

center for
nonprofit excellence
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Additional Resources for Nonprofit Executives

Mindfulness

[Download Mindfulness articles](#)

Apps for meditation: <https://insighttimer.com/> or <https://www.headspace.com/>

Recordings for Guided Meditation

<https://www.montereybaymeditation.com/audio/>

Mindfulness means paying attention in a particular way: on purpose, in the present moment, and non-judgmentally. -- Jon Kabat-Zinn

Coaching

[Organizational Development](#) grant funds from the Community Foundation for Monterey County may be used to offset the cost of Executive Coaching. Read more: www.cfmco.org/od

Search for a coach: Nonprofit Consulting Directory: www.cfmco.org/consulting

Coaching and Philanthropy Project (Compass Point) includes Action Guides and Online Toolkit

<https://www.compasspoint.org/tools-and-resources/coaching-and-philanthropy>

What is Coaching and What are the Benefits? (GEO)

<https://www.geofunders.org/resources/what-is-coaching-and-what-are-the-benefits-676>

Coaching Strengthens Nonprofit Leaders and Their Organizations (Curran, 2008)

<http://centerfornonprofitcoaching.com/wp-content/uploads/2011/04/coaching-strengthens-nonprofit-leaders-and-their-organizations-curranscnm-journal08-5.pdf>

Transitions resources

[CompassPoint Workshop for New EDs](#)

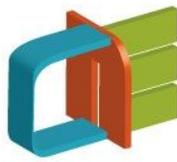
June 12 - 15, 2018, 9am - 5pm all 4 days, Oakland

Article on Sabbaticals

<https://nonprofitquarterly.org/2018/01/19/want-nonprofit-staff-longevity-creativity-consider-sabbatical-policy/>

"The heart of transformative social change is the intimate connection between the outer work of strategizing, organizing, and campaigning, and the inner work of who we are as human beings."

- Robert Gass



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Burnout

[CompassPoint Workshop: Manage Your Time and Energy: A Path To Personal Sustainability](#)

April 27, 2018, 9:30am - 4:00pm, Oakland

Articles

http://www.headington-institute.org/files/preventing-burnout_edited_81785.pdf

<http://www.headington-institute.org/blog-home/667/what-influences-how-i-handle-stress>

Video: Optimizing Self-Care Based on Your Coping Style

<https://www.youtube.com/watch?v=cidrkVEjMzQ&feature=youtu.be>

Self-Assessments

http://www.headington-institute.org/files/analyze-your-job-stress-tool_82281.pdf

http://www.headington-institute.org/files/testareyouburnedout2_edited_10092.pdf

Resilience: our innate capacity to renew and to mend after intense, stressful or threatening experiences. -- Staci K. Haines

Somatics

https://www.youtube.com/watch?v=Y2MD5v4_Pxw

Our quality of presence is something we can cultivate, moment by moment. It permits us to greet what arises in our lives with our most enlightened selves, thereby allowing us to have the best chance of truly repairing the world. --Laura van Dernoot Lipsky

Mutual Support

Executive Director Learning Community

2018 dates TBD

www.cfmco.org/resources

“Nonprofit Executives Monterey County” Email List

nonprofit-executives-monterey-county@googlegroups.com

This email list is for nonprofit executives to connect quickly with one another. The idea originated from the Executive Director Learning Community at the Community Foundation. It is open to any and all current Executive Directors/ CEOs in Monterey County. To join, email cne@cfmco.org.

Our capacity to address our toughest social challenges depends on our willingness to admit we are part of, rather than apart from, the woundedness of our world. -- Adam Kahane

REFLECTIVE PRACTICE TOOL

2-15-18

Nonprofit Executive Retreat

Honing My Reflective Practice

CLARITY

Why did I choose to invest in today's Retreat?
What intentions I have a set for my experience?
How would I like to participate? Interact with my peers?



COMPETENCE

What knowledge, understanding, skills, &/or resources do I hope to gain from today?
Which do I feel competent applying already – personally, professionally?



CONFIDENCE

Any concepts, resources, experience where I felt uneasiness or discomfort with adopting – personally, professionally? Why? When did I feel capable, bold? Any patterns? What support do I need/want to become more confident taking action on insights, resources I gained?



CONNECTEDNESS

What ideas, resources shared today are new to me?
Which hold most promise for supporting me – personally? Professionally? Who would I like to do more peer sharing with? How could I benefit from coaching?



