
BY SUSAN MANN AND SANDY SMITH

Today's fast-paced world—with back-to-back meetings, pages of emails, and the constant ping of devices—often forces us to focus on the fastest way to meet an urgent need. Coaching is a purposeful connection with another human that supports immediate change and stimulates long-term, sustainable results. Whether by a leader, a peer, or a professional coach, great coaching can feel like magic. But it's not.

This is the journey of the Bill & Melinda Gates Foundation as it geared up for effective use of coaching and better performance.

A professional and peer coaching program at the Bill & Melinda Gates Foundation has improved individual and organizational performance.



expanded COACHING CULTURE drives results

Journey to better coaching

In *Creating a Coaching Culture*, a 2014 Institute for Corporate Productivity report, it says, “If done well, coaching can elevate the productivity and performance of every individual in the organization. And there is a significant correlation between having a strong coaching culture and market performance.”

Although the evidence shows that coaching works, its use isn’t optimized. In a 2014 survey conducted by the Association for Talent Development and reported in *The Coaching Approach: A Key Tool for Successful Managers*, almost three-quarters of respondents (73 percent) indicated that they don’t emphasize coaching in their talent development portfolio.

THE GATES FOUNDATION LOOKS FOR THREE KEY QUALITIES IN PROFESSIONAL COACHES: HIGH COMPETENCE, MEDIUM EGO, AND LOW MAINTENANCE.

The Gates Foundation is the world’s largest private philanthropy, with its headquarters in Seattle and regional offices in Washington, D.C., and six countries. Working with partner organizations around the world, the Gates Foundation focuses on global health and development, as well as improving education in the United States.

Growing quickly after its founding in 2000, the Gates Foundation initially emphasized hiring technical subject matter experts more than hiring great people managers. Similar to many organizations in the past decade, the foundation used professional coaches with limited guidelines. HR often wasn’t involved, coaching goals weren’t consistently established, and leaders sometimes misused coaching by outsourcing difficult performance feedback to external coaches.

Over time it became clear that to achieve the foundation’s aspirations, we had to cultivate relationship skills such as collaboration, empathy, and giving and receiving feedback. Through 2008 and 2009, the Gates Foundation

identified a strategic goal to enhance management effectiveness, including boosting skills to coach teams and individuals. In the years since, we’ve built several gears that work together to drive results: program management, professional coaching, peer coaching, and on-the-job application.

Program management

Professional coaching is one method in the organization’s talent strategy, along with leadership and management development programs, performance management, 360-degree feedback, competencies, and other learning approaches. Responding to heightened organizational needs, in 2009 the HR team partnered with key leaders and studied best practice research regarding the use of external coaches.

Now six years since establishing our professional coaching program, we continue to refine it and learn from experience. We’ve found that these elements are essential for success:

- central program management and evaluation
- engagement methodology focused on return on expectations
- employee (coachee) readiness and follow-through
- talented coaches with significant experience
- a coordinated team (manager, HR business partners, learning and development, coach) working together to support employee growth.

The learning and development team centrally manages the professional coaching program and screens, selects, and orients the pool of professional coaches. Partnering closely with HR business partners (HRBPs), we work to ensure a solid return on coaching investment through clear expectations and evaluating the results achieved.

We have found that the investment in professional coaching is best made when the employee is already an effective contributor, with the opportunity to grow skills in particular areas and with the potential to advance to a more responsible role. Coaching also can be

useful to help leaders transition successfully into new roles. The use of professional coaches is a supplement to, not a replacement for, honest and active feedback and ongoing performance coaching from the manager.

The Gates Foundation generally reserves professional coaching for those in management and leadership roles. Occasionally those in highly specialized technical roles receive coaching, particularly when the span of influence and need to collaborate is high.

Professional coaching

To measure the effectiveness of the professional coaching program and the outcomes of each engagement, we have found it helpful to have a solid methodology. At the Gates Foundation, there are three phases: scoping and selection, coaching engagement, and conclusion and evaluation.

The most successful coaching engagements leverage great teamwork, with the employee, her manager, the coach, and the HRBP all understanding their roles and delivering in a committed way. The sidebar on page 40 provides a summary of each step in the engagement, and for what each role is responsible.

Reflecting on her experience of working

with a professional coach in 2014, one foundation manager captured well what a talented coach does: “I was struggling with a challenging project. Having the perspective of a coach who knew our culture and who brought a neutral, outside perspective was incredibly valuable. My coach helped me clarify my leadership values and step back and better understand the dynamics. I moved from feeling powerless and stuck to understanding that I had choices about how to move forward.”

The Gates Foundation looks for three key qualities in professional coaches: high competence, medium ego, and low maintenance.

High competence. This quality requires coaching skills borne of business acumen, coach training certification, emotional intelligence, resources to support employee growth, and a repeatable methodology that generates measurable results. All coaches adhere to a strict ethical and confidentiality standard in the code of ethics established by the International Coach Federation.

Medium ego. Great coaches are confident in their capabilities and also work well in a team where others may be the decision makers. A generous spirit and superb collaboration support successful return on expectations.



COMPARED WITH THEIR PEERS, GEAR UP GRADUATES HAVE HIGHER RATES OF RETENTION AND PROMOTION.

Three Phases of Professional Coaching Engagements

Phase 1: Scoping, Selection, Contracting

- Employee and manager discuss professional development goals.
- Manager and HR business partner (HRBP) determine employee's eligibility and whether coaching is the right method to address goals.
- HRBP gives employee the bios of up to three coaches from the approved central list.
- Employee interviews coaches, makes selection, and notifies HRBP.
- HRBP and coach establish engagement parameters using a template provided by the learning and development team.

