



Using a Coaching Approach to Improve Results

February 9, 2022

National Association for State
Community Services Programs

Thank you for joining us!

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TODAY'S AGENDA

- Introductions
- Review the CSBG Network Coaching Model
- Fluidity of Approach
- Coaching Opportunities
- Coaching and Financial Management
- Questions, Discussion
- Wrap-up



Coaching Training Series

Series 1: Using a Coaching Approach to Improve Results
(December 1, 2–3 pm)

Series 2: Coaching for Performance Management
(Today)

Series 3: Coaching and Financial Management
(February 9, 2–3:15 pm)

Peer Coaching Pilot Session at NASCSP Winter Conference
(February 28, 4:00pm)

<https://nascsp.org/using-a-coaching-approach-a-guide-for-state-csbg-administrators-to-improve-results-webinar-series/>

WHAT IS COACHING?

“Coaching is chiefly about discovery, awareness, and choice. It is a way of effectively empowering people to find their own answer, encouraging and supporting them on the path as they continue to make important choices.”

—Henry Kimsey-House

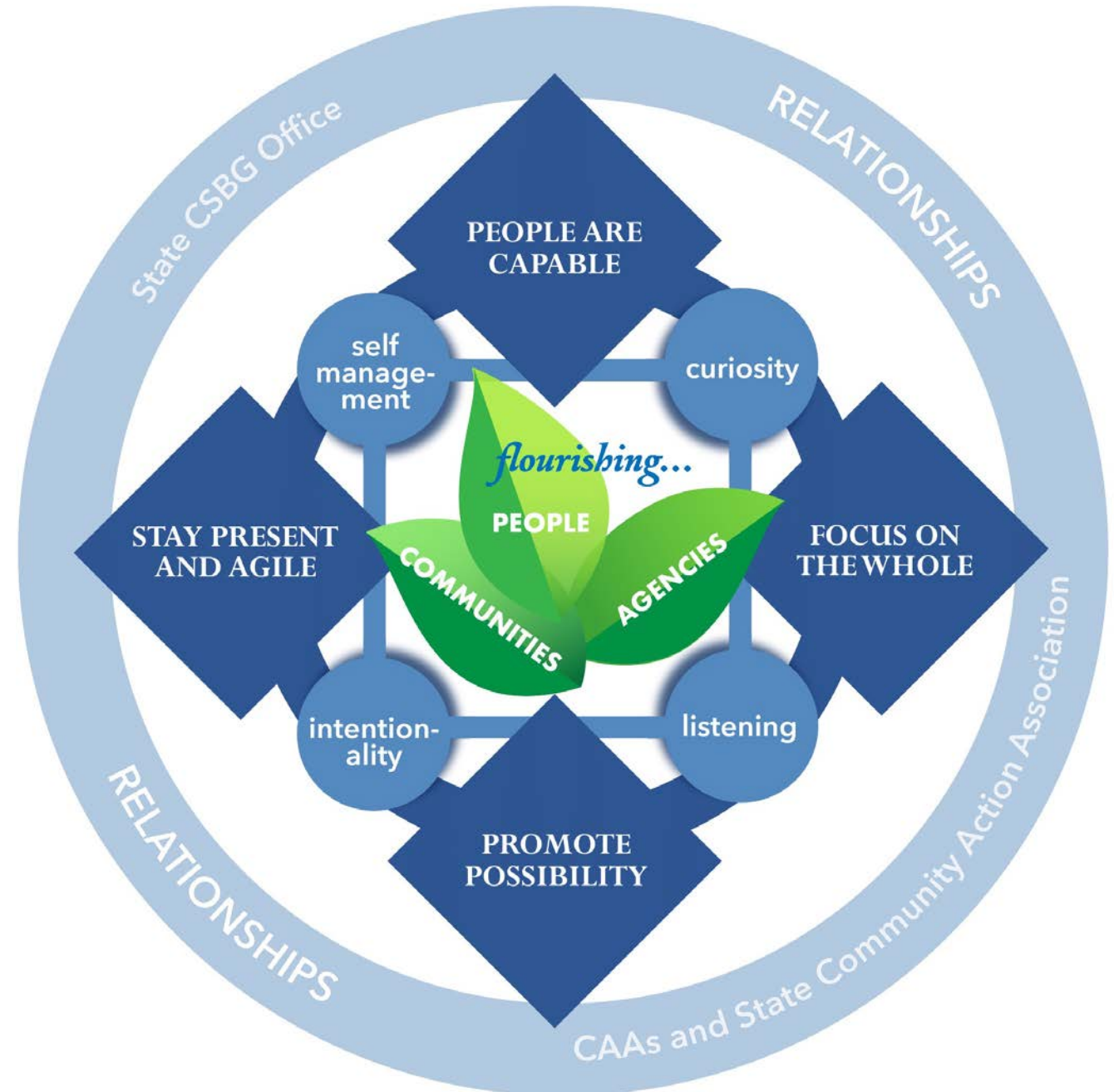
In other words—coaching is about unlocking people’s potential to maximize their own performance.

