

## **AEPOCH COACHING FUND: Learnings and Recommendations for the Field**

During our five years operating as a small foundation, Aepoch Fund experimented with creative ways to go beyond basic grantmaking and increase our support for the small, grassroots groups we funded. One of our most exciting experiments was the Aepoch Coaching Fund. Awarding small coaching grants (ranging from \$1,500-\$3,000), we saw a very tangible increase in the leadership capacity and the organizational effectiveness of our grantee organizations. Additionally, nearly every coaching award recipient stated in their evaluation that their coaching work was deeply transformative and positively impacted their leadership. Here are some excerpts:

- “I now know the value and impact of what I am bringing into the world and sharing with others as a leader. I now feel proud of my healing and work for social justice and change.”
- “I think this coaching experience has pushed me to my edges to learn about my strengths and challenges as a leader and my own fears of success and failure in starting and sustaining this visionary work.”
- “I just led a successful major event and, by putting into operation some group processes that I worked on with my coach, the program was better than it’s ever been, and the relationships and group dynamics went superbly.”

We at Aepoch Fund believe that when given the support they need, nonprofit leaders can be enormous assets as agents of social change. When not constrained by a sense of isolation, lack of leadership skills, and burn-out, leaders grow their vision, their organizations, and their communities in remarkable ways.

Fundamentally, coaching helps nonprofit leaders connect more deeply to their own sense of power so that they can think “outside of the box” and create what was unimaginable to them before. **This freed-up creativity and renewed sense of purpose is exactly what our world needs now, and we are honored to have supported so many leaders in this way.**

What follows is the story of the Aepoch Coaching Fund, and what we learned from our experiment. One part of the story we would like to highlight is that **coaching not only develops strong leaders, but also increases organizational impact.** In order to illustrate this point, we offer a vignette from one of our awardees that describes how coaching expanded her organization’s effectiveness and deepened the community’s investment in their mission. She says, “Coaching has helped us shift our organization from a reactive stance to a proactive stance that allows us to trust our vision and respond to community needs more effectively.” We hope you will find these learnings applicable in your own work, whether you ultimately decide to incorporate coaching into your organization’s offerings or not.

## Overview of the Coaching Fund

Aepoch launched the Coaching Fund in the spring of 2008. The Fund responded to a need that Aepoch saw in the nonprofit social justice community for greater resilience, creativity and leadership in the face of major and continuous shifts in the political, economic and environmental landscape. In this time of what we consider to be a “great transition,” the Coaching Fund sought to:

- Increase the resiliency of leaders and communities so that they could effectively respond to a complex and changing environment.
- Support leaders to imagine what was possible and stretch beyond “business as usual.”
- Envision new organizational forms that might be able to thrive during a time when traditional nonprofit structures were likely to become less viable.
- Provide a safe space for leaders to address feelings of being burned out and overwhelmed amidst the pressure and uncertainty of fundamental transformation.

The Fund was initiated as an experiment to see what kind of benefits coaching might have for our grantee organizations. A resource widely considered valuable in the business world, we were interested to see how access to coaching in the nonprofit world might contribute to stronger leaders, organizations and communities. The establishment of the Fund was part of a broader conversation in the funding community (primarily through the Coaching and Philanthropy Project) and efforts to increase the number of culturally-competent coaches who could provide excellent support to social justice-focused organizations led by people of color.

“Through this process I have learned about ways to step up to my own leadership while sharing power at the same time—without giving one over for the other, but doing both well together.”

— Aepoch Coaching Fund Awardee

## What is Coaching?

Aepoch defines coaching as a professional, confidential and powerful alliance that helps leaders improve their ability to lead their organization by increasing their awareness of themselves, identifying leadership goals and taking action to achieve those goals. Coaching helps leaders attain a vision of themselves and their work in full expression and success, and challenges them to achieve that vision. Unlike a consultant, a coach is specially trained to help leaders clarify what is most important to them in the context of their organization, and identify what will motivate them to take action in ways that feel aligned with their deepest values and aspirations. **Perhaps most importantly, the coaching relationship helps leaders to feel less isolated and offers continuous support to truly shift challenge areas in their work and in their lives.**

“I am surprised to have someone work with me who is so present, so attentive, and is completely there to help me figure out what my work is in this world, and how I can be most effective. I feel seen; I feel heard; I feel more confident. I’m showing up stronger, clearer, with more intention and less fatigue.”