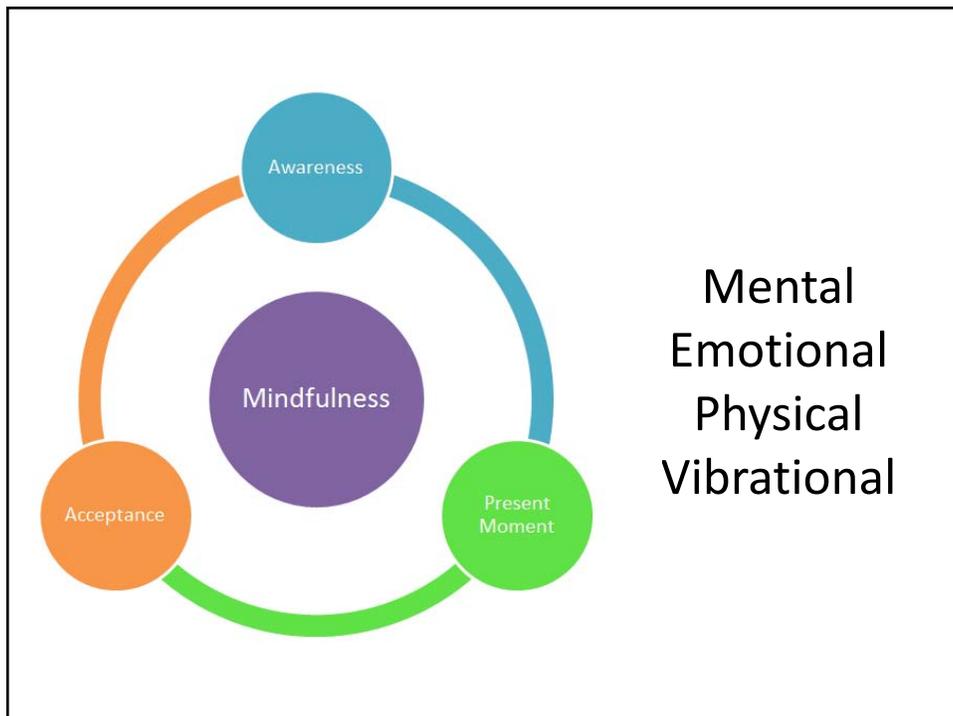
COMMITMENT to ACTION:

What is one thing I commit to doing to apply insights, resources I gained today?
Why is this important to me?
By when will I begin?
How will I be accountable?





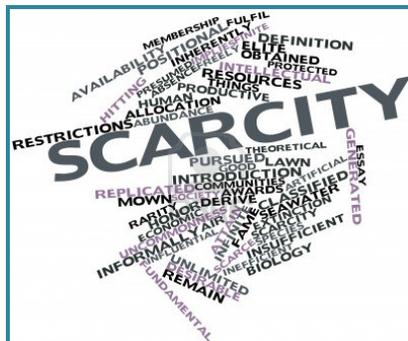
*Mindfulness:
A Social Justice
Perspective & Practice*
Renato P. Almanzor, PhD
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What Matters

For whom and what do you have LOVE and GRATITUDE?	For whom and what do you have COMPASSION and COMMITMENT?
<p>What does this say about What Matters to you?</p>	