WHAT IS COACHING?

Performance = potential – interference
P = p – i

—*Coaching for Performance*, Sir John Whitmore

LET'S REVIEW: The CSBG Network Coaching Model



THE CSBG NETWORK COACHING MODEL



Relationships between the CSBG State Office and CAAs and the State Association frames and supports the space for coaching to exist and for learning to take place.

4 core beliefs

Together, these build the scaffolding needed to achieve change and allow flourishing, leading to greater impact.

4 coaching skills

REMEMBER:

“Coaching is chiefly about discovery, awareness, and choice. It is a way of effectively empowering people to find their own answer, encouraging and supporting them on the path as they continue to make important choices”

—Henry Kimsey-House, et al., xvi

WHEN DO YOU COACH?

- **Compliance/Regulatory**
- **Training and Technical assistance**
- **Contract Management**
- **Communication and Linkage**
- **Coaching**

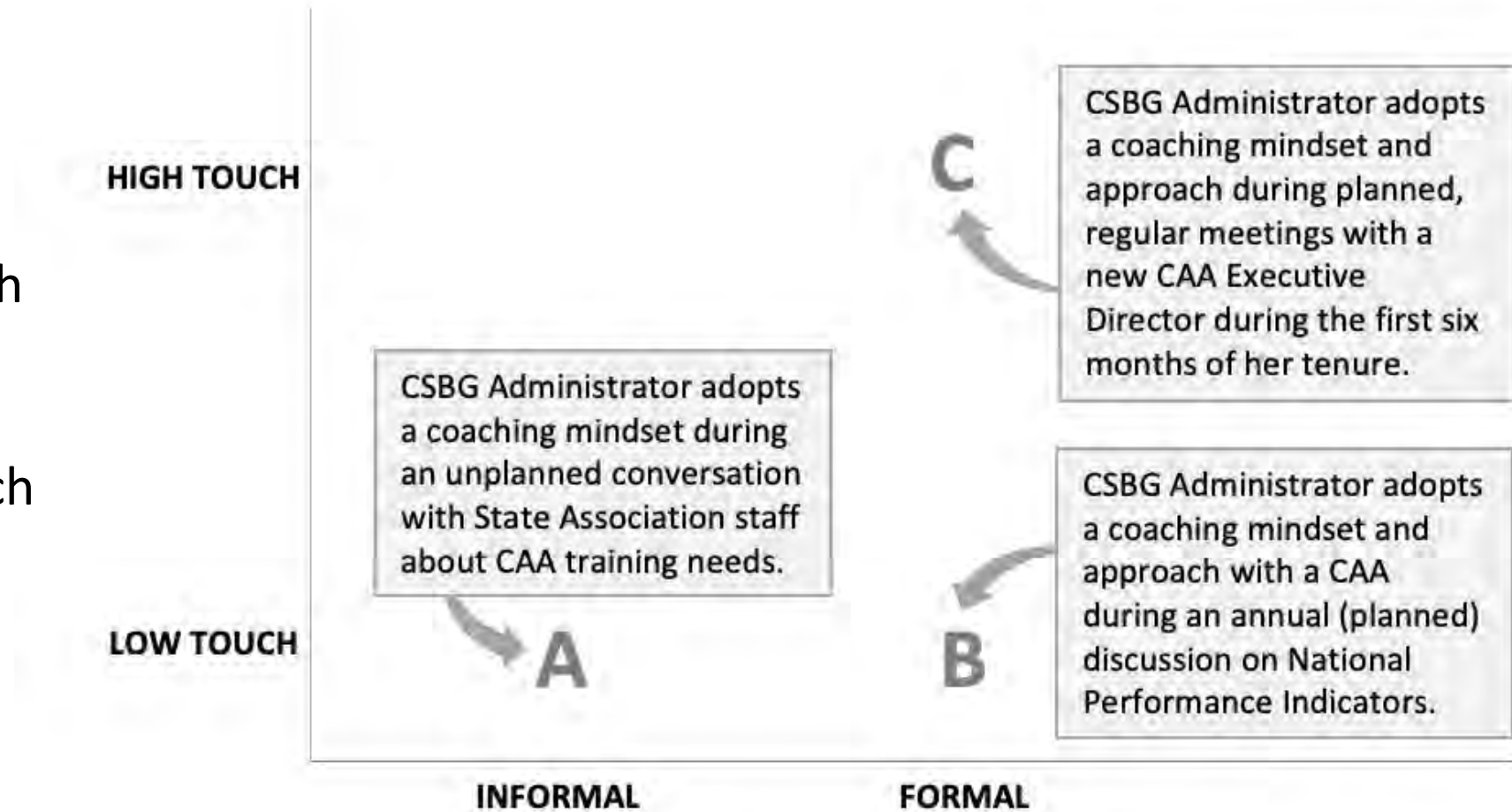
Fluidity of Approach

WHEN DO YOU COACH?

A. Informal, Low-Touch Coaching

B. Formal, Low-Touch Coaching

C. Formal, High-Touch Coaching



Using a Coaching Approach to Improve Results

Coaching in a Financial Management Context

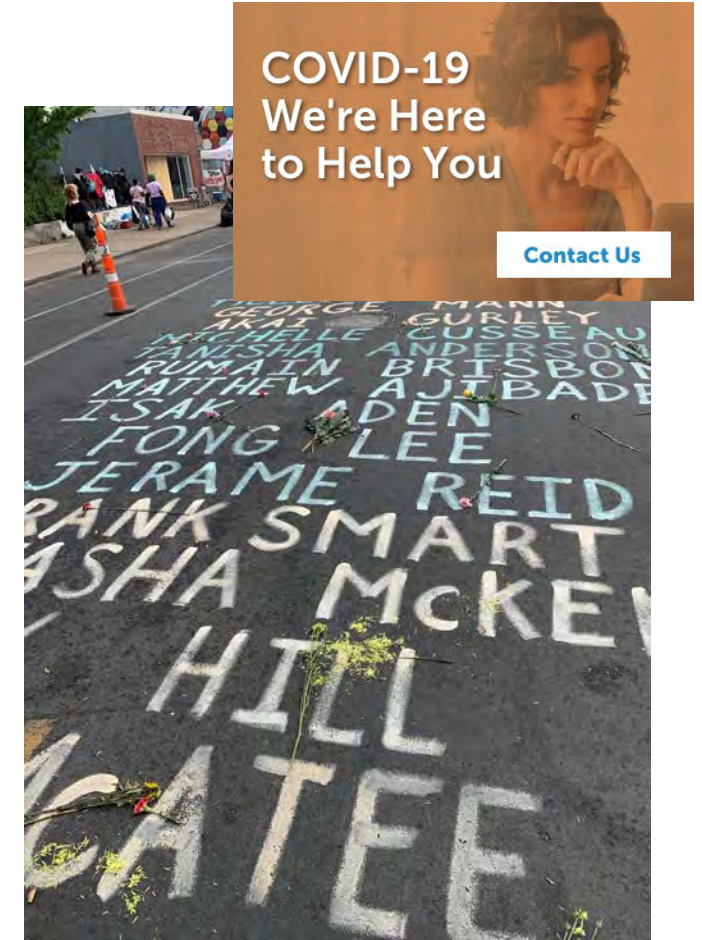
We recognize State CSBG Offices have different structures and approaches for financial management

What Is It That We Are Coaching Through?

