly Disagree Strongly Agree

19. The organization has a clearly defined decision-making process.

1 2 3 4 5
Strongly Disagree Strongly Agree

20. The organization has written policies and procedures.

1 2 3 4 5
Strongly Disagree Strongly Agree

21. The organization's personnel policies include a clearly defined grievance procedure for staff.

1 2 3 4 5
Strongly Disagree Strongly Agree

22. The roles and responsibilities of all staff positions are clearly defined.

1 2 3 4 5
Strongly Disagree Strongly Agree

SECTION V: Please select the most appropriate response.

23. My work is meaningful.

1 2 3 4 5
Strongly Disagree Strongly Agree

24. My work positively challenges me.

1 2 3 4 5
Strongly Disagree Strongly Agree

25. I feel valued by my staff.

1 2 3 4 5
Strongly Disagree Strongly Agree

26. I feel valued by my Board of Directors.

1 2 3 4 5
Strongly Disagree Strongly Agree

27. How often do you feel “burned out”?

1 2 3 4 5
Never Rarely Sometimes Often Always

28. How often do you feel your job responsibilities are more than you can handle?

1 2 3 4 5
Never Rarely Sometimes Often Always

29. My job-related stress is:

1 2 3 4 5
Very Low Low Medium High Very High

30. There is something out of the ordinary going on in my personal life that is negatively affecting my job satisfaction.

1 2 3 4 5
Strongly Disagree Strongly Agree

- More than four years
- Other (please explain): _____

38. If Compass Point were to offer coaching as a regular service, what improvements would you recommend?

39. Please list any additional comments you may have:

Thank you very much for completing this survey.

APPENDIX 4: EXECUTIVE DIRECTOR INTERVIEW PROTOCOL

Introduction:

My name is _____ and I'm calling from Harder+Company Community Research, the evaluator for Compass Point's Executive Director Coaching Project. I'm working with Aimee on the project. Is now still a good time to talk? As I mentioned, today's interview should take about 45 minutes to 1 hour. The purpose of today's interview is to ask you to reflect on the successes and challenges around your coaching experience and to talk about your satisfaction with the coaching program. Your responses will be kept confidential and shared only with the Harder+Company project team. Transcripts of interviews will not be shared with Compass Point or anyone else. No one except Harder+Company will be able to trace your comments back to you. Do you have any questions before we begin?

1. Think back to when you first heard about Compass Point's ED Coaching Project.
 - A. Why did you decide to enroll?
 - B. What did you hope to achieve for yourself through coaching?
2.
 - A. What was your understanding of coaching before you began your coaching sessions? (Prompt: What were your expectations for coaching?)
 - B. Now that your coaching experience through Compass Point has come to an end, in what ways did it meet or exceed your expectations?
 - C. In what ways did your coaching experience not fulfill your expectations?
3. In your learning contract, you prioritized the following areas....(tailored to each ED).
 - A. What successes and achievements have you had in each of these areas?
 - B. How did your coaching experience facilitate those successes?
 - C. In what areas did you have less success?
4. What unexpected learning or growth have you had that you did not set out in your learning contract?
5.
 - A. How has your coaching experience affected your job satisfaction, if at all?
 - B. How has your coaching experience affected your level of burnout, if at all?
6. How has your coaching experience influenced your career aspirations?
7.
 - A. How has your coaching experience affected your personal life, if at all?

