

WHEN TO USE COACHING

WHEN AN INDIVIDUAL WANTS TO ...	COACHING CAN ...
Excel in a new role and strengthen competency	Help the individual set priorities and/or develop key leadership skills
Function more efficiently, deal with being overwhelmed or achieve better work-life balance	Help the leader prioritize and make choices about what is important and how to manage time and set boundaries
Become a stronger supervisor and/or use coaching skills to manage others	Aid the individual in increasing self-awareness and developing management skills while providing the experience of having a personal coach as well as guidance in effectively coaching others
Address feelings of "loneliness at the top" or isolation in a leadership role	Provide a confidential partner who allows the individual to share concerns that he or she may not feel comfortable sharing with staff, board members or grantmakers
Transfer to a new role or function	Assist the individual in planning a successful move and in preparing for additional leadership responsibilities
Develop a career path	Help the individual to define career goals, inventory talents and skills, and explore and evaluate job options, either within the current organization or elsewhere <i>Note: This type of coaching is often considered career coaching.</i>
Leave the organization	Help the individual determine what's next, support the process of letting go and create a good ending with the organization

WHEN AN ORGANIZATION NEEDS TO ...	COACHING CAN ...
Ensure a successful organizational transition (e.g., the departure of an executive or a reorganization)	Assist individuals and teams in defining changes in roles and responsibilities, and in identifying system and process changes
Accelerate organization-wide change (e.g., growing or consolidating programs, creating a culture of collaborative decision making or integrating advocacy work in the organizational mission)	Bring greater focus and accountability to leaders as they develop new strategies for managing people and programs, building buy-in and accelerating change
Tap employee potential	Help develop and support good performers whose potential is not fully realized
Take advantage of learning opportunities such as external training, peer networks and sabbaticals	Provide opportunities for leaders and key staff members to think about and plan how to put new learning into practice within the organization

WHEN COACHING IS NOT THE BEST SOLUTION

Coaching is not a cure-all. In fact, coaching can be precisely the wrong approach to the challenges facing an organization and its leaders.

WHEN AN INDIVIDUAL IS ...

A BETTER RESPONSE WOULD BE ...

<p>New to a task or role <i>and</i> his or her competency level is low</p>	<p>Training, guidance or mentoring from someone with experience in the task or role (perhaps with coaching as a follow-up to help the training take root)</p>
<p>Not a good fit for the job or the organization and the organization decides that it is time for the individual to move on</p>	<p>Reassignment or termination with proper human resources support</p> <p><i>Note: Coaching is not meant to be punitive or a last-ditch effort before firing. Coaching also is not meant to be used to evaluate a staff member.</i></p>
<p>Dealing with significant personal or psychological problems that interfere with job performance</p>	<p>Referral to therapy</p>

WHEN AN ORGANIZATION ...

A BETTER RESPONSE WOULD BE ...

<p>Has systemic issues that are causing poor performance (for example, the organization lacks a clear business model or strategic plan, the organization is too dependent on one funding source, financial controls are lacking, or the board and management are shirking key responsibilities)</p>	<p>Targeted consulting in key functional areas with coaching as a support for larger interventions</p> <p><i>Note: Do not engage a coach to fix a systemic issue beyond the control of the coached individual. Rather, coaching can support an individual to determine what is within her or his control and how to proceed accordingly.</i></p>
<p>Is facing an internal crisis</p>	<p>Targeted consulting or mediation with coaching support to help navigate the situation(s) and extract useful lessons for the future</p>
<p>Has leadership that has not engaged in a serious and honest conversation about challenges and the need for change</p>	<p>Facilitation, mediation or training in giving and receiving feedback or managing conflict</p>