- We're now years into pandemic, social disruption, and economic crisis.
- Organizational instability caused by the pandemic is not simply an interruption.

Financial leadership during this time...

- Demands an **unflinching look** at CAA's programmatic and fiscal state.
- Requires a willingness to **seek and share solutions**.
- Holds true to your mission as you make decisions in the midst of **hardship and opportunity**.



We Are All in this Together

Always important, now essential ...

- Nimble resource management
- Collaborative financial leadership
- Honesty and transparency



Willingness to have **courageous conversations** about race, equity, organizational values, human resources, and **finance**.



Organizations are Complex...So are Human Beings

Financial
Effectiveness

Mission and
Values

Program
Innovation

Business Model
Redesign

Organizational
Culture

Diversity,
Equity, and
Inclusion



Exercise Part #1

Think about a time when you last had to have a hard conversation about finances with an agency, or a conversation that's coming up.

What mindset did you or do you have going into the conversation? What point of view do you think the State Association or CAA brought or will bring to the discussion?

Write down your reflections on a piece of paper.

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The Reach and Purpose of Financial Leadership



Leadership (Amplifying)

- Evaluation
- Strategy
- Collaboration

Management (Tending)

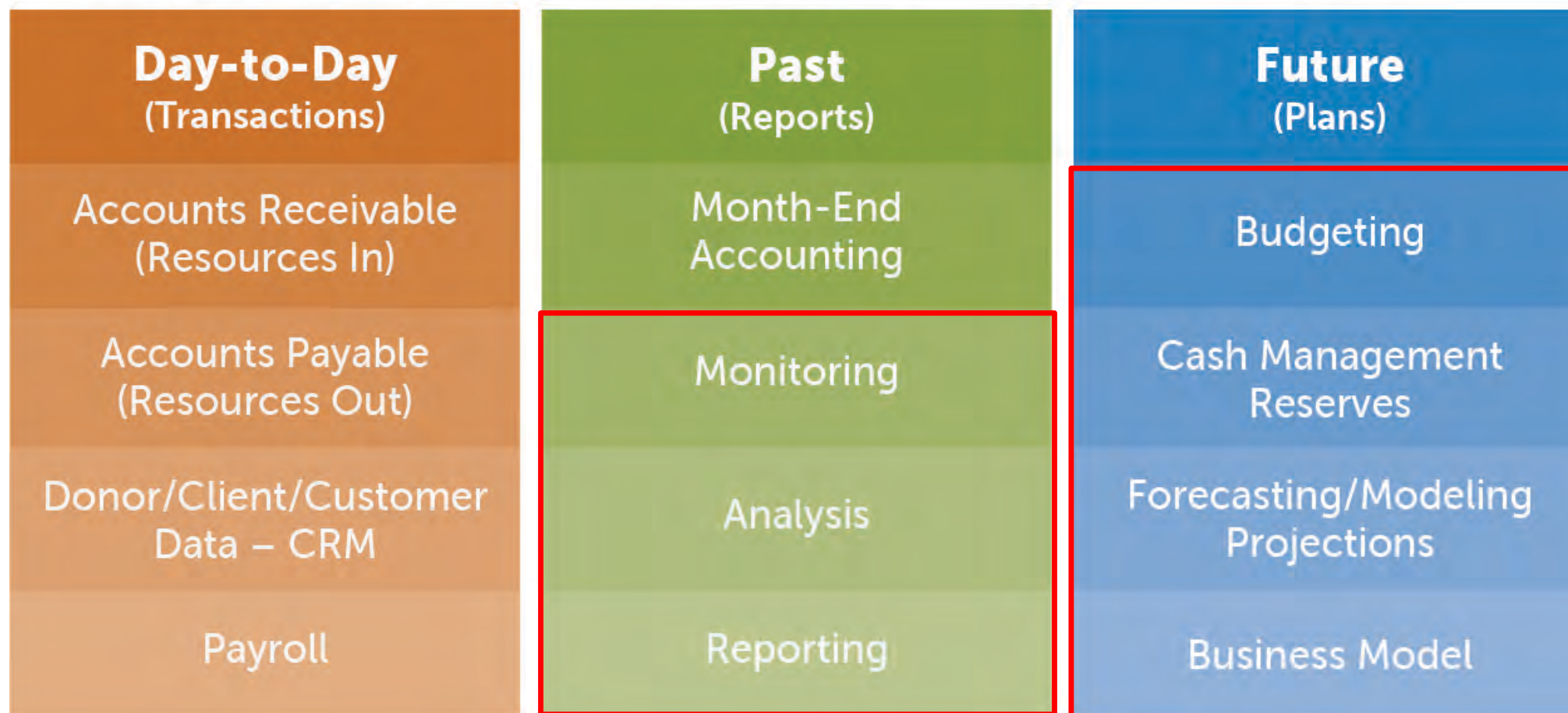
- Reporting
- Coordination
- Efficiency

Accountability (Guiding)

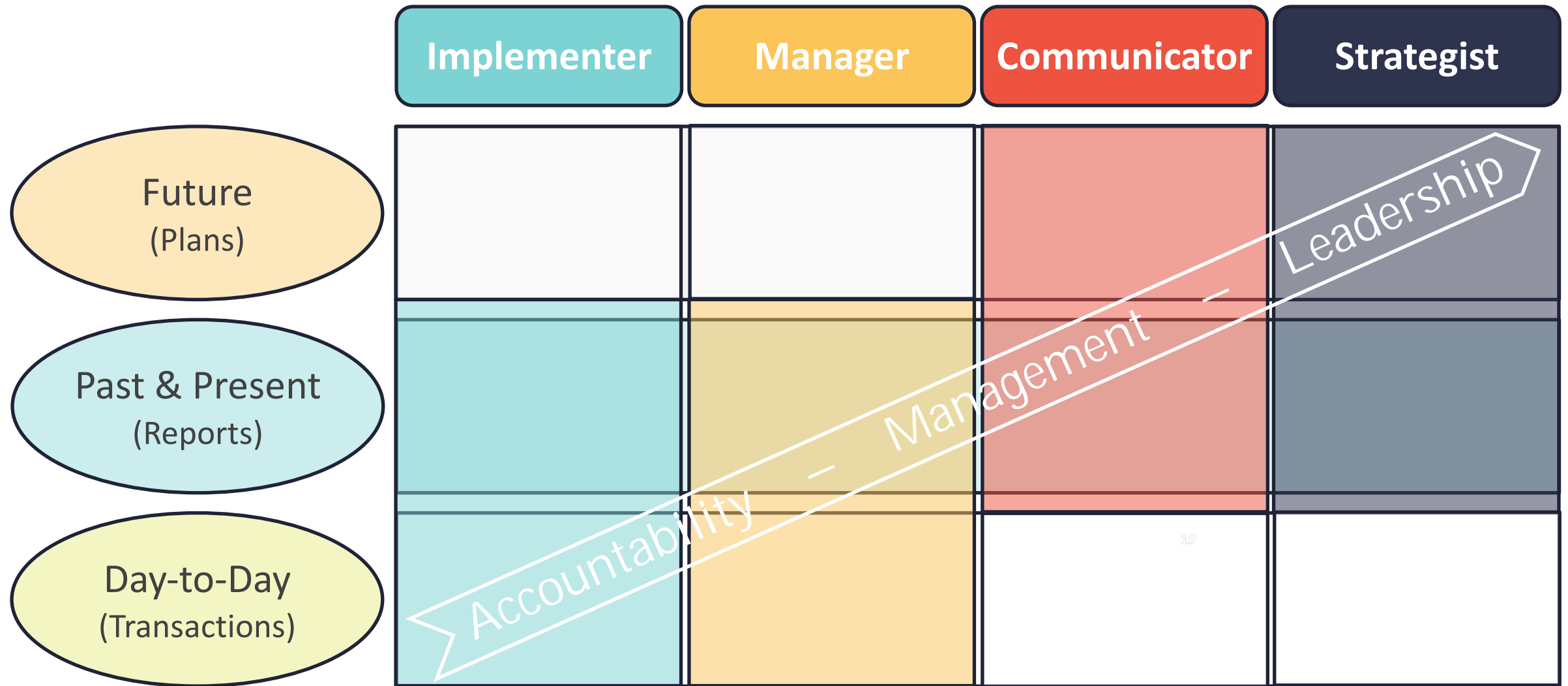
- Compliance
- Internal Controls
- Transparency



Whole Organization Finance – Responsibilities



Whole Organization Finance – The Matrix





Exercise Part #2

As you think about the situation you wrote down in exercise part #1, what role or roles do the people you will interact with play relative to finance?

