

# ESCCO Organizational Coaching for Nonprofits

## What is Organizational Coaching?

Many are familiar with the role of coaching for a youth sports team or even the coaching of an individual executive where the coach's role is to facilitate the growth in capabilities and accomplishment of the individual or team. The coach provides experience and perspective that engages and encourages success. ESCCO has applied these concepts to create the unique position of organizational coach.

This coaching role can provide real value to a motivated, mission focused nonprofit whose leadership senses a gap between where they are and where they would like to be. Guiding the nonprofit, the Organizational Coach will interact with both board and staff.

## ESCCO's Approach to Organizational Coaching

ESCCO's staff will meet initially with the organization's leadership to develop an understanding of the issues the organization is facing and the gaps it wants to tackle.

ESCCO will identify a candidate for the coaching assignment and arrange an initial meeting with the client organization to see if it is a compatible match.

Throughout the entire engagement, it is important to recognize that any counsel or guidance offered by ESCCO is provided in the spirit of assisting the nonprofit achieve its own objectives as articulated by its leadership.

## Scope of the ESCCO Engagement

Before any assignment starts, there will be a brief written agreement between ESCCO and the client identifying:

- Specific organizational objectives
- Participation of ESCCO Coach at board meetings, executive committee meetings, etc.
- Planned duration of the assignment
- ESCCO's Fee

## Project History

ESCCO has completed two Organizational Coaching projects and a third is underway.

Junior Hospitality is a long-standing organization made up of younger women who have provided service and funding to the nonprofit community. In an era of change, they found themselves burdened by complex bylaws and traditions, and with ownership of a valuable clubhouse. ESCCO's Organizational Coach met with them regularly, including board meetings and general membership meetings, and provided guidance to complete the sale of the clubhouse and put them in a position where they can disband or continue in a new modality.

CityRep is an Actor's Equity theater company facing future leadership transition, a need for Board development, and funding issues. ESCCO's Organizational Coach spent time with staff and board, helping them identify options to assure their future.

Manos Juntas is a free clinic serving people with access only to the bottom tier of health care, due to lack of insurance, poverty, and immigration status. Their founding doctor has provided 60% of their funding and will be retiring this year. ESCCO has just paired them with a volunteer consultant with an exceptional background in clinic health care for the impoverished. They will be working together to develop a transition plan.

## ESC-US Peer Call – Coaching – March 21, 2019

Participants – Moderator, Jody Yetzer-OneSource Cincinnati; Recorder, Paul Moore-ESC Central OK, Darlyne Koretos- ESC-US, Craig Kowalski- ESC-US Vickie Ciotti-Cincinnati, Ellen Brown- NESC Hartford, Jim Rather- ESC Houston, Miles Robinson- ESC Boston, Julie Crockford- ESC Boston, Julia Fischer -ESC Los Angeles, Lilly Hogel- ESC Los Angeles, Michael Towers- NESC. Requests are underlined.

**1. Does your affiliate conduct an assessment/discovery meeting with a client before the client engages your affiliate for a coaching project?**

Julie/Boston – Initially Director (Miles) assesses the coaching needs then selects volunteer he thinks would be a good fit and coach-volunteer have a “mutual scoping” call;

Julia/LA – VP or Director of Consulting does “deep dive” intake followed by a “match meeting” between client and the prospective coach, looking for chemistry.

If there is a performance issue, the meeting is more formalized the supervisor is involved in the initial match conversation together with VP or Director to review objectives etc.; Craig/Cincinnati asked how we determine what outcomes the coachee hopes for.

Julia – Asks “in a year from now, what do you hope will be different?” Checks on gender preference, ethnic preference etc. by the coachee.

LA is doing more coaching of mid-level coachees, so the template has varied a bit.

Jody asked Julia to send the template that they use and she will share it.

**2. Does your affiliate price different kinds of coaching projects differently? If so, how?**

Cincinnati prices CEO coaching differently from those down in the ranks. Paul described ESCCO’s Organizational Coaching model and price (\$5000/\$2500-\$3000 for ED coaching). He was asked to put together a case study/description. LA spends a year, twice monthly, usually for \$3500. ESCCO’s regular rack rate is \$2500 but often charges less. Boston is priced lower than that.

**3. If your affiliate offers ED and/or individual employee performance improvement coaching, are any special measures taken to address conflicts that may arise from the fact that the client is or may be different from the coachee?**

Paul shared his belief that sometimes coaching someone out of their current job can be the best thing you can do for the person and the organization that currently employs them. Darlyne has also had that experience. Jody wondered whether there was a legal liability; Paul said it should probably be addressed on the front end. Jody said they have several development programs that include a coaching match. Julia LA’s EDLI and DDP programs both include classroom sessions with the assigned coaches attending and working beyond the classroom sessions (cohort model, year-long program). Julia would rather not have their volunteer coaches have what might be a negative experience of “coaching someone out.”