- B. How has this impacted your job performance or satisfaction, if at all?
8. A. How did you utilize coaching services in your organization? (Prompts: Did you use coaching hours to work with staff or board? In what areas? Did you use coaching skills/techniques with your staff/Board? How?)
- B. What impact has coaching had on your staff, Board, and the organization as a whole?
9. Did your coach share with you, Board members, or staff information or expertise in any specific technical content areas, such as strategic planning, fundraising, human resources, or anything else? Please describe.
10. A. What new skills, learning, or behaviors you got from coaching do you feel you will sustain after your coaching relationship ends?
- B. What skills, learning, or behaviors you got from coaching will be challenging to sustain without the presence of a coach?
11. CompassPoint would like to be able to offer coaching as a regular component of their services.
- A. Do you think this program should be replicated in the future as a service at Compass Point and/or other organizations?
- B. What areas of improvements would you recommend?
- C. How satisfied were you with the process of selecting and being assigned a coach?
- D. How satisfied were you with the administrative and process aspects of the coaching process? (Prompts: Were your allotted hours sufficient? Were communications with Compass Point efficient and clear? Was the model of some in-person coaching and some telephone coaching effective?)
- E. What, if anything, did the roundtables contribute to your overall coaching experience?
12. If you could sum up your coaching experience in three words, what would they be? (Optional – this might be good for sound bytes, to print in brochures advertising the coaching service, etc.)
13. A. As you probably remember, in this program, the fees for coaching services were \$125/hour, for about 40 hours, for a total of \$5000. Now that you have completed your coaching, was it worth the money?

B. What were the benefits and/or disadvantages of contributing some money out of pocket for your coaching?

C. Is coaching something that you would encourage your organization to invest in for the future?

APPENDIX 5: CASE STUDY INTERVIEW PROTOCOLS

A. INTERVIEW WITH EXECUTIVE DIRECTOR

Introduction:

My name is _____ and I'm calling from Harder+Company Community Research, the evaluator for Compass Point's Executive Director Coaching Project. Is now still a good time to talk? As I mentioned, today's interview should take about 1 hour. Thank you for agreeing to be part of a case study. This means that a 1- to 2-page summary of your coaching experience will appear in the final evaluation report. This summary will reflect information from you, your coach, and the staff or Board member you have recommended we interview, as well as information from your learning contract and coaching logs. No identifying information about you or your agency will appear in the report. We will send you your case study write-up to review for accuracy before it is published.

In today's interview, I will be asking you to reflect on the successes and challenges around your coaching experience and to talk about your satisfaction with the coaching program. Your responses will be kept confidential and shared only with the Harder+Company project team. Transcripts of interviews will not be shared with Compass Point or anyone else; however, Compass Point will know which case study belongs to you. In summary, no one except Harder+Company, and possibly Compass Point, will be able to trace your comments back to you. Do you have any questions before we begin?

1. Think back to when you first heard about Compass Point's ED Coaching Project.
 - A. Why did you decide to enroll?
 - B. Describe the process of selecting your coach. (Prompts: What qualities were you seeking in a coach? How many coaches did you interview? How did you make your final decision?)
 - C. What did you hope to achieve for yourself through coaching?

2.
 - A. What was your understanding of coaching before you began your coaching sessions? (Prompt: What were your expectations for coaching?)
 - B. Now that your coaching experience through Compass Point has come to an end, in what ways did it meet or exceed your expectations?
 - C. In what ways did your coaching experience not fulfill your expectations?

3. In your learning contract, you prioritized the following areas....(tailored to each ED)
 - A. What successes and achievements have you had in each of these areas?
 - B. How did your coaching experience facilitate those successes?
 - C. In what areas did you have less success?
4. What unexpected learning or growth have you had that you did not set out in your learning contract?
5. Select one of the big themes or issues you dealt with in coaching that had to do with something you wanted to work on for yourself, either personally or professionally. This could be a goal you had or something you worked on over the course of coaching.
 - A. First, describe the theme or issue.
 - B. How did you work through this issue with your coach? (Prompts: What techniques or processes did you and your coach put into place to deal with the issue? What were the successes and challenges along the way? How did you work through the challenges?)
 - C. What was the ultimate outcome of working on this issue?
6. Think about a challenge your organization faced over the last year.
 - A. First, describe the challenge.
 - B. How did you work through this organizational issue with your coach? (Prompts: What techniques or processes did you and your coach put into place to deal with the issue? What were the successes and challenges along the way? How did you work through the challenges?)
 - C. What was the ultimate outcome of working on this challenge?
6.
 - A. How has your coaching experience affected your job satisfaction, if at all?
 - B. How has your coaching experience affected your level of burnout, if at all?
7. How has your coaching experience influenced your career aspirations?
8.
 - A. How has your coaching experience affected your personal life, if at all?
 - B. How has this impacted your job performance or satisfaction, if at all?

