



ONLINE TOOLKIT

# Competency Guidelines for Coaches Working in the Nonprofit Sector

A Project of the Coaching and Philanthropy Project

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# Competency Guidelines for Coaches Working in Nonprofit Sector

## INTRODUCTION

The CAP Project recognized that there were no studies showing the context and skill competencies needed for coaches to be effective in the nonprofit sector. Although we could not undertake a thorough study of this subject, we did want to start to look at what background and training is needed for coaches to be effectively supporting nonprofit leaders. We expect that coaches can begin to understand what training and understanding is needed before beginning a career as a nonprofit coach. We also expect that this information will be valuable to those looking to create specialized coaching training for nonprofit coaches.

We identified 70 coaches who have extensive experience in nonprofits and who also have strong background and training in coaching and developed a survey (see Appendix 1 for the survey questions) to find out what specific skills they have and believe are vital for a coach working with nonprofit leaders. Of the 70 surveys sent, we received 36 completed surveys. The information below is a compilation of the results from these surveys.

## SURVEY RESPONDENTS

### Coaching Experience and Background

Coaches completing the CAP Survey have extensive coaching experience and have earned a variety of coaching credentials. In addition, the coaches surveyed have served nonprofits in a variety of roles.

### Coaching Credentials and Experience

The coaching field offers two kinds of recognition. Certification refers to completion of a coaching training program, and accreditation is given by a professional organization and includes both a coach's training as well as actual coaching experience and other education.

### Coaching Experience

| Number Years Coaching |                  |                |
|-----------------------|------------------|----------------|
|                       | Response Percent | Response Count |
| Less than 2 years     | 0%               | 0              |
| 2-5 years             | 11%              | 4              |
| 5-10 years            | 36%              | 13             |
| <b>Over 10 years</b>  | <b>53%</b>       | <b>19</b>      |

## Coach Training

| Sources of Coaching Training |                  |                |
|------------------------------|------------------|----------------|
|                              | Response Percent | Response Count |
| <b>Coaching school</b>       | <b>71%</b>       | <b>25</b>      |
| Academic institution         | 22%              | 8              |
| No formal training           | 5%               | 2              |

| Sources of Credentials  |                  |                |
|---|------------------|----------------|
|   | Response Percent | Response Count |
| Credentialed through the International Coach Federation (ICF) | 36%              | 13             |
| Credentialed through an institution other than ICF            | 22%              | 8              |
| <b>Not credentialed</b>                                       | <b>47%</b>       | <b>15</b>      |

| Level of International Coach Federation Credential  |                  |                |
|---|------------------|----------------|
|   | Response Percent | Response Count |
| ACC (Associate Certified Coach) requires training plus 100 of coaching experience                 | 23%              | 3              |
| <b>PCC (Professional Certified Coach)</b> requires training plus 750 hours of coaching experience | <b>39%</b>       | <b>5</b>       |
| <b>MCC (Master Certified Coach)</b> requires training plus 2500 hours of coaching experience      | <b>39%</b>       | <b>5</b>       |

## Prior Experience in Nonprofit Sector

| Number of Years Coaching in the Nonprofit Sector |                  |                |
|--|------------------|----------------|
|  | Response Percent | Response Count |
| Less than 2 years                                | 0%               | 0              |
| 2-5 years  | 17%              | 6              |
| <b>5-10 years</b>                                | <b>56%</b>       | <b>20</b>      |
| Over 10 years                                    | 28%              | 10             |

| Nonprofit Experience Before Becoming a Coach |                  |                |
|--|------------------|----------------|
|  | Response Percent | Response Count |
| Staff member                                 | 57%              | 20             |
| <b>Board</b>                                 | <b>74%</b>       | <b>26</b>      |
| Volunteer                                    | 69%              | 24             |
| Management/Leadership                        | 71%              | 25             |
| Consultant                                   | 71%              | 25             |
| Other  | 2%               | 8              |