What responsibilities are theirs? What do you know about their comfort level with finance?

How does that shape how you come to the conversation?

Write down your reflections on a piece of paper.

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CSBG Network Coaching Model Beliefs in Practice



People Are Capable: Each person can and should play a valuable part in strengthening grantees' financial health.



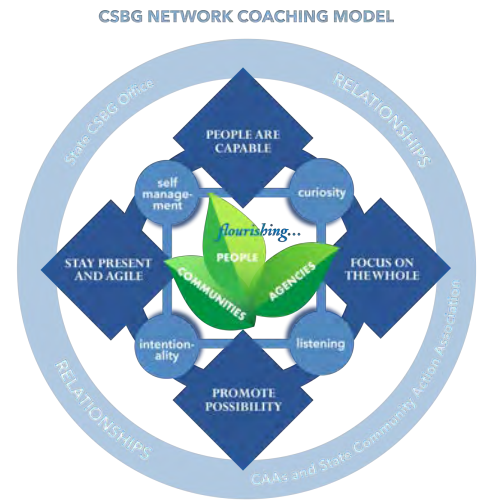
Focus on the Whole: CAA's hold a complex cycle of fiscal management that operates most effectively when it involves the whole organization.



Promote Possibility: You are using your coaching influence to its highest purpose when you focus on the future.



Stay Present and Agile: Today's environment requires a willingness to seek solutions, and willingness to adapt, create, and innovate.



Financial Coaching in Action

Coaching Opportunity	Approach	Structure and Intensity
E. D. contacts State Administrator and shares plans to use agency reserves.	Approach the unplanned discussion with a coaching mindset, listen, ask questions that help the E.D. consider how this decision may align with the agency vision of the future and organizational stability.	Informal, Low-Touch
Reviewing a CAA Community Action Plan (CAP) you notice a rapid increase in budget size and new revenue streams.	Express interest and excitement about where the growth is occurring. Inquire about how the new programs and revenue streams will help strengthen their sustainability, and what new capacities they think they'll need to achieve their goals.	Formal, Low-Touch
Financial Data Walk (may or may not be in conjunction with other review or assessment such as audit, CAP review, monitoring, etc.).	Review and assemble existing financial information (may need to take a team approach at state depending on structure), schedule formal meeting with CAA team. Let the CAA drive the conversation, but be well-positioned to listen, be curious, and ask questions that help the CAA identify interference that might be blocking CAA performance and future goals.	Formal, High-Touch



Financial Management Data Walk

- Some situations may call for a more structured or intense coaching conversation.
- May be appropriate in conjunction with other review or assessment such as audit, CAP review, monitoring, etc.).
- Four-step process
 1. Gather information
 2. Summarize information
 3. Prepare a set of questions reflecting what you and/or the team know about the CAA
 4. Prepare a second set of questions that help the agency gain clarity about their challenges, opportunities, and future goals
- You may want to use a mix of a coaching approach, training approach, and/or a compliance or regulatory approach.



1. Gather Information

- The power of applying coaching to financial matters truly pays off when you do so based on good financial information.
- Data collection processes will vary depending on your situation, capacity, and grantee portfolio.
- The items to the right offer a starting point for the kinds of information you may want to consider collecting to support your coaching conversation.
- As you think about reach and purpose of financial leadership, consider what components of past and present (reports) and future (plans) might help illuminate solutions.

- ☐ Internal financial statements
(see *Financial Management Coaching Tool* for additional details)
- ☐ Audited financial statements
- ☐ IRS Form 990
- ☐ Budget or forecast
- ☐ Finance committee minutes
- ☐ Other: _____



2. Summarize Information

- Consider summarizing the information into a concise, easy-to-read format.
- Laying out the information in a digestible format has several benefits:
 - Demonstrates transparency
 - Helps to spark conversations and identify opportunities
 - Provides a more holistic understanding of agency finance
- The *Financial Management Coaching Tool* contains a basic framework and set of data points you might consider organizing into summary form to share during conversation with your grantees.

