

PEER COACHING GUIDE

A TOOLKIT FOR FUNDERS

Exponent Philanthropy thanks Jen Lachman of Lachman Consulting for her expertise and guidance as we prepared this guide.

Peer coaching is a unique opportunity to build stronger connections with other lean funders. Through peer coaching, you'll gain insights to elevate your individual and collective work in philanthropy. Use this guide to help you prepare, process and reflect upon your experiences during peer coaching.

To begin, identify two or three peers to meet with over the next three months. As an Exponent member, you can post to the Community Discussion List, search the Member Directory, or reach out to our staff to help you identify peers.

Once your group is confirmed, you will meet virtually every three weeks for a total of four or five sessions. Think about how listening to and getting support from these individuals can move you to what's next for you and your giving journey.

Coaching Focus/Agenda

Take a few minutes to jot down one or two challenges or opportunities you'd like to move forward in the coming months. Ask yourself, "If this coaching were to have a profound impact on my work or life, what would be different?"

Coaching Partners & Session Dates

Name: _____

Name: _____

Name: _____

Dates For My Phone Sessions With Peers

Session 1: _____

Session 2: _____

Session 3: _____

Session 4: _____

Session 5: _____

Session Agenda

Each participant has 20 minutes to be coached and work on their issue.

Each coachee decides what they need from each session, and should make it clear to their peers at the start, for example:

- “Today, I'd prefer if you could please listen and ask questions, rather than give advice.”
- “Today, I need your ideas and advice.”

Coaching time is broken down as follows for each participant:

4 minutes: The coachee describes the situation or opportunity and context. (*What are your challenges? What new opportunities do you see? What have you tried already? What kind of help do you need?*)

3 minutes: Coaches ask clarifying questions. The coachee responds.

10 minutes: Together, the coaches generate questions, reflections, ideas and suggestions. The coachee listens silently and takes notes. (If in person, the coachee turns around with their back to the group.)

3 minutes: The coachee shares what was most valuable, and how they're thinking about integrating what they heard into next steps. (If in person, the coachee returns facing the group.)

After each participant has had the opportunity to be coached, take five minutes to reflect as a group on:

- What went well today?
- What would the group like to do differently at your next session?

Between sessions, track ideas, learnings and goals with the “Coaching Conversation Prep Worksheet” on the next page.

Coaching Conversation Prep Worksheet

Date of your next peer coaching session: _____

1. What commitments did I make in our last coaching session (if relevant)? How are they coming along?

2. What challenges or updates have happened since our last conversation that I want you to know about?

3. What do I want to focus on during our next coaching session?

4. What do I specifically want from my coaches at our next coaching session? For example, to be encouraged, to be held accountable, to explore new perspectives, etc.

5. What is one thing I am appreciative of or grateful for?

6. What else?

Practices & Tips for Peer Coaching

Be present

In coaching conversations, being present helps shift the focus from yourself to the coachee. Try eliminating distractions, taking a few deep breaths, or going for a walk. Slow your stroll, taking in the world around you. By slowing down, you can focus on and operate in the here and now.

Listen deeply

Commit to bringing your highest quality of listening to every conversation. Listening is an essential skill for effective philanthropy, but few of us are ever trained to do it well. Here are three levels of listening from the Co-Active Training Institute (formerly the Coaches Training Institute):

Level 1: internal listening

- Awareness is on me, the listener. I'm hearing my thoughts, my feelings, my ideas, and my judgments.
- I'm asking myself, "What does this mean to me?"
- At this level of listening, you may be listening to respond.

Level 2: focused listening

- I lose all awareness of self at this level of listening. I have laser focus on the other person.
- I notice what the other person is saying and not saying (emotions, energy and body language.)
- Focused listening allows us to hear people in a much deeper way.

Level 3: global listening

- I have a 360-degree soft focus when I'm listening globally.
- I'm listening to everything I can observe with my senses—the person talking, myself and the environment.
- Global listening gives you greater access to your senses and intuition.

Tune your listening levels to 2 and 3. Every time you shift into level 1, notice the disconnection and return your focus to the person on the phone or across from you.

As you engage in peer coaching, reflect on what you're learning about yourself and deep listening:

- When do you get stuck in level 1 listening?
- What helps you to shift into levels 2 and 3?
- How does your physical environment and mental state affect your listening?
- Do you have an easier or more difficult time listening to certain people?

Ask powerful questions

Asking powerful questions will lead to unexpected places. Powerful questions can open up relationships in ways you never thought possible. Peer coaching is an opportunity to live in the moment together for the sake of curiosity, building the relationship and practicing skills.

Along the way, here are a few things to keep in mind:

- Don't overthink it! Simple questions often have the most impact.
- Asking powerful questions may require spending a little more time in conversation.
- Now and then, you might feel awkward. There may be long silences. Embrace these uncomfortable moments. They're opportunities to learn and grow.
- Set aside your agenda.
- What questions do you think had the most impact? How do you know?

Be curious & interested in your coachee

Get curious about your coachee (not the story!) What do you want to know about this person as they share? What are you learning about this person? What more would you like to explore together?

Strive for this level of curiosity when asking questions or making observations. Consider saying or asking:

- "Wow! It sounds like you're ready for a change." (Or whatever applies.)
- "What's this situation really about for you?"
- "What's most important to you here?"
- "When you look back on this challenge in five years, what do you want to say about yourself?"

Embrace silence

Whenever the conversation fizzles out...be patient and present. Sit with the silence and watch what unfolds.

If this makes you uncomfortable, try welcoming silence with two or three deep breaths. Think through

- What does it feel like to sit with silence?
- What do I notice? About me? The other person? My environment?
- What's surprising me?

Reflect on:

- What did I learn about silence?
- What did I learn about myself?
- What do I want to carry with me from this experience?

Invite a sense of wonder

Seize opportunities big and small to explore possibility. Wonder *what if* together with your peers. Observe how they and you react. Note where the conversation takes you.

Possible questions:

- What if...?
- What if we didn't...?
- What might happen if...?
- What would it feel/look like to...?
- What would be possible if...?

Make time for reflection

You can deepen and extend what you're learning in peer coaching by taking time to process and appreciate where you were, where you've been, and how far you've come. Strive for change by making time to reflect.

Here are some ideas for cultivating reflection in your life and work:

Timing:

- Give yourself permission to make time for reflection.
- Block out 50-60 minutes on your calendar.
- Play with timing to hone in on what works best for your mind and body. When do you find yourself most reflective? When you first wake up? At the end of the work day? Before bed? After a long walk? A good workout? Whenever inspiration strikes?

Location:

- What spaces get you in a reflective mood or mindset?
- Find a quiet and/or inspirational space.
- Seek out white noise, or try a space with soft chatter in the background.
- Ideas: your favorite chair, in front of a large window, at a coffee shop, on a park bench, during a hike in the woods, at a museum, or near water.

Methodology:

- Let your thoughts flow without judgment.
- Allow yourself to think or write down whatever comes to mind.
- Use deep breathing or meditation to quiet your mind. See "[How to Meditate](#)".
- Activate your mind with exercise.
- Carry around a journal to write whenever the mood strikes.
- Record your thoughts out loud with a recorder, or a transcription app on your phone.
- Go crazy on a whiteboard or a big sheet of paper in the office.
- Draw, paint or color.

There's no right or wrong way to reflect—the important thing is that you make time to do it. Channel what you've learned about listening to yourself and building awareness.

- What's going on in my mind?
- What's my body saying?
- What do I feel in my heart?
- How's my breathing in this moment?

Once you've made time for reflection, start thinking about how you can carry forward your experiences and learnings in your peer coaching sessions.

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