What's Difficult: Our Culture of Scarcity



- ✓ Prone to shame
- ✓ Prone to comparison
- ✓ Fractured by disengagement

Adapted from Brené Brown, *Gifts of Imperfection*

What's Difficult: Structures of Oppression



Oppression is...a System of Advantage, Entitlements, and Benefits Based on

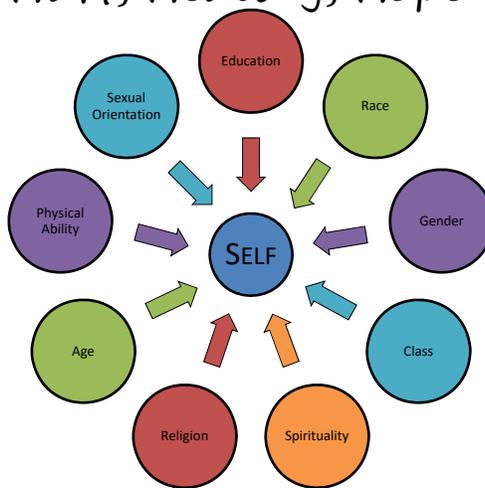
Group Membership

That allows for the Systematic Mistreatment of Others

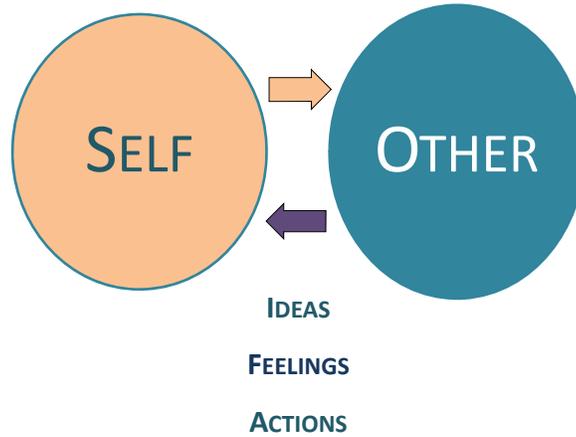
"PREJUDICE+ POWER"

-DAVID WELLMAN

What's Difficult: Hurt, Healing, Hope



What's Difficult: Cultural & Structural Influences on Our Interactions



What is your *CALLING*?

What pulls you into
ACTION?

THE THINGS YOU ARE
PASSIONATE ABOUT
ARE NOT RANDOM,
THEY ARE YOUR *CALLING*.

-- FABIENNE FREDRICKSON

COACHING TOPIC WORKSHEET

1. I currently have these **CONCERNS/CHALLENGES**:

2. I see these **OPPORTUNITIES** ahead for me:

3. These **QUESTIONS** are intriguing to me:

Please turn over →

4. Please put  next to the topics above where coaching support might be desirable.

5. I would be willing to participate in a coaching demonstration today:

Yes please

No thank you

Your name: _____

Hiring a Coach: Is it Right for You?

By Nicki Roth, Co-founder, Saroga: The Nonprofit Leadership Forum

Hiring an executive coach can help you grow as a leader in ways that few other resources can provide.

In a 2011 Compasspoint report titled *Daring to Lead*, over 3,000 nonprofit executives were surveyed about the challenges they face. Among their top three recommendations for supporting their development as leaders was expanding the use of executive coaches. Respondents in the study overwhelmingly cited coaching as one of the most effective developmental resources especially when coupled with peer networks. That said, a small percentage of leaders actually had a coach. This begs several questions. What is coaching? When do you need it? How can you make the most of it? And why aren't more executive directors engaging a coach?

What Is Coaching?

Since coaching as a profession is unregulated and no one has to pass exams or get licensed, let me start with a good working definition. A coach is someone who facilitates your professional growth so that you become a more effective leader. An experienced coach has deep knowledge of human behavior, leadership, and your particular sector or field, in this case, familiarity with nonprofit organizations. In some cases the coach has been an executive and brings that insight to bear. A coach is not a friend or a mentor or a therapist. Coaching is a formal arrangement with only professional objectives in mind.

The process of coaching is a series of regular meetings where you have the opportunity to privately raise challenging dilemmas, gain insight through meaningful discussions, and rehearse and refine new behaviors. Two or three goals are determined at the beginning and it is expected that, within several months, you will receive positive feedback for improved leadership actions. As much as possible, the coach draws out your best thinking and supports your efforts to try new things. When you get stuck or limited in your thinking, the coach will offer additional perspectives and solutions.

When Do You Need a Coach?

The simple answer is whenever you desire to grow as a leader. You or your board will know when you have stalled in your trajectory, when you have been doing well but see untapped potential to unleash, or when organizational demands require new skills. You also may feel like you missed some formal leadership training, and coaching seems to be a good way to make up for lost training opportunities. As I mentioned in my last article on [360s](#), coaching also is a good way to digest feedback and to enact a professional growth plan. It is especially effective during your first year as a newly appointed executive director. At its most powerful, coaching is done when you're doing a good job but would be even more effective with some additional growth as a leader.

How Can Coaching Make A Difference?

When working with a coach, you need to bring your issues, doubts, questions, and receptivity to feedback to get the most from the experience. If you call upon a coach after a poor performance review or tough 360 feedback process, the outcomes are more uneven. If you're struggling but are eager to learn how to do a better job, a coach can be ideal. The coach is a safe person to offer an intensive tutorial in leadership and executive presence. But if you are not a good organizational fit or mistrusted or unreceptive to feedback or introspection, then coaching will not fix that.