Agency Name:			
Organization & Grant			
Fiscal Year	CSBG Funding (CY)	Total Budget (CY)	CSBG % of Budget
Summary & Analysis			
Recent or Upcoming Key Management Changes	Recent or Upcoming Key Operational Changes	990 Governance Compliance	Quality of Financial Reporting
YE Cash (Months) <small>Amount of Cash divided by average monthly expenses</small>	Current Ratio <small>Amount owed by others divided by amount owed to others</small>	Cumulative 3-year Margin <small>Total surplus or deficit (revenues less expense) in last 3 years</small>	Growth Analysis (CY vs PY) <small>Percent increase or decrease of budget vs prior year actuals</small>
Areas of Strength:			
Areas of Concern / Follow-up:			
Results of Follow-up:			
Suggested Areas of Future Focus:			

3. Questions to Ask Yourself

- What story does the historical financial data and trends **tell about this agency** and what it has been through?
- What **story** does the budget for this agency tell about **where the agency is going**?
- What about this agency are we interested in **learning more about**?
- What do I know about the agency's financial management **capacity and philosophy**?
- How would this information **shape my conversation** with an agency?



4. Questions to Ask the Agency

- What if anything is **puzzling** to you, what are you **curious** about, is anything **causing you concern**?
- What do you view as your greatest **risks and opportunities**?
- Where are you **weak and strong** programmatically and operationally, and how does that **affect** your financial performance?
- Where do you need to **build financial capacity** to generate and grow programmatic impact?
- What have you learned from your **review and analysis** of the agency-wide budget?
- What do you need financially need to ensure **program results** are reached?
- How does your **revenue mix** help to ensure your long-term **sustainability**?
- How do you measure your program results and social **return on investment**?
- What would you do if you had more **time, control, or money**?
- What is the best balance for **reserves** in the face of what the agency seeks to achieve in results?





Exercise Part #3

Think about your next financial management conversation with a CAA.

What outcome do you hope to achieve through your interaction?

Given what we've discussed today, what is one thing you will do differently to prepare with a coaching mindset and achieve that outcome?

Write down your reflections on a piece of paper.

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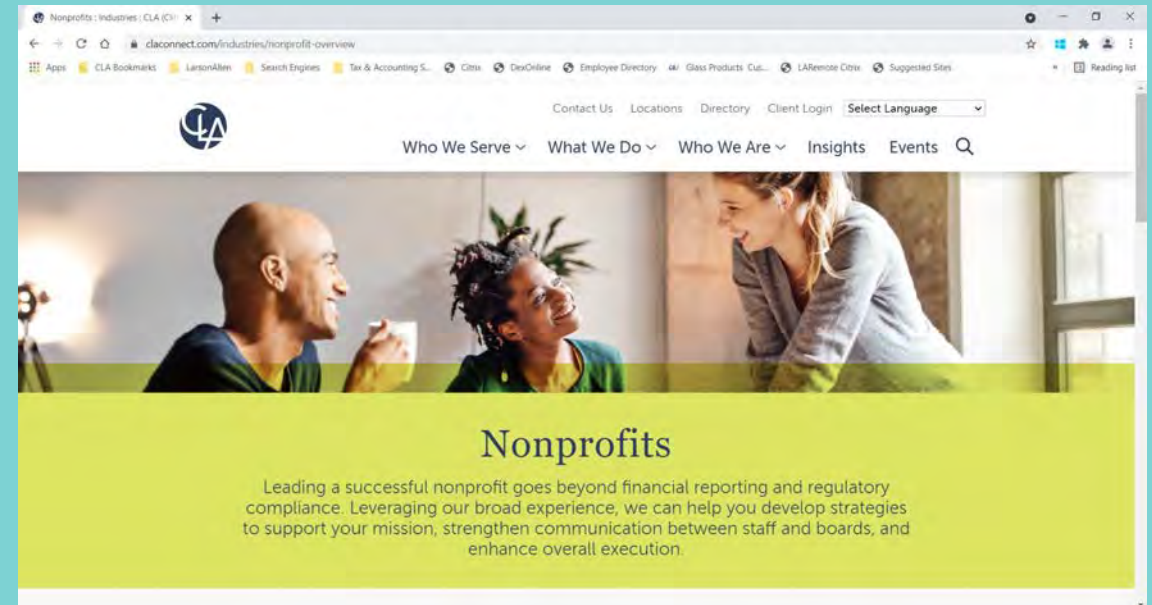
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Remember, You're All Financial Leaders