| Percentage of Current Work in the Nonprofit Sector |                  |                |
|--|------------------|----------------|
|  | Response Percent | Response Count |
| <b>Coaching</b>                                    | <b>89%</b>       | <b>32</b>      |
| Consulting   | 61%              | 22             |
| Training and development                           | 53%              | 19             |
| Organizational or team development                 | 53%              | 19             |
| Blended model of one of the above                  | 47%              | 17             |
| Other  | 31%              | 11             |

| Experience as a Consultant with Individuals in Nonprofit |                  |                |
|--|------------------|----------------|
|  | Response Percent | Response Count |
| <b>Previous experience</b>                               | <b>92%</b>       | <b>33</b>      |
| No experience  | 8%               | 3              |

| Nonprofit Coaching Clients' Job Titles |                  |                |
|--|------------------|----------------|
|  | Response Percent | Response Count |
| <b>Nonprofit executives</b>            | <b>92%</b>       | <b>33</b>      |
| Emerging nonprofit leaders             | 61%              | 22             |
| Nonprofit staff                        | 58%              | 21             |

|                                 |     |    |
|---------------------------------|-----|----|
| Nonprofit boards                | 39% | 14 |
| Transitioning nonprofit leaders | 58% | 21 |
| Other                           | 19% | 7  |

| Type of Coaching-Nonprofits |                  |                |
|-----------------------------|------------------|----------------|
|                             | Response Percent | Response Count |
| Life coaching               | 22%              | 8              |
| Career coaching             | 17%              | 6              |
| Organizational coaching     | 50%              | 18             |
| <b>Leadership coaching</b>  | <b>92%</b>       | <b>33</b>      |
| Group coaching              | 31%              | 11             |
| Other                       | 22%              | 8              |

## DEFINITION OF COACHING

Forty-two percent of survey respondents believe coaching is a profession, offered by part or full-time coaches who have or favor formal training and/or certification. The International Coach Federation defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

Seventy-eight percent of the survey respondents believe it is important to be identified as a coach.

Beyond these definitions, coaches use their own words to define coaching. Common threads are woven through coaches' definitions:

- Co-designed partnerships
- Safe, courageous, reflective space
- Present and future focus
- Defining mission and purpose
- Articulation of goals
- Conscious decision-making
- Problem solving
- Identification of obstacles

- Reach potential
- Improve effectiveness
- Exploration of perspectives
- Better utilization of skills
- Uncovering internal answers
- Creation of change

## INFORMATION FOR COACHES

### **Coaching Orientation**

Coaches enter coaching relationships with perspectives that help define the relationship with their clients. In working with nonprofits, survey respondents offer suggestions for the elements of the coaching orientation that is most helpful working with nonprofit leaders.

They cited the need to establish accountability around coaches' fees, the need to enter the relationship with objectivity, and a belief in the client's ability to change their own perspectives. In addition, coaches need an understanding of their own values and biases.

Survey responses regarding the orientation of the coach include:

### **Nonprofit Accountability**

- » Coaches need to hold leaders accountable for the wider impact beyond their immediate organizational focus.
- » Coaches need to be paid for coaching services.

### **Coach Objectivity**

- » Coaches need to be a completely objective pair of eyes and ears that will challenge current culture and context.

### **Changing Perspective**

- » Coaching is about empowerment. The default nonprofit culture is sacrificial and enabling of the status quo. The coach needs to challenge this default perspective.
- » A coach must assist nonprofit clients with enhancing their awareness of assumptions and separating what is within their control and responsibility, as well as what is innate in the nonprofit system.

### **Coach Values**

- » A coach must share the core values of the nonprofit sector: the desire to be part of creating equity and social justice.

- » In order to share core values, the coach must be committed to recognizing that racism, classism, sexism, etc., exist and create inequities. The coach must be aware of her/his own learned biases, internalized beliefs regarding race, class, etc.
- » Coaches need to have emotional intelligence and need to know how to increase this intelligence in their nonprofit clients.