Consider this example. When Victor was hired to become the next executive director of a spiritually based nonprofit, the board chair and recruiter baked into the transition plan the cost of a coach. They felt strongly that any new person walking into this organization would face some unique challenges and they wanted to ensure Victor's success.

After the preliminary introductions and credential sharing, Victor and I, as his coach, got right to the heart of his concerns. He had been on the executive team for three years already and knew that some dramatic changes needed to be made to create a financially and culturally healthier environment. These modifications would significantly improve the attendees' experience and Victor had the board's support to do what was necessary in his new position.

Victor had years of successful management and leadership experiences, so our work focused on which of those skills would be most useful in this new position and what new approaches would be needed. Our conversations centered on leading a culture change with a very entrenched staff. Our conversations over the course of a year were rich, multidimensional, and practical. Victor tried many tactics, vented his irritation, asked tough and poignant questions, tried more new actions, and reflected on what worked and what didn't. Slowly but surely the culture began to

change, the board was thrilled, and Victor began to feel positive momentum for the organization and more satisfied in his role.

Over the months that we worked together we paused to assess our progress and the usefulness of the coaching. Victor remarked, “I can’t talk about these things anywhere else. As great as my board chair and my team members are, I can’t say these things out loud to them. I need the privacy of this relationship to say all the frustrating things. I need to bring positive energy, solutions, and confidence to them. These conversations help me clear my head, test my thinking, simmer down, and have a plan for leading the organization in new directions.”

Why Aren’t Executive Coaches Used More Frequently?

Coaches can be very beneficial to a nonprofit leader’s professional growth, but historically nonprofits and funders alike have been reluctant to spend time and money on leadership development. Funding is routinely earmarked for programs, so there is little thought or resources devoted to talent development. In conversation and in theory, foundations, boards, and leaders all declare the importance of effective leadership, but when tough financial choices are being made, this issue drops off the list.

Here is a place where nonprofits could take a valuable lesson from the for-profit world. Although the methodologies and programs have changed over the years, leadership development is a line item on the annual budget. It gets bigger or smaller depending on financial performance, but it rarely gets deleted. Corporations understand that great leadership is a differentiator that can make the difference between decent or amazing results. And coaching is an especially effective development tool for senior leaders because it is private, intensive, customized, and leads to observable behavior changes. Nonprofits need to think this way, too.

Conclusion

Numerous studies have shown that an investment in [high-impact leadership development](#) has a multiplying effect on achieving or exceeding organizational goals.

Coaching, in particular, is a unique opportunity to meet regularly with someone whose only purpose is to help you be wildly successful. The coach brings insights, new ideas, recommendations, and stories about other leaders who have traveled the same path. What you need to bring to the conversation is your willingness to learn and experiment with new behaviors. Describe tough issues that cause you to stumble and strengths that work well. You need to go beyond venting about a frustrating situation and be open to new perspectives and new actions in an effort to best develop yourself and to add value to your organization.

In other words, you need to challenge yourself to share your vulnerabilities and try some new behaviors that will feel awkward at first. If you are earnest in your efforts you will experience moments of greater effectiveness that will motivate you to keep learning. Once you see how a few changes can make a big difference you will be hooked. That's when the fun and accelerated learning kicks in.

Guidelines For Selecting A Coach

1. **Get recommendations from colleagues who have had success with a coach.** Get several referrals and set up interviews with each one. It's like finding a doctor; you can find one on Google but it's better to hear about someone's experiences with a practitioner.
2. **During the interview, ask probing questions.** What is your measure of success? What can I expect during our conversations? Tell me how you helped someone else. What if this doesn't work? Are you going to talk with my board chair? How would you address my specific issue?
3. **Connecting with a coach is critical but not especially scientific.** Does this person listen? Do you believe she or he can help with your particular situation? Can you see yourself trusting this person? Will you be comfortable exposing your vulnerabilities? Ultimately the decision is more intuitive. Do you click with this person? Is the chemistry right for you?
4. **Explore knowledge and logistics.** Most coaches spend their time in for-profit organizations. Be sure that your coach is well versed in the nuances of the nonprofit world. Inquire about scheduling flexibility because things can change on a dime in your routine. Ask about phone, email, and Skype access. Discuss fees and negotiate, if necessary. Get clarification on frequency of meetings and contract terms. Common practice for many coaches is to meet once or twice a month for 1.5-2 hours over the course of 6-9 months. Most coaches will have standard practices in all these areas but are open to fit your needs.



