



ONLINE TOOLKIT

Coaching Stories

James Kass is executive director of Youth Speaks, a San Francisco literary arts organization that received a grant from James Irvine Foundation's Fund for Leadership Advancement in 2008. Kass used the funds for coaching as well as enrollment in a Stanford University program for arts executives.

Kass said he met face-to-face with his coach at the start of the engagement. After that, they conducted weekly or biweekly phone conversations, with face-to-face meetings every few months.

One of the key benefits of the coaching, according to Kass, was having a forum where he could connect the content of the Stanford program to the day-to-day issues facing Youth Speaks. "I found the coaching created a place where I could work with someone to bounce ideas back and forth about what I was learning and how to apply it", he said.

Kass also valued coaching because of the simple fact that it provided someone to talk to who wasn't a member of his organization's staff or board. "Executive directors can be in an isolated position, so this was someone I could raise tough issues with that I couldn't raise with my colleagues".

At the time he was being coached, Youth Speaks was going through a number of changes – Kass called them "growing pain issues". He said his concerns included everything from financial challenges facing the organization to staff and board transitions and more. The coach, he said, "really helped me clarify both what the challenges were and how to think about addressing them".

Kass credits the coaching he received with helping him forge a new approach to the organization's leadership, which resulted in creating an executive management team and hiring Youth Speaks' first managing director. He said that the board of Youth Speaks has also changed, doubling in size and increasing its involvement with the organization.

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Sue Carter received coaching through the Fieldstone Foundation's Coaching Network while she was a program manager and subsequently program director with the Girl Scouts in San Diego. Then, when she became executive director of Volunteer San Diego, she worked with the Fieldstone Foundation to arrange a second year of coaching. She said the coaching was especially valuable in helping her grow into her executive director position.

“The new job meant I had to work more closely with the board than I was used to, and I had to play more of an ambassador role for the organization in the community. Coaching helped me peel back the layers of the job and gave me the validation I needed to take on these new responsibilities with new confidence,” she said. “I was in a much more prominent and visible role than I had ever been in before, and coaching helped me find a comfort zone in that.”

Carter has since become a coach in the Fieldstone Foundation’s Coaching Network, which trains nonprofit leaders to serve as coaches in peer-to-peer engagements.

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Shelley Hoss and her leadership team worked with a coach when Hoss was redefining her role and responsibilities as executive director of the Orange County Community Foundation in Irvine, California.

The foundation had just completed work on a new strategic plan that would require Hoss to play a more external role in the community. As a result, she would have to delegate more responsibilities for day-to-day operations to her direct reports. Using grant funds from the James Irvine Foundation, she and her colleagues worked with a coach to explore how to create a strong executive team.

Over a period of 18 months, the coach visited the community foundation offices once a month for individual meetings with team members, followed by a group meeting over lunch. In their initial work with the coach, Hoss and her colleagues began to map out how the team would work together, and who would be responsible for what.

Another priority for coaching was how to ensure that Hoss would have the freedom and peace-of-mind to step out of many of her previous responsibilities. “I knew what needed to happen, but I had a lot of anxiety about losing control of all the day-to-day, given that I would still have the ultimate responsibility for what happened,” Hoss said.

The leadership team also worked with the coach to address style differences that might inhibit their capacity to work together effectively.

Hoss said coaching has helped her realize her vision of a “fully competent leadership team that can function with or without me.” As a result, she has now stepped out of almost all daily operating responsibilities and is actively engaged in advancing the foundation’s external role in the community and its field. Hoss currently serves as board chair of the League of California Community Foundations, which she says is something she never would have contemplated before working with a coach.

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Following the retirement of a long-time executive director in 2004, Lindsey Buss took the top job at Martha’s Table, a Washington, D.C., nonprofit that provides food, clothing, educational programs and enrichment opportunities to children, youth and families.

Buss identified a need for significant changes at the organization — and he used a coaching grant from the Eugene and Agnes E. Meyer Foundation to help him plan how to make those changes.

“We needed to professionalize,” he said, noting that the organization had evolved from a “mom-and-pop” operation to an entity with a staff of 70. At the start of his tenure, it was Buss himself who had to call repair people to deal with everything from clogged toilets to air conditioning problems. “We needed more internal controls and more infrastructure, and I knew it would be a struggle.”

Buss said he found his coach based on the recommendation of a friend at another nonprofit. “I interviewed several coaches and it really came down to my comfort level with this person,” he said. “I really wanted to hit the ground running, so it was important for me to find someone I was comfortable with, and someone I felt would understand the peculiar aspects of this organization and where we were at the time.”

Buss and his coach met in person once per month over a period of a year, with phone calls between meetings on an as-needed basis. During the coaching engagement, Buss said his coach allowed him to keep a “big-picture view” of the challenges facing Martha’s Table and what he and the staff needed to do. “There were so many things going on in the organization that it helped to keep checking in about the key issues and where we were going,” he said.

Among the key organizational issues that coaching helped Buss address was the need to foster a culture of collaboration. “We have such a wide range of services and we’re physically spread out, so there is a tendency to operate in silos,” he said. Through his coaching, Buss said he was able to consider and implement new ways of improving communications across the organization.

In addition, as a first-time executive director, Buss said his coach provided an outlet for him to air frustrations and raise questions that he couldn’t raise with his staff or board members. “This was an opportunity for me to talk about what was driving me crazy during the day or week or month that we met. It wasn’t just about blowing off steam but allowing me to really think about these issues and find some tools and strategies for dealing with them.”

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As Girls Incorporated of Alameda County (California) prepared for the exit of long-time executive director Pat Loomes and the transition to new leadership, the organization used grant funds from the Evelyn and Walter Haas, Jr. Fund to pay for leadership coaching for the board and staff, plus consulting and training in fund development, succession planning, governance and other crucial areas.

“The coaching made it so we had a vehicle to discuss things, a shared experience in some ways that helped us be on the same page,” Loomes said.

She added that she and her colleagues interviewed as many as eight candidates before settling on a coach who worked on a one-on-one basis with Loomes, as well as with the Girls Inc. leadership team as a whole.

The team coaching helped the organization use the transition period to clarify its strategic priorities and vision, while bolstering board and staff capacity to expand Girls Inc.’s funding base.

For Loomes, the coaching provided an opportunity to wrestle with some of the conflicting emotions she was feeling in leaving an organization she had been with for 30 years.

“It was my decision to retire but that doesn’t mean there weren’t feelings of sadness and concern about being kind of a lame duck,” she said. “Having a coach provided a chance for me to come to terms with those feelings while also figuring out the very practical things I needed to do to make sure I left Girls Inc. in as good a position as possible.”

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Lynette Worden, who works with Planned Parenthood Mar Monte in Roseville, California, said working with a coach was “the main highlight” of her participation in the Blue Shield of California Foundation’s Clinic Leadership Institute. “I got partnered with somebody I really connected with,” she said. “It’s opened my eyes to what a leader can be.”

Worden is not alone in citing coaching as a crucial element of the Clinic Leadership Institute, whose mission is to prepare emerging leaders of California community clinics and health centers to be “effective and passionate agents of change in today’s evolving healthcare environment.” Interim evaluations of the first year of the institute found that participants already were expressing “considerable appreciation for and satisfaction with” the coaching they received. According to the evaluation, “coaches challenge participants and support them in taking action to confront barriers and further develop their leadership.”

According to the foundation’s director of health care and coverage, Brenda Solórzano, the institute considered coaching a crucial programming element from the start. “We recognized that these emerging leaders often do not have a confidential place where they can go to explore the things they need to be thinking about and doing as they advance in their careers,” she said.