Not all survey respondents believe coaches need a separate coaching orientation when working with nonprofit clients. These comments are:

- » My belief is a coach needs to be a coach in any industry profession or niche. The competencies do not change and all the coaching competencies are necessary to be a masterful coach in this arena.
- » Just as every client needs to understand their client's culture, values and ways of doing business, so it is the case with nonprofits.
- » It's entirely possible that a good coach doesn't need to understand anything about nonprofit culture and context in order to be effective.
- » I have found that understanding everything about nonprofit culture and context is very valuable; on the other hand, sometimes what a nonprofit needs is a completely objective pair of eyes and ears that will challenge current culture and context.

### **Nonprofit Organizational Structure**

Coaches need to understand several areas of nonprofit organizational structure, and they need to understand ways in which nonprofit organizational structure differs from for-profit organizations.

Survey respondents cited an understanding of board governance (61% of respondents), fundraising and finances (44% of respondents), and working with volunteers (17% of respondents) as the most important elements of understanding nonprofit organizational structure.

In addition, they suggested nonprofit coaches understand a nonprofit's mission, the role of the executive director, human relations, organizational change, political savvy, and external trends affecting the nonprofit sector.

## **Nonprofit Board Governance Structures**

*Coaches need to understand:*

- » The relationship between the ED and the Board.
- » Board dynamics, structure and models and how this differs from for-profit organizations.
- » The necessity of involvement and alignment of both organizational leaders and the board in the coaching engagement.
- » The complexity of balancing multiple clients (the leader they are coaching, the board who hires the coach, etc.) and how to work with multiple reporting structures.

Experience as a Board member is helpful for coaches considering work with nonprofits.

## **Fundraising and Finances**

*Coaches need to understand:*

- » Many nonprofits are small businesses and share the same isolation and undercapitalization issues as other small businesses.
- » Nonprofit leaders often think about maximizing impact and minimizing pain, rather than maximizing profit.
- » How funders judge organizational effectiveness.
- » Nonprofit staff members' passion about their work and the ways that their emphasis on relationships can override business perspectives.
- » Nonprofit staff may have little business background.

## **Working with Volunteers**

*Coaches need to understand:*

- » The complex system of the volunteer base and the role of various stakeholders.

Experience as a volunteer is helpful for nonprofit coaches.

## **Nonprofit Mission**

*Coaches need to understand:*

- » The importance of mission as an ultimate criterion that nonprofit leaders use to evaluate strategy, structure, and process.

## **The Role of the Executive Director**

*Coaches need to understand:*

- » Executive Directors must balance the complexity of managing the needs and expectations of clients/members, funders, the board, and the public.
- » For the executive director, stewardship of resources is very important.
- » Many nonprofit leaders will wear more than one hat.
- » How power dynamics work in a nonprofit (examining the role of the Executive Director, the Board, and the Funder).

## **Human Relations/Talent Development/Human Development**

*Coaches need to understand:*

- » Staff can be promoted for their dedication to the cause, not for their competence.
- » Staff can stay on for much longer than they might be tolerated in fast moving for-profits.
- » "Accidental managers" in nonprofits is common.
- » Basic management and leadership education are often not part of a nonprofit culture.
- » Nonprofit leaders may not feel they can hold staff members accountable for excellent performance because they are unable to pay a high enough salary.
- » Many people who work in nonprofits are not primarily motivated by money or status.
- » Capacity to pay is low, and human nature guides individuals to value services based upon what they have paid to obtain those services.

## **Nonprofit Organizational Culture**

In addition to understanding nonprofit organizational structure, coaches need an understanding of the nonprofit culture. Nonprofit coaches need to understand nonprofit motivation, scarcity thinking, the values of nonprofit staff, and staff burnout.

### **Nonprofit Motivation**

*Coaches need to understand:*

- » What motivates most nonprofits: the mission drives the process in nonprofit versus the process drives a competitive edge and financial bottom-line in the for profit sector.
- » There is a "culture" in nonprofits of helping people, righting wrongs, and fixing things that draw particular types of people.
- » There is a unique and marvelous nature of nonprofits and their staffs/boards. On the whole, there are committed and passionate people. The emotions they bring to their jobs are different from for profits.
- » The culture of the particular nonprofit industry: arts are different than social services or environment or legal services.