**4. How does your affiliate assure quality coaching? E.g., are coaches trained/accredited? How are they selected for assignment?** Julie said they do not have an expectation of

certification in Boston. They do sometimes look for someone with technical expertise that would help in the match. Julia LA does not look more favorably on one certification than another. They do offer training in coaching skills. They have certified staff. Craig asked if they expect refresher training. Julia LA said they do have such expectations. Julia LA went through a six month course and then practical hours with review of tapes. Jody asked if the matchmaking is being done in-house by staff: LA, OKC. Jim said they have several qualified coaches but have not had recent requests. He interviewed a potential client for second-level coaching but the ED could not get board approval. There were ethnic and gender match expectations which were a difficult requirement to meet. Paul described ESCCO's redirection to using current and former nonprofit CEO's exclusively as their coaches, and the success that has come as a result.

5. **What measures are taken to ensure confidentiality of the coaching process? Have you had any problems and what has been done to rectify them?** Julia LA has a document which is reviewed in the match meetings, and can provide a copy. If there is a supervisor involved they are advised of the boundaries. They've not asked for specific signoffs on that. They like Cincinnati's approach using a Confidentiality Agreement.

Jody asked for feedback on scope and also on final reports. Julia LA does not use formalized deliverables but they do check-ins with coach and coachee, and a call after end-of-engagement as an assessment.

Julia asked if anyone is doing coaching other than face to face. Julie said they start in person but often move to phone, depending on location. Craig said face-to-face seems to work best.

Jody asked whether certified vs non-certified gives an edge over competitors. Julia thinks their clients are unaware of certification. We are more likely to focus there than the client is. Julie said she's not had a client ask. Craig says they're ESC-trained and that seems to be enough.

Julia mentioned that they are sometimes coaching several individuals simultaneously in the same organization, and she has been bringing the several coaches together for some discussion.

Jody expressed appreciation as did several others, including people new in their roles (Vickie/Cincinnati). Darlyne said the next call will be on May 16<sup>th</sup>, 2:30 Eastern, and she will entertain requests for the next call topic. Jody said there is some interest in copyright issues in their affiliate.

**SCOPE OF WORK**  
**for**  
**ORG NAME**  
**Engagement Start Date – Engagement End Date**

**Project Type:** Leadership Coaching

**Project Period:** 12 months

**Coachee:** FIRST/LAST NAME, TITLE

**Approach:** Assignment of a trained ESC executive coach in a confidential working relationship customized to meet NAME's individual needs and enhance the leadership capacity of ORG NAME. Key components of the project include:

- ◆ The support of a dedicated, objective, knowledgeable strategic thought partner to help develop new skills, knowledge and approaches
- ◆ Assistance evaluating and prioritizing NAME's activities and initiatives to effectively address diverse leadership and management roles
- ◆ Assistance in considering strategic business decisions, prioritizing opportunities, and pursuing tactics to implement ORG NAME's strategic vision
- ◆ In-depth focus on key areas of leadership responsibility to improve personal and organizational effectiveness that might emphasize:
  - Management techniques, systems and organizational infrastructure necessary to ensure policies, procedures and operations commensurate with ORG NAME's evolution
  - Decisions and execution of actions to instill a professional and accountable organizational culture and effectively manage organizational change
  - Strategies and actions to optimize the use of resources (programmatic, financial, staff and volunteer) in alignment with ORG NAME's goals, needs and opportunities
  - Optimization of Board practices and decision-making regarding organizational initiatives and opportunities, support for current operations, and promotion of ORG NAME's long-term sustainability and strategic growth
  - Effective stewardship of relationships with prospective supporters and collaborators, including Board engagement as ambassadors for ORG NAME and partners in ORG NAME's fund development activities
- ◆ Identification and prioritization of issues for focus beyond the scope of this particular ESC coaching engagement that ESC or other external resources might support
- ◆ Advisory resource to help NAME sustain the use of new approaches and skills, maximizing the developmental benefit to NAME and organization
- ◆ Periodic project support check-in by ESC staff

**Consultant Plan:** Meet with client an average of 60 – 90 minutes twice a month for entire engagement, with occasional emails/phone calls between sessions

**Project Fees:** AMOUNT (half due at project inception and half due at project conclusion)