Phase 2: Coaching Engagement

- Employee, manager, and coach align on specific expectations for coaching engagement outcomes.
- Employee and coach draft development expectations and how they will be measured.
 - Typical engagement is 10 to 15 coaching sessions over a period of six to nine months.
 - Leverage 360-degree feedback, stakeholder interviews, and other growth tools.
 - Supported by the coach, the employee gains new skills and knowledge and practices new behaviors.
 - Coach and employee monitor progress and refine the plan to deliver on expectations.
 - Occasional check-ins with manager and HRBP, honoring coach-client confidentiality.
- Manager gives performance feedback and on-the-job coaching to employee throughout coaching engagement.

Phase 3: Conclusion and Evaluation

- Employee and coach review results achieved (return on expectations) and build practices to sustain growth. Employee reports back to manager on coaching engagement outcomes and next steps.
- Employee evaluates coach. Manager evaluates if expectations were fulfilled. The learning and development team uses data to evaluate and refine the coaching program.

Low maintenance. The coach invests in learning “how it’s done here.” She works hard to make it easy for others by being available for meetings during nonstandard hours and flexing her style effectively with a wide variety of clients.

Peer coaching

By 2010, the Gates Foundation had a management effectiveness and coaching strategy in place and a pool of well-vetted professional coaches. That positioned us in 2012 to launch a cohort management development program, co-founded by us, to elevate skills across the organization more consistently. Called Gear Up, the program leverages professional coaches who facilitate monthly modules of cadres made up of eight to 10 people. Each cadre represents an intentionally mixed group of various levels of leaders and different teams.

Gear Up participants are all strong performers with at least one year of service with the Gates Foundation and have completed 12 hours of management training, including a half-day coaching workshop. Through their 10 months in Gear Up, participants grow through individual and group coaching provided by a professional coach coupled with the community-building support of peer coaching in a trusting environment.

Covering topics that include authentic leadership, courageous conversations, and global mindset, the peer coaching embedded in Gear Up modules provides the opportunity for participants’ skills and confidence to grow. One participant says, “My most impressive learning was through the professional coach and peer-to-peer coaching from my cadre. It was so easy to be able to apply my learning in my day-to-day experiences and report back my progress for additional feedback from my peers.”

On-the-job application

Whether insights emerge in a one-on-one meeting with a professional coach or from being coached by a manager or peer, what really matters is taking action back on the job. Part of the “go, no go” decision about receiving professional coaching or participating in Gear Up

depends on whether the employee has the desire and ability to commit to the coaching process through self-awareness, feedback, and practice. If not, the coaching process is likely to be frustrating and ineffective.

We continue to focus on building the accountability loop. At the end of every Gear Up cadre session, each person makes a commitment to an experiment he will do on the job before the next session a month later, such as initiating a career development dialogue with a team member. This accountability for immediate application generates traction, and leads into a reflection activity at the beginning of the next month's cadre session during which participants share what worked, what didn't work, and what they learned.

In the end, regardless of the enthusiastic support of the manager, the coach, and peers, it is up to the employee to follow through and take action for enhanced performance. As she does, there's a virtuous cycle that supports behavior change. The rewards of goal attainment and improved working relationships fuel greater accomplishments.

One person who received professional and peer coaching through the Gear Up program recently said, "The key to all of this is to go back to work and apply what I'm learning on

the job. It's becoming more of a habit to do that and I'm seeing the positive results."

Positive coaching culture

In addition to these positive testimonials, the Gates Foundation is seeing the benefits of expanding its coaching culture. An evaluation of the first two cohorts shows that, compared with their peers, Gear Up graduates have higher rates of retention and promotion.

We are finding that professional and peer coaching produces more effective managers who are better coaches, and that leads to improved individual and organizational performance. At the Gates Foundation, coaching is a key element of the talent development strategy that is worth investing in.

■ **Susan Mann** is director of learning and development and a leadership coach at the Bill & Melinda Gates Foundation, where she oversees talent development; susan.mann@gatesfoundation.org.

■ **Sandy Smith** is a master credentialed coach with numerous engagements at the Gates Foundation, and a senior faculty member at the Hudson Institute of Coaching; sandy@sksmithcom.

The Bill & Melinda Gates Foundation is a member of the ATD Forum (www.td.org/forum).

Coaching Resources From ATD

The Coaching Approach: A Key Tool for Successful Managers

This ATD Research report aims to examine the use of coaching as a managerial tool and provides insights on how learning leaders can more effectively develop and sustain successful coaching programs.

Coaching Training

Coaching Training, the third book in the ATD Workshop Series, takes a service-oriented approach to workplace coaching. It teaches the essential skills trainers must master to give learners what they

need when they need it. Each half-day, full-day, and two-day program in this volume comes with its own agenda to drive the workshop and includes online presentation slides, handouts, assessments, and tools.

Coaching Certificate Program

Participants will learn a model that outlines a coaching process they can use with individuals, teams, or an entire organization, and will practice foundational coaching competencies through role plays, group exercises, and case studies.

"Creating an Internal Coaching Program"

This issue of *TD at Work* defines internal coaching and explains how it is unique; explains the benefits of internal coaching for coach, coachee, the talent development function, and the organization as a whole; shows the types of coaching programs that can be implemented with internal coaches; and provides case studies about different types of internal coaching programs.

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Prices valid through December 31, 2015. *TD* magazine is published by the Association for Talent Development, formerly ASTD.

071426.31610

Order online at www.td.org/tdsub

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Association for
Talent Development