

Self-Coaching Strategies *for* Nonprofit Leaders

by Jean Lobell, Pavitra Menon, and Mohan Sikka



Editors' note: This article was adapted from *Meeting the Job Challenges of Nonprofit Leaders: A Fieldbook on Strategies and Actions* (Center for Creative Leadership, January 2015; www.ccl.org).

THERE IS NOTHING LIKE UNDERSTANDING THAT your decisions and actions will be consequential to reinforcing learning. Therefore, learning on the job, with a lot of feedback and reflection, can be a very rich source of leadership and management development. Research reinforces over and over the value of learning through risk taking and reflection, but how exactly do we construct the cycles of consideration in our experiences to encourage continuous and humble but increasingly confident development?

This article addresses some just-in-time leadership development strategies that can provide nonprofit leaders with opportunities to shift their perspective on things and stretch their current repertoire of practices and competencies. It is a guide to self-coaching on leadership and management issues. The leadership issues revolve around driving change, aligning programs with mission, thinking generatively, creating a desired culture, developing strategic partnerships, and understanding one's impact on others. The management issues revolve around getting to results, developing tactical solutions, supervising individuals and teams, and managing resources.

At Community Resource Exchange (CRE), our approach is based on the belief borne of experience that individuals can make significant changes *on their own* if equipped with the right tools, which include the following:

- The right questions to ask of themselves;
- Some turnkey practices and tactics; and
- Relevant application tools for specific issues.

Our aim is to provide nonprofit leaders with tools incorporating these elements so they can self-coach and learn from actions they take *while on the job*. In that self-coaching they must engage in *reframing* and "1-2-3" steps.

Reframing. Reframing is a common coaching methodology. The ability to shift one's perspective or paradigm can unlock a fresh approach to a daunting challenge. A nonprofit leader can learn to develop the art of reframing situations

and problems so that new solutions emerge.

"1-2-3" Steps. The idea of "low-hanging fruit" led us to the notion of taking the first few relatively easy actions that one can take to address a given challenge. These steps move a leader from understanding to action and change, and are akin to "application assignments" that are used in coaching and action learning. Some of them contain self-training and self-learning components.

But these actions should be informed by what we call *relevant application tools*.

You will see this approach reflected in the examples provided over the next pages. The challenges portrayed in those examples are not simple or linear. As is true in the nonprofit leader's world, they are multidimensional and complex. There is no one solution, and certainly no magic bullet to address them. You will note, as well, that some of the strategies we propose dovetail one with the other, and, at times, a strategy can apply to several challenges.

Our hope is to create an avenue for the nonprofit leader to begin addressing those challenges on his or her own and in his or her workplace. There are "low-hanging" developmental opportunities one can find within oneself, within the workplace, and among one's network of colleagues and friends.

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Leadership and management development can be achieved effectively while on the job through self-coaching. Equipped with the right tools and strategies such as reframing an issue, shifting one's perspective to consider a fresh approach to a daunting challenge, and beginning to tackle a problem by taking some preliminary first steps, individuals can embark on a journey of continuous, confident self-development.



Managing Individual Performance

Issue: Sustaining high performance standards so that staff members achieve program and organizational goals can be challenging in organizational cultures where there is a push and pull between getting to results and maintaining an engaged and supportive environment for staff.

Why it matters: Holding staff accountable for results is key to sustaining organizational effectiveness and achieving outcomes. In addition, it would be a disservice to the staff's professional growth if the leader failed to do so.

"Deliver or else . . .???"

Sashi is the executive director of an organization that helps Asian women (primarily of South Asian descent) who are victims of domestic abuse.

With a small budget of \$300,000, the organization has programs ranging from a transitional home for displaced women and children, counseling services for battered women, a legal initiative that provides free legal clinics to women who cannot otherwise afford legal counsel, support groups to help women overcome abuse, and a public initiative that educates the broader community and law enforcement personnel on how the cultural norms and social values unique to this community impact women facing domestic abuse.

The organization does a lot with very little, and relies heavily on its staff and volunteers to get the work done. In addition, staff members are not paid well in comparison with other larger nonprofits that do domestic violence work or state agencies that support this work on a statewide basis. Staff members and volunteers are from the community; some are, themselves, survivors of domestic abuse or have other difficult personal circumstances. While dedicated to the mission, many staff members do not perform at the level necessary to get all the work done. In addition, holding volunteers accountable—given they are unpaid—is challenging. Sashi is acutely aware of this fact, and she feels ambivalent about holding her staff and volunteers to the required performance levels, knowing their personal circumstances and their relatively low or nonexistent salaries.