### **Scarcity Thinking**

*Coaches need to understand:*

- » There is an internalized oppression of many nonprofits that creates a culture of sacrifice and scarcity. This scarcity shows up in how money, resources, and time are used.
- » There is a culture of trying to do good and always coming up short.
- » Nonprofits are usually short staffed.

### **Nonprofit Staff Values**

*Coaches need to understand:*

- » There is a prevailing "culture of nice" that often gets in the way of authenticity.
- » Values are on the table (discussable); money is off the table (non-discussable).

- » Some nonprofits thrive on being the underdog, the anti-something which can make it hard to imagine really excelling and can work against people stepping up to take responsibility for what's going on around them.
- » There can be an aura of caretaking for clients and staff that can keep people from being as strong as they can be on their own behalf.

### **Nonprofit Staff Burnout**

*Coaches need to understand:*

- » Nonprofit professionals feel they work harder and with fewer resources than those in the corporate sector. There is a high level of burnout in the nonprofit sector.
- » There is a tendency to over help and sacrifice one's own health.
- » The culture can be one that goes against saying "no" or making choices at all (since that would entail saying "no").
- » Renewal and recovery for the sustainability of nonprofit leaders is important.
- » Since the mission comes first, it can be very difficult to take care of oneself as a nonprofit leader.

### **Prior Context and Content Knowledge**

Ninety-five percent of respondents offer information on organizational structure, culture, and coaching orientation, while at the same time, seventy-five percent of the survey respondents believe coaches working in the nonprofit sector do not need a background in nonprofits. Twenty-five percent believe a coach needs a nonprofit background.

It seems contradictory that ninety-five percent of survey respondents offer many examples of knowledge coaches need to know about nonprofit organizational structure and culture and then seventy-five percent say nonprofit experience is not necessary.

### **Effective Nonprofit Coaching Skills**

In addition to understanding of nonprofit context and culture, specific coaching skills are needed when supporting nonprofit clients.

## **What skills are needed in effective nonprofit coaching?**

Twenty-five percent of the respondents stated that skills needed to be an effective nonprofit coach are the same skills needed in other sectors.

Basic coaching skills to be effective in the nonprofit sector include: inquiry, listening, challenging, acknowledgement and affirmation, articulation and clarification, and requesting.

### **Specific ways that these basic coaching skills are used with nonprofit leaders:**

#### **Listening**

- » Coaches empower their clients through active listening and partnership.

#### **Challenging**

- » Coaches challenge the leader to take strategic risks to increase their confidence and faith in themselves and others.
- » Coaches challenge leaders to be their best and to break the spell of the default nonprofit culture so they can make social change happen.

#### **Acknowledgement/Affirmation/Advocacy**

- » A coach must be a steadfast advocate for the leader.
- » The coach must create celebration and structures for/with the client to ensure that successes are acknowledged and celebrated by the client, staff and organization as a whole. Celebration is important in showing movement and maintaining/strengthening morale when the nonprofit's goals that may not be achieved in the client's lifetime.

#### **Articulation/Clarification**

- » Coaches must get to the essence of the topic. The coach must get to the bottom line.

Other coaching skills needed for effective work with nonprofit leaders:

#### **Visioning**

- » The coach must support the leader in articulating their highest vision for themselves, for their work, for the "movement".

## **Creating Metaphors**

- » Coaches assist leaders in creating metaphors/symbols/structures: things the client can "hold onto" physically or not. Metaphors can provide clarity and reminder.

## **Accountability**

- » Coaches assist clients in breaking tasks into bits of achievement to enhance and build a sense of movement, of progress.

## **Recognizing Inner Critics**

- » Coaches assist clients in inner critic/"gremlin"/"saboteur" work: heightening awareness of the client's inner critical/negative voice/s.