9. A. How did you utilize coaching services in your organization? (Prompts: Did you use coaching hours to work with staff or board? In what areas? Did you use coaching skills/techniques with your staff/Board? How?)
- B. What impact has coaching had on your staff, Board, and the organization as a whole?
10. Did your coach share with you, Board members, or staff information or expertise in any specific technical content areas, such as strategic planning, fundraising, human resources, or anything else? Please describe.
11. A. What new skills, learning, or behaviors you got from coaching do you feel you will sustain after your coaching relationship ends?
- B. What skills, learning, or behaviors you got from coaching will be challenging to sustain without the presence of a coach?
12. Compass Point would like to be able to offer coaching as a regular component of their services.
- A. Do you think this program should be replicated in the future as a service at Compass Point and/or other organizations?
- B. What areas of improvements would you recommend?
- C. How satisfied were you with the process of selecting and being assigned a coach?
- D. How satisfied were you with the administrative and process aspects of the coaching process? (Prompts: Were your allotted hours sufficient? Were communications with Compass Point efficient and clear? Was the model of some in-person coaching and some telephone coaching effective?)
- E. What, if anything, did the roundtables contribute to your overall coaching experience?
13. If you could sum up your coaching experience in three words, what would they be?
14. A. As you probably remember, in this program, the fees for coaching services were \$125/hour, for about 40 hours, for a total of \$5000. Now that you have completed your coaching, was it worth the money?
- B. What were the benefits and/or disadvantages of contributing some money out of pocket for your coaching?
- C. Is coaching something that you would encourage your organization to invest in for the future?

B. INTERVIEW WITH BOARD AND STAFF MEMBERS

Introduction:

My name is _____ and I'm calling from Harder+Company Community Research, the evaluator for Compass Point's Executive Director Coaching Project. Is now still a good time to talk? As I mentioned, today's interview should take about 20 to 30 minutes. Thank you for agreeing to be part of a case study for [ED]. This means that a 1- to 2-page summary of [ED's] coaching experience will appear in the final evaluation report. This summary will reflect information from you, [ED], and his/her coach, as well as other written information. Names will not be included in the report. We will send the case study write-up to [ED] to review for accuracy before it is published.

In today's interview, I will be asking you to reflect on the growth you've observed in [organization] and how [ED] has helped facilitate that growth. Your responses will be kept confidential and shared only with the Harder+Company project team, although your comments will be incorporated into the case study write-up and [ED] may be able to infer what you said. Transcripts of interviews will not be shared with Compass Point or anyone else. Do you have any questions before we begin?

1. Tell me about your familiarity with coaching in general and the coaching project that [ED name] was involved in this year.

2. How do you think [organization name] has changed or grown in the last year? (Prompts: How has its direction or focus changed or shifted? How have staff or Board changed or grown regarding their roles, skills, communications, commitment to the work of [organization name], or anything else?)

3. So you mentioned changes in the areas of x, y, and z.
 - A. What change or growth in [ED's] leadership skills have you noticed that helped facilitate these organizational changes?

 - B. What change or growth in [ED's] management skills have you noticed that helped facilitate these organizational changes?

 - C. What change or growth in [ED's] interpersonal communication skills have you noticed that helped facilitate these organizational changes?

4.
 - A. Over the last year, what external factors have influenced your organization's situation?

 - B. How has the ED dealt with these factors?

 - C. Did you observe any differences in the way the ED dealt with these factors, compared with how he or she might have dealt with them before coaching?

5. A. Compared to a year ago, how would you characterize the state of your organization? Consider both the internal organizational issues and the external factors that influence your organization's situation. (Prompt: As an organization, are you better off, less well-off, or the same?)
6. Have you worked with [ED's] coach? If yes, what did you learn from that experience?
7. (Board members only)
 - A. Are you familiar with the fees for coaching services? In this program, the cost was \$125/hour, for about 40 hours, for a total of \$5000. Were the results you observed worth the money?
 - B. Is coaching something that you would encourage your organization to invest in for the future?