— Aepoch Coaching Fund Awardee

## Team Coaching

In addition to awards for individual leaders, Aepoch offered awards for multiple people within a single organization to receive coaching as a group. Our team coaching awards were one of the most successful and unique areas of the Fund. Working with a team of anywhere from four to eight staff and/or board members, team coaching supported each team member to develop their own individual goals in connection to overall team and organization development.

Team coaching is a strengths-based approach to increasing the collaboration and productivity of teams and relationship systems. Team coaching centralizes an interdependent living system, rather than a collection of individuals. This focus allows team members to recognize the impact of their behaviors and choices on the entire system, and reduces unproductive dynamics.\* **The Fund's team coaching awards invited awardees to embrace their systems' inherent strengths, while also challenging them to devise broad-reaching and shared solutions to team challenges.**

“Team coaching provides us with space to review our organizational practices; assess which of the historical practices are effective; and decide which we should keep and which we need to transform or shift into new ones. These processes are important for the new ground we want to set for the organization given that some of the ‘old business’ is what is getting in the way of our movement forward.”

— Aepoch Coaching Fund Awardee

The response from awardees was very positive, and the Fund found that by pairing one-on-one coaching with systemic team coaching work, organizational change could happen at a rapid pace. In essence, team coaching offered depth plus breadth by linking individual change to organizational change, and that combination seemed to “supercharge” the organizational transformation process.

## Overall Impact for the Award Recipients

The feedback we received from Fund awardees about the impact of the coaching awards was overwhelmingly positive. **Overall, organizational leaders had noticeable improvements in the areas of communication, personal sustainability, relationships and visionary leadership capacity.** Many leaders recognized for the first time how much work they took on alone, and through coaching, they were able to find better ways to support themselves in their organization. Others began to recognize how their leadership style impacted those around them, and what beneficial shifts they could make to build more trust with staff and improve overall work performance. Most were able to achieve a better personal/professional life balance.

By and large, leaders found value in the continuous support and encouragement from their coach, which seemed to break down the sense of isolation and overwhelm that many organizational leaders experience. **Most leaders were able to reconnect to their own inner vision and sense of purpose around their work, which brought a renewed sense of hope and realignment between personal and organizational priorities.** This deep reconnection increased their sustainability and acted as an antidote to burn-out. All of these factors contributed to a heightened ability to respond in creative and flexible ways to change.

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\*Definition provided by Julie Davidson-Gómez, Principle of JDG Strategic Services for Leaders & Teams, LLC, and Coach Liaison for Aepoch's Coaching Fund

What follows are excerpts from several Coaching Fund awardees' written evaluations:

- "My relationships with my staff have changed significantly for the better. I feel that I have a very strong staff for the first time, and the changes I have made through coaching to cultivate those relationships have made all the difference."
- "I now find myself frequently inquiring into how I show up, why I lead in certain ways and how my leadership is impacting others. This expanded awareness around myself and my leadership has allowed me to move toward my coaching goals of being the most authentic leader that I can be and taking an effective "stand" for the vision that I have currently given my life in service to."
- "I've drawn on my coach's positive support in board meetings, community meetings and at fundraisers. She has helped me feel more confident in strategizing and encouraged me to set boundaries for myself in my work."
- "I am constantly reminded of how powerful each of us are, what a great team we are and that we work hard to have greater impact and success in our vision. It's important to remember that even though we each have a lot of skill in facilitating a process, it is very important to have external support and coaching to be more effective and to get to some learning, movement, and clarity about our individual and collective dynamics."
- "We have especially been addressing how I do (or don't) balance time 'on' and time 'off,' loosening my grip on micromanagement, empowering others to increase the organization's capacity, and considering a graceful process of executive succession."
- "Our team coach is such a helpful "observer" who can provide a view that is sometimes very hard to have when we're all in the mix of things. She is able to bring perspective and observations, as well as feedback and the kinds of questions that keep us on track towards our commitment to achieving our goals."
- "Having someone to talk to and share my heart with that can relate to me culturally and on most levels spiritually on a weekly/bi-weekly basis is extremely valuable. It has helped me to learn the importance of creating a network of people I can do this with. It alleviates the feelings of marginalization and isolation that I sometimes have. I also like having someone there to help me develop goals that are in line with my heart/spirit."

## **An Inspiring Story of Coaching-Based Organizational Transformation**

**When I applied for the Coaching Fund award, I was interested in getting out of ‘triage mode’** where our work was always in response-mode and coming from a place of perpetual urgency, so that I could help the organization become more proactive and address what was truly important to our mission. I also needed to deal with issues of staff feeling perpetually overwhelmed and stretched beyond their capacity, as well as how to lead the organization in an unstable funding environment.