Time for Q & A

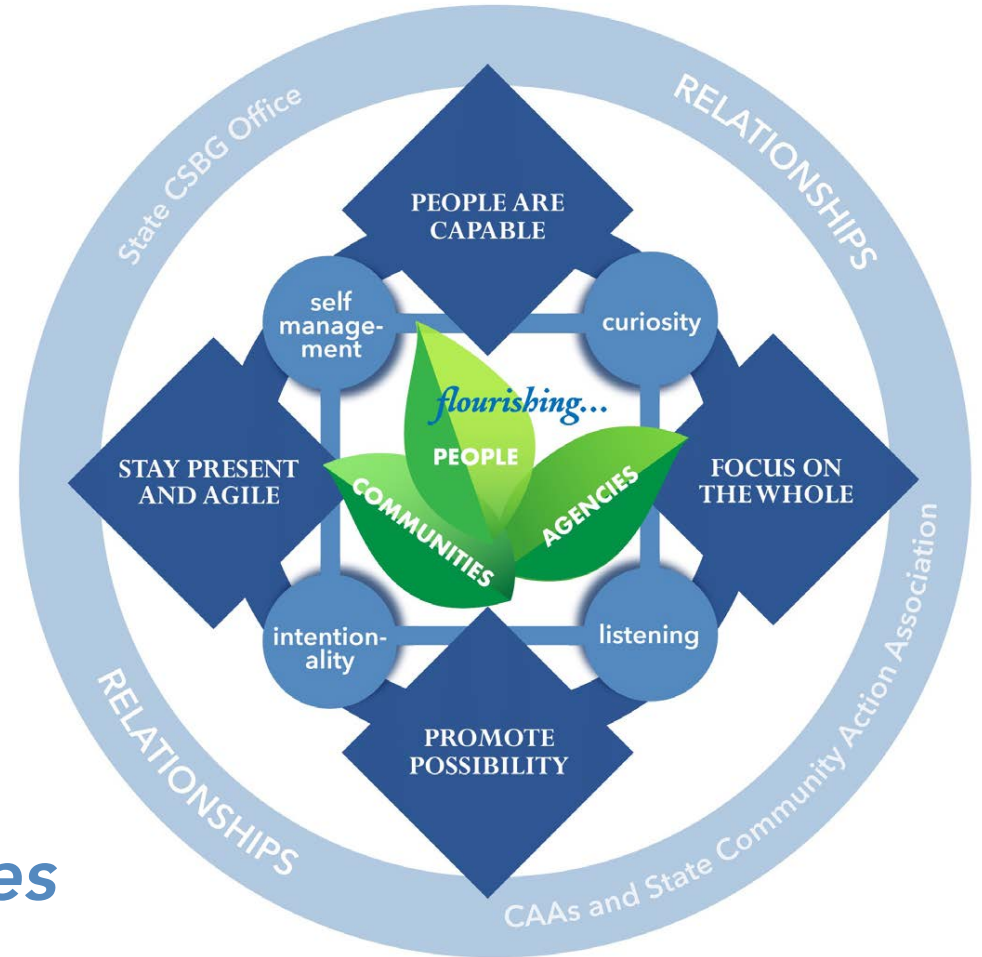
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Questions/Discussion

- Questions
- Discussion

*Please send input/feedback/examples
to Jeannie*



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**Using a Coaching
Approach to
Improve Results: A
Guide for State
CSBG
Administrators**

Coaching Guide Coming Soon!

This guide and the accompanying tools are under development and will be released as this webinar series progresses.



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Thank You for Attending!