## **Somatic Awareness**

- » Coaches support clients in somatic awareness: utilizing the physical in service to the client -- using breathing for centering/relaxing, etc, being awareness of body sensations and what they can mean, movement to create a change - in perspective, mood, etc.

## **Holding the Client's Agenda**

- » Coaches can hold the big agenda while focusing on the immediate needs. Nonprofit clients can often be in crisis mode and need reminders of the bigger picture.

## **Other Coaching Skills**

Other coaching skills include negotiation, recommending, reframing, giving feedback, referrals and knowledge, holding clients accountable, serving as a sounding board, sharing stories about other leaders to affirm leaders aren't alone in their struggles, allowing venting, brainstorming, curiosity, patience, and good humor.

## Coaching Training

Besides understanding nonprofit organizational structure and culture, coaching skills and orientation, nonprofit coaches need specific training. Survey respondents recommend twenty-two training areas for coaches to consider.

| Coach Training Needed                            | Response Percent |
|--|------------------|
| Adult learning                                   | 39%              |
| Change management                                | 25%              |
| Nonprofit governance                             | 22%              |
| Organizational development                       | 22%              |
| Leadership                                       | 22%              |
| Assessment tools                                 | 11%              |
|  |                  |
| Same training as needed in any sector            | 8%               |
| Unique characteristics of nonprofits             | 8%               |
| Strong coach training                            | 8%               |
| Funding source training                          | 5%               |
| Project management/Program design                | 5%               |
| Volunteer training                               | 5%               |
| Facilitation/Mediation skill training            | 5%               |
|  |                  |
| Emotional/Social/Political intelligence training | 2%               |
| Diversity training                               | 2%               |
| Nonviolent communication                         | 2%               |
| Group dynamics                                   | 2%               |
| Work/ life balance                               | 2%               |
| Visioning  | 2%               |
| Value clarification                              | 2%               |
| Economic/Community development                   | 2%               |
| Organizing                                       | 2%               |

## Working with Consultants

Eighty-three percent of the survey respondents work with nonprofit clients who are also working with consultants.

Collaboration between coaches and consultants takes various forms:

- » Information sharing about goals and relevant information.
- » Assisting with group coaching design, training, and facilitation.
- » Assisting in working with difficult clients.

- » Three-way meetings to develop consulting/coaching relationships.
- » Regular check-ins.
- » Strategic planning.

Collaboration with consultants takes place at the request of or with permission from the nonprofit leader. Preserving client confidentiality is an important factor when coaches collaborate with nonprofit consultants.

## INFORMATION FOR FUNDERS OF COACHING AND NONPROFIT LEADERS

In order to enhance the value of coaching for nonprofit staff, funders of coaching can begin by creating partnerships with coaches. To facilitate effective coaching partnerships, funders and nonprofits need to understand the issues clients bring to coaching and be able to choose the coaches that serve their staff's needs. For more information for funders and nonprofit leaders, please refer to the Coaching and Philanthropy Action Guides, which can be downloaded at [www.compasspoint.org/coaching](http://www.compasspoint.org/coaching).

Funders need to understand:

- » Coach-supported goal setting methodologies and how progress toward goals is being tracked in the coaching relationship.
- » How coaching skills and practices can be integrated into the culture of the nonprofit organization.
- » How coaches are paid and the range of pay structures.
- » How to set up feedback and reporting loops in order to evaluate the impact of coaching. This includes the role of confidentiality in the coaching relationship.

### Coaching Issues of Nonprofit Clients

Nonprofit coaches report the following issues as those most often brought by nonprofit leaders to the coaching sessions:

| Coaching Issue    | Response Percent |
|-------------------|------------------|
| Work-life balance | 36%              |
| Staff issues      | 67%              |

|                               |            |
|-------------------------------|------------|
| Board issues                  | 56%        |
| <b>Leadership development</b> | <b>81%</b> |
| Fundraising/Fund development  | 8%         |
| Financial goals or challenges | 19%        |
| Managing change               | 53%        |

### **Guidelines for Choosing Coaches**

Coaches recommend the following guidelines for choosing a coach:

- » Look for fit and experience both in the context of nonprofits and in the skills of coaching.
- » Check references and choose coaches who have a track record of doing good work.
- » Ask about the coach's training and certification.
- » Investigate coach's commitment to ongoing growth and training.
- » Interview several coaches before making decisions. Ask for sample sessions.
- » Test the coach: ask all your questions. Don't hold back and don't be polite. Is this coach someone who brings you out, calls you forth, sees the best in the client?
- » Remember conversational rapport is nice but not enough.
- » Look for coaches that can be trusted, who feel supportive, and who help open up perspectives. It usually takes one meeting to make these determinations.
- » Beware of pro bono coaching. It challenges coaching clients to buy in when there might not be a fit.
- » Nonprofit leaders need to use coaching for their own growth and for their organization's effectiveness.
- » Reflect on the domains to be strengthened and select coaches based on their areas of expertise.
- » Look for coaches with management experience who can help the organization articulate the goals for coaching.

- » Look for coaches who can help diagnose what is needed, do a situation analysis and are excellent communicators who can set up an engagement for success.
- » Choose someone with coaching experience beyond consulting.
- » Find a coach who will be very precise in what they offer and propose.
- » Find a coach who will listen to your needs and incorporate your ideas in the planning and implementation processes.

### Setting and Tracking Specific Goals

Ninety four percent of surveyed coaches set specific goals at the beginning of the coaching relationship.

Coaches use various means to track progress on client goals:

- » Client and coach partner to develop the methodologies to track progress.
- » Regular discussions are held to discuss progress (e.g., at every coaching session, every three months, thirty and sixty day check ins, or annual check ins).
- » A work plan is developed with specific benchmarks. These are reviewed at each coaching session.
- » Clients define goal for success and how they are measured.
- » The client’s manager or executive director is involved in a three-way meeting to define and assess goals.
- » An online 360 process is used as the tool to assess progress.

### Assessment Tools used by Coaches

| Assessment Tools                       | Percentage of Respondents Using Tool |
|--|--------------------------------------|
| <b>360 feedback</b>                    | <b>36%</b>                           |
| Myers Briggs Personality Testing       | 28%                                  |
| Strength finder                        | 25%                                  |
| DISC Situational Leadership Diagnosis  | 11%                                  |
| Thomas-Kilmann Conflict Mode Inventory | 8%                                   |

|                                  |    |
|----------------------------------|----|
| Emotional Intelligence inventory | 5% |
| Do not use assessments           | 8% |

### How Coaching is Integrated into the Organization's Culture

| Integration of Coaching Into Nonprofit Organization |                  |
|---|------------------|
|   | Response Percent |
| Peer coaching                                       | 44%              |
| Organizational coaching                             | 50%              |
| <b>Creating a coaching culture</b>                  | <b>58%</b>       |
| Team coaching                                       | 47%              |

Surveyed coaches create a coaching culture with the organization by:

- » Building coaching capacity in all supervisors in the organization.
- » Facilitating strategic planning discussion and events.
- » Teaching coaching skills to managers and staff.
- » Teaching clients to use coaching methodologies with his/her subordinates, team and nonprofit beneficiaries.
- » Creating experiential learning and behavior modeling through collaborative design workshops.
- » Involving leadership in clarifying the goals for coaching.

### Feedback and Reporting

Seventy-two percent of the coaches surveyed report that the feedback is designed to go directly from client to funder, and the coach does not get involved. Twenty-eight percent of the coaches provide a written report directly to the funder.

Other feedback and reporting methods that are used:

- » Pre and post-evaluations of the coaching experience. These evaluations can include self-reporting, an interview or a 360 assessment by board members or staff.

- » Post-coaching meetings with the client and their supervisor as agreed upon by both the client and the supervisor in advance.
- » Funder’s direct observations.
- » Reports to project evaluator.
- » Coach completes a survey for the funder when multiple clients are coached. This allows confidentiality to be preserved.

Three respondents report that feedback and reporting is either non applicable, or, as one respondent replied, “None of my business.”

### How Coaches are Paid

| <b>Funding for Client’s Coaching</b>        |                         |                       |
|---|-------------------------|-----------------------|
|   | <b>Response Percent</b> | <b>Response Count</b> |
| <b>Clients receive funding for coaching</b> | <b>78%</b>              | <b>28</b>             |
| Clients do not receive funding for coaching | 22%                     | 8                     |

## APPENDIX #1

### CAP Coach Competency Model Survey

Sponsored by the Coaching and Philanthropy Project, this survey was used to develop a suggested competency model or guidelines for coaches working in the nonprofit sector.

#### About the Coaching & Philanthropy Project

The CAP Project was created to assess and advance the application of coaching as a strategy for building effective nonprofit organizations. This project grew out of the recognition that the fields of coaching and philanthropy have much to contribute to one another. In partnership with Grantmakers for Effective Organizations, BTW *informing change*, and Leadership that Works, CompassPoint Nonprofit Services has launched a project to:

- » Help nonprofits become conscious consumers by making the best use of coaching as a means for leadership development and organizational effectiveness;
- » Help foundations understand how coaching fits as a strategy for leadership development and organizational effectiveness; and
- » Develop the coaching profession to most effectively support the needs of nonprofit organizations, leadership development, and organizational effectiveness and engage nonprofits in a powerful way.

We are asking for your contact information so that we can follow up with you for more information. We may also be doing some interviews to delve deeper into these issues. We will only use this information to develop the model and will not share any information you offer with your name attached.

1. Name
2. Organization
3. Address
4. Phone
5. Email address
6. How long have you been coaching?

\_\_\_\_\_ less than 2 years

\_\_\_\_\_ 2-5 years

\_\_\_\_\_ 5-10 years

\_\_\_\_\_ over 10 years

7. How long have you been coaching in the nonprofit sector?

\_\_\_\_\_ less than 2 years

\_\_\_\_\_ 2-5 years

\_\_\_\_\_ 5-10 years

\_\_\_\_\_ over 10 years

8. What coach training have you received? Please be specific and include certifications and any other coach-specific training (e.g., Newfield Network Ontological Coaching Certification, ORSC certification, Certified Professional Co-active coach, etc). \_\_\_\_\_

9. Are you credentialed by the International Coach Federation?

If so, at what level?

\_\_\_\_\_ ACC (Associated Certified Coach)

\_\_\_\_\_ PCC (Professional Certified Coach)

\_\_\_\_\_ MCC (Master Certified Coach)

Are you credentialed by any other coaching organizations? Please list below:

10. Which of the following statements do you feel most accurately describes your approach to or perspective of coaching?

\_\_\_ Coaching is a profession, offered by full-time coaches who have or favor formal training and/or certification.

\_\_\_ Coaching is a profession, offered by part or full-time coaches who have or favor formal training and/or certification.

\_\_\_ Coaching is a practice, offered full or part-time by professionals who rely on their past experience in the nonprofit sector and limited formal coach training.

\_\_\_ Coaching is a perspective, in which consultants consciously take a coaching stance in their work without formal coach training.

\_\_\_ Other (please specify) \_\_\_\_\_

11. Have you worked in the nonprofit sector before becoming a coach?

\_\_\_ No

\_\_\_ Yes

12. If yes, in what capacity

\_\_\_\_\_ Staff member

\_\_\_\_\_ Board

\_\_\_\_\_ Volunteer

\_\_\_\_\_ Management/Leadership

\_\_\_\_\_ Consultant

\_\_\_\_\_ Other, please specify \_\_\_\_\_

13. How do you define coaching to your potential clients? \_\_\_\_\_

14. Have you worked as a consultant with individuals in the nonprofit sector?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