To address the challenge of managing individual performance, Sashi tried the following approaches, with good results:

| Reframing | "1-2-3" Steps | Off-the-Job Resources |
|---|--|--|
| <p>Broaden one's perspective on staff engagement and support to include fostering high performance.</p> <p><i>In her one-on-one supervisory meetings, Sashi shared her perspective and engaged the staff in exploring how to shore up their performance. She gave the same message in her discussions with volunteers.</i></p> <p>Redefine "holding staff accountable" as a responsibility owed to staff.</p> <p><i>Sashi began to see that she had been selling her staff short when she demonstrated ambivalence about expecting them to perform against standards.</i></p> | <p>Align mission with departmental goals that translate to individual goals and objectives.</p> <p><i>Sashi worked with each staff member and volunteer to finalize individual goals for every quarter and a timeline for achievement. She also established where they needed support, and put the necessary systems in place. She discussed with volunteers mutually fulfilling ways in which they wanted to be leveraged.</i></p> <p>Be consistent about assessing performance against goals and expectations.</p> <p><i>She consistently reviewed progress against goals at one-to-one supervision meetings. She established clear criteria for success and consequences for not meeting goals.</i></p> | <p>Meet with colleagues in organizations who employ former clients/participants as staff and volunteers.</p> <p><i>Sashi established regular communication with a former colleague who runs a rape crisis and antiviolence support center, to learn about the approaches her colleague used to hold staff and volunteers accountable for results.</i></p> <p>Read articles about managing performance and handling underperformers.</p> <p><i>Sashi went to the websites of professional organizations focused on human resources management to locate articles that might give her perspective and strategies to address her challenge.</i></p> |

MANAGING INDIVIDUAL PERFORMANCE

TURNKEY COMPETENCIES, SKILLS, AND KNOWLEDGE

- Aligning mission, program strategies, and individual goals
- Communicating feedback in a way that gets heard and motivates staff to perform better
- Setting goals and planning a course of action to ensure that work is performed effectively and completed efficiently
- Conducting effective performance discussions during supervisory meetings and the annual performance review
- Engaging and managing volunteers

RESOURCES

Books

- Rock, David. "Using the Six Steps to Give Feedback." In *Quiet Leadership: Six Steps to Transforming Performance at Work*, 203–15. New York: HarperCollins, 2006.
- Wakefield, Michael. "Brief Solution-Focused Coaching." In *The CCL Handbook of Coaching: A Guide for the Leader Coach*, edited by Sharon Ting and Peter Scisco, 286–311. San Francisco: Jossey-Bass, 2006.
- McLagan, Patricia, and Peter Krembs. *On-the-Level: Performance Communication that Works*. 3rd ed. San Francisco: Berrett-Koehler, 1995.
- Kaplan, Robert E. *Forceful Leadership and Enabling Leadership: You Can Do Both*. Greensboro, NC: Center for Creative Leadership, 1996.
- Wittich, Bill. *Keep Those Volunteers Around: A Dozen Easy Tips to Excite, Inspire, & Retain Your Most Valuable Asset . . . Volunteers*. Fullerton, CA: Knowledge Transfer Publishing, 2002.
- Phoel, Cynthia Morrison, et al. *HBR Guide to Giving Effective Feedback*. Boston, MA: Harvard Business School Review, 2011.

Worksheets and Diagrams

- Human Resources at MIT. "Option 1: Preparing Your Professional Development Goal." hrweb.mit.edu/system/files/all/other/pd_goal_templates.pdf.
- Williams, Paul, and Shannon Jones. "Osborn: Creative Problem Solving Process." *Idea Sandbox*, October 9, 2007. www.idea-sandbox.com/destination/2007/10/osborn-creative-problem-solving-process/.

Managing Suboptimal Infrastructure

Issue: Nonprofits often lack resources to invest in systems that improve efficiency in the long run, such as finance, human resources, information technology, and knowledge management; they have to manage these functions on an ad hoc basis.

Why it matters: Nonprofits must get to results and manage program and operations even amidst these gaps.



“Sometimes we hold it together with spit and baling wire.”

Hector is the relatively new program director of a small community-based preventive services agency providing parent education, counseling, and casework to prevent children going into the foster care system.

As the organization is funded and subject to review by a government agency, employees are required to meet various protocols and standards, such as maintaining two contact sessions per week for each client, submitting case notes within twenty-four hours, and weekly clinical supervision.

Hector found that his agency's internal systems and processes, especially IT and HR, were not organized to support the government agency's protocols, resulting in staff who sought to comply with these requirements feeling overwhelmed by the paperwork and sometimes resigning as a result. In a few cases, he also discovered the troubling practice of staff indicating client contact simply to meet the reporting requirements. Without a full-time HR manager, dealing with personnel and disciplinary challenges became an ongoing headache. At the agency level, they were falling behind on timely and accurate contract deliverables and at risk of losing their contract.

To address the challenge of suboptimal infrastructure, Hector tried the following approaches, with good results:

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| Reframing | <p>Shift from siloed roles to shared responsibilities. <i>Hector recognized that the absence of dedicated IT, fiscal, or HR staff meant that there needed to be shared responsibility within the agency for managing these functions.</i></p> <p>Move from sophisticated processes to “good-enough” protocols. <i>He realized that not being able to create perfect systems should not be a stumbling block to trying to improve processes.</i></p> <p>View the absence of systems as a chance to innovate. <i>He began to see how a loosely regulated environment created opportunities for creativity and innovation.</i></p> |
| “1-2-3” Steps | <p>Establish a cross-functional team to determine a workable solution for the agency. <i>After some problem analysis, the team was able to establish a basic level of critical protocols that supported adherence to government agency requirements, while streamlining nonessential guidelines that created a burden on employees.