One of the first things my coach worked with me on was building relationships with staff and not solely focusing on what I thought they needed to get done. I was unintentionally contributing to the amount of pressure that we were all under as a staff by focusing only on tasks, and adding to the overall sense of crisis by not creating enough space to come together, slow down and support each other. As a result, people’s productivity and commitment to the work was suffering. **By more intentionally building a community where we supported each other, staff relationships grew and our ability to respond to community crises increased.** In other words, we were beginning to carry out our organizational mission much more effectively than before.

I also came to recognize that the economic downturn was not going to change anytime soon and in addition to trying what seemed obvious—like identifying new funders—I worked with my coach to institute a structure for communication with staff that would at least reduce people’s anxiety in the organization. I had been trying to manage the financial stress all on my own, but I started giving staff weekly cashflow updates. Rather than being a burden, it actually relieved people to know what was going on. **I got direct staff feedback that they appreciated the transparency and felt increased trust.** They felt that they were going to be a part of the process and not left out of it. This new communication structure held staff through what was, and continues to be, a really hard financial time.

Finally, my coach and I spent some time being more intentional about my vision for one of our program areas that I felt had this incredible potential to change people’s lives. It just needed something more, but I wasn’t sure what. Coaching helped me clarify what my vision for the program was and identify what had gotten in the way of me reaching my vision in the past. Then, I brainstormed what new components I could add to the program and created a system for making it happen. **I always knew what I wanted, but I didn’t know how to get there.** My coach helped me figure it out. Also, coaching supported me to hold the space for the group in a bigger way than I had done before. I stepped into my leadership in a completely new way. The program was totally transformed because of this process. Every person in the program said they felt their lives had completely changed because we had facilitated such a transformative process. The majority of these participants are now acting in a volunteer capacity to support our organization’s other program work, which means our overall organizational impact has just expanded overnight. Many have also volunteered to be facilitators for the next round, which helps us build our capacity to accomplish our mission with even more community investment.”

—Aepoch Coaching Fund Awardee

## Nuts and Bolts of the Coaching Fund

Over the course of three years, Aepoch Coaching Fund offered a total of thirty-nine individual coaching awards and seven team coaching awards in the range of \$1,500-\$3,000. Each individual award covered a total of twenty sessions (utilized over a six- to ten-month period, depending on frequency) with the option of applying for a ten-session extension. Most individual coaching sessions were conducted by telephone. Team coaching awards were tailored to the needs of each organization, with most sessions conducted in-person. All parties contributed financially toward the effort; coaches agreed to offer a reduced rate (\$125/hour) to awardees, and awardees agreed to pay a portion of the cost (usually \$25 per session). Written evaluations were submitted at the mid-point and again at the completion of the final coaching session.

After soliciting nominations from colleagues in the field, Aepoch interviewed and assembled a diverse roster of ten excellent coaches who were inspiring leaders themselves. These coaches had a depth of experience in the nonprofit world and offered a range of coaching styles and areas of expertise. Each of them shared a deep commitment to personal and social transformation.

The Coaching Fund had one part-time staff person to coordinate the application and evaluation processes as well as the Fund's overall direction, and one paid consultant who served as "coach liaison," conducting intake sessions with awardees to help them clarify their coaching goals and identify who might be the best match for them from the Aepoch coach roster.

## Overall Assessment and Implications for Future Funding

After operating this Fund for more than three years and soliciting feedback on a regular basis from awardees, staff and coaches to determine the Fund's overall effectiveness, we have gained several valuable insights that we would like to offer to our colleagues:

- **Coaching is an extremely potent investment**—We found that offering a small coaching award to interested leaders significantly improved their ability to meet their organizational and community outcomes. Often, coaching support gave leaders the focus they needed to get clear on their priorities and to find the best alignment between their personal vision and the organization's vision, as well as finding better ways to engage others to move this vision forward as a team. By entering into a coaching process, leaders and their organizations were better able to move through "stuck places" and access their own internal wisdom, energy, and resources capable of taking their work to the next level. Coaching support also helped organizations mobilize far more internal resources beyond the grant money.
- **Coaching methodology and theory of change resonates in important ways for community-based nonprofits**—A good deal of coaching methodology rests on the theory that change happens by helping leaders access and align their core values, beliefs and vision with their work. The process is inherently empowering. This approach to change is familiar to social justice nonprofits whose very existence rests on both empowerment and vision-based work. What coaching does that is different than what most leaders do on their own is to turn the focus from the external world to the internal world of the leaders themselves. It is this shift in focus, combined with these familiar values, that we believe provided a particularly powerful catalyst for change for the grassroots nonprofit leaders with whom we worked.