Nicki Roth is the co-founder of Saroga, the Nonprofit Leadership Forum (www.saroga.org). Her work focuses on facilitating leadership growth. She recently wrote *Beyond Passion: from nonprofit expert to organizational leader*, which offers a framework and guidance to develop more effective and impact filled leadership insights and skills.

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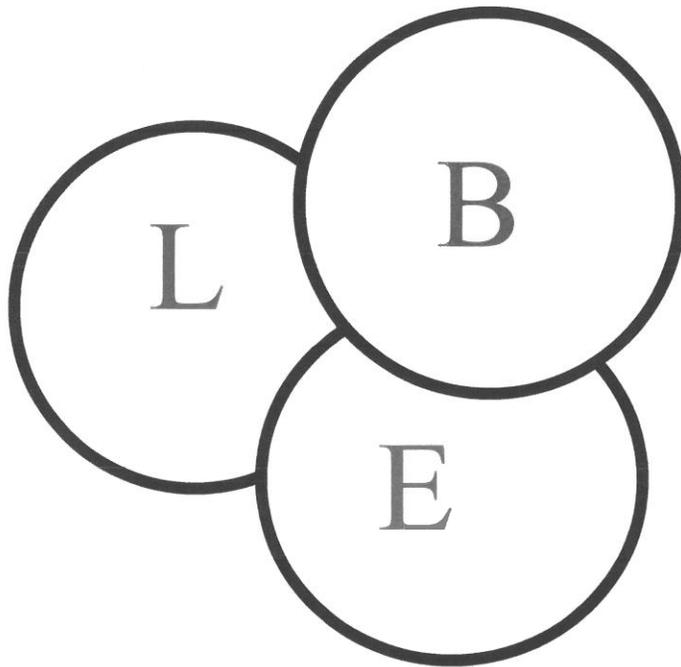
Quick recovery tips when you have lost your 'center'

- Chi Gong movement to clear chakras-moving up your midline as you inhale, stretch arms overhead, palms rotate to face the ceiling. On the exhale, float the arms out and down to your side (like wings flapping).
- Close eyes and imagine a restful location and take 3 deep breaths for a quick mental vacation, sensing the temperature and scents. (even more powerful if you can shift your posture to a different stance ie. From seated to lying down or standing up).
- Take a break and walk for 1-2 minutes focusing on breath and clearing the mind. (like pressing the reset button). Change the pace of your walk (slow down) so your breath can deepen. Or speed up so your breath quickens.

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Shifting our Observer

Our coherency (beingness) can change or open new possibilities through any circle.



Language = action. It is what creates relationships. It is generative. We become what we say and think.

Emotions and moods (put the body in motion) - they move us to action or inaction. We move through many emotions with any given situation or time of day. What is your default mood?

Body. It connects to the emotional state. Different body position can cause you to listen differently (anger management, breathing, etc). Very powerful indicator. Shift your body position and notice what becomes available. (ie if sitting, stand up or lay down)

We create a coherency of who we are being when all 3 are in alignment. Change one circle and the other two must move into alignment. (i.e. can't be smiling and say we are sad while our body stance is proud.)



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CENTER *BALANCE OF 4 ELEMENTS*

Effective Action
Emotional Balance

Mental Awareness
Spiritual Vision

WHEN YOU ARE CENTERED YOU ARE

- Connected to your Body (your Self)
- Present to others and your mood
- Open to possibilities and the interpretations of others
- Focused on what you care about (the for sake of what)

PHYSICAL ELEMENTS OF CENTER

- Vertical Line - head, shoulders, hips (length) aligned
- Feel pull of gravity from pelvis down through earth
- Invisible thread pulling from pelvis up into heaven
- Relaxed jaw, chin, shoulders, hands and eyes
- Balance - left to right, front to back (width & depth)
- Breath is dropped into center core

RELATIONAL CENTER = IN RELATION TO OTHERS

- Act from Feeling Self
- Observe the world from different perspectives
- Open and connected to others and environment
- Focused on what is important to you and others
- Able to listen and be open to others' point of view
- Can tolerate uncertainty and/or conflict
- Use grounded assessments to base psychological thinking
- Able to manage and shift mood of self and others
- Able to build trust with others
- Able to inspire and motivate others

Source: Strozzi Institute