15. Please give the % of your **current** work in the nonprofit sector, in each area listed below.

\_\_\_\_\_ Coaching

\_\_\_\_\_ Consulting

\_\_\_\_\_ Training and development

\_\_\_\_\_ Organizational or team development

\_\_\_\_\_ Blended model of one of the above \_\_\_\_\_

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

16. My nonprofit coaching clients, within the last year, include (choose all that apply):

\_\_\_\_\_ Nonprofit executives

\_\_\_\_\_ Emerging nonprofit leaders

\_\_\_\_\_ Nonprofit staff

\_\_\_\_\_ Nonprofit boards

\_\_\_\_\_ Transitioning nonprofit leaders

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

17. What type of coaching do you mostly engage in with nonprofit clients?

- Life coaching
- Career coaching
- Organizational coaching
- Leadership coaching
- Group coaching
- Other (please specify) \_\_\_\_\_

Comments:

18. Do you engage in any of the following:

- Reflective coaching
- Instrumental coaching
- Observational coaching
- All of the above
- Combination of the above (please specify) \_\_\_\_\_
- Other: (please specify) \_\_\_\_\_

We are assessing the competencies that are needed to effectively work with nonprofits as a coach. We want information on both the competencies related to nonprofit **context** and **culture** as well as the competencies related to **coaching skills**.

19. What does a coach need to understand about nonprofit culture and context in order to be effective? \_\_\_\_\_

20. What coaching skills or orientation are most needed to be effective working with nonprofits?

- Listening
- Inquiry
- Requesting
- Challenging
- Acknowledgement /Affirmation

\_\_\_\_\_ Articulation/Clarification

\_\_\_\_\_ Other (Please specify) \_\_\_\_\_

21. Do you set specific goals at the start of each coaching relationship?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

If yes, how do you follow up to track progress on these goals?

22. Do you have clients who are also working with consultants? If so, how do you collaborate (if at all)?

23. What type of training or experience do you feel is relevant in working with nonprofit clients (e.g., adult learning, change management, etc.)?

24. Do you have clients who receive funding for coaching?

25. What does the funder of coaching (whether it be a funder, board or other nonprofit leader who is paying for the coaching) need to know about progress in coaching and how do you manage that relationship?

26. What kinds of feedback/reporting loops do you rely on?

\_\_\_\_\_ Self-reporting from coachee to funder

\_\_\_\_\_ Written report by coach to funder

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

27. How do you integrate coaching into the organization?

\_\_\_\_\_ Peer coaching

\_\_\_\_\_ Organizational coaching

\_\_\_\_\_ Creating a coaching culture

\_\_\_\_\_ Team coaching

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

28. Do you differentiate between coaching and process consulting?

If so, what do you say?

29. Do you believe that a coach working in the nonprofit sector has to have a background working in a nonprofit organization?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Comments:

30. Do you believe that formal coach training is needed to be an effective coach in the nonprofit sector?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Comments:

31. Do you believe that certification (from a coach training program) is needed to be effective working as a coach with nonprofits?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Comments:

32. Do you believe that a credential from the International Coach Federation (ACC, PCC or MCC) or other coaching organization such as the IAC is needed to be effective working as a coach with nonprofits?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Comments:

33. Do you believe it is important to be identified as a coach?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Comments:

34. How do you describe your coaching orientation when speaking about your work as a coach to nonprofits?

35. What are the three most common issues that your nonprofit clients bring to coaching?

\_\_\_\_\_ Work-life balance

\_\_\_\_\_ Staff issues

\_\_\_\_\_ Board issues

\_\_\_\_\_ Leadership development

\_\_\_\_\_ Fundraising/Fund development

\_\_\_\_\_ Financial goals or challenges

\_\_\_\_\_ Managing change

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

36. What assessment tools do you use, if any?
37. What advice would you have for coaches who want to work effectively in the nonprofit sector?
38. What advice would you have for nonprofits and funders who are choosing coaches?
39. What support do you need to work more effectively with nonprofits?
40. Are you willing to be contacted if we need more information or want to interview you?

The CAP Project is a partnership between Grantmakers for Effective Organizations, BTW *informing change*, Leadership That Works and CompassPoint Nonprofit Services.