- **Offering coaching awards helps grantees feel valued for who they are as leaders and creates better funding partnerships**—Overall, the nonprofit field does an inadequate job of supporting its leaders, which is evidenced by high rates of turn-over and burn-out. We received feedback from Coaching Fund awardees that they felt Aepoch invested fully in their success and growth by offering an award that focused on them as whole people in their organizations, and not only on their work outputs. The award gave them the space to feel fully supported (perhaps for the first time), and to develop more effective leadership skills. The message recipients received from this award was that we wanted them to be happy and fulfilled in every aspect of their lives and leadership, which is a message that community leaders rarely hear from anyone, particularly funders. This had the unexpected result of deepening the relationship and trust between us and broke down some of the funder/grantee power-dynamics that can get in the way of effective funding partnerships.
- **Ensuring a good match between coach and awardee along with ongoing staff support was a critical success factor**—By designating a part-time staff position to the effort (5-10 hours per week), the Fund built in an infrastructure of support for both awardees and coaches that ensured its success. While a solid coaching fund could be run without much staff support beyond reviewing applications, making funding decisions, and providing a coach referral list, the Aepoch Coaching Fund opted for a more hands-on approach. Designated staff support helped awardees to: partner with a coach that best suited their needs; regularly evaluate and give feedback on their own progress; work out any coaching relationship “glitches”; and tailor-make the award to best suit their needs in terms of frequency and length of sessions. With this level of attention, coaching awardees understood that the Fund would help them every step of the way, as they started an unfamiliar and deeply personal process with their new coach. Once the coaching relationship was established, of course, it remained confidential and only the awardees themselves were asked to share reflections on their own growth and progress through written evaluations.
- **Grantees exhibited a need for both organization development and coaching support**—With increased clarity that was gained from their one-on-one coaching work, many leaders began to identify broader organizational needs that they could not shift on their own. In some instances, grantees requested OD (organization development) assistance from their coach. While there are different opinions in the field, the Fund considers it a best practice to have the coaching relationship distinct from a consulting relationship. This distinction preserves the coach’s role as facilitator of the client’s inner knowledge, rather than as an expert who engages in more technical skills-building or organizational problem solving. However, because our grantees had little access to organizational development funding, we asked Aepoch coaches to provide OD support on an as-needed basis, while educating the grantee about the difference in roles. Ideally, funding for coaching would also include additional funding to address any organization development needs that emerge in the course of coaching.

## Conclusion

Overall, we consider the Aepoch Coaching Fund one of our most successful “experiments.” We discovered that these small investments produced big results. They created more connected and effective teams, more values-aligned organizations, and more sustainable, resilient leaders. Not surprisingly, more resilient leaders are more capable of creative responses to a complex and changing environment. We hope that other funders will continue to build and innovate on the Fund’s efforts and discover how to support nonprofit leaders to do their best work and feel sustained while doing it.

**The world’s best ideas rarely get choked out of a twelve-hour, seven-day per week work schedule, but creative solutions to complex problems can emerge and thrive with enough dedicated space, support, and time for self-reflection.** Coaching is an incredibly dynamic tool that, with increased funder support, we believe could have an enormously beneficial impact on our organizations, our communities, and ultimately our world.

## About Aepoch Fund

Founded in 2006, with a five-year lifespan, Aepoch Fund was a small experimental foundation supporting people, organizations and movements engaged in transformational work to:

- amplify the voices, lives, and art of people who have been marginalized;
- create alternatives to current economic, political and social systems of inequality, violence, and environmental degradation;
- support healing and resiliency in individuals, communities, and movements, including healing from societal trauma; and
- illuminate and bring attention to positive social and environmental transformation that is already happening around the world.

Aepoch completed its grantmaking activities in May 2011. The Coaching Fund was one of Aepoch’s funding strategies that allowed for a great deal of experimentation and innovation. Please visit [www.aepoch.org](http://www.aepoch.org) for more information about Aepoch’s focus, principles and examples of the kinds of organizations the Fund supported.

**Please visit <https://groups.compasspoint.org/coachingnonprofits>**

This website, hosted by Compasspoint Nonprofit Services, includes action guides for grantmakers, nonprofits and coaches as well as an online toolkit that includes FAQs, tools, case studies and reports to help inform nonprofit and grantmaking decision-making about coaching. These resources were created as part of the Coaching and Philanthropy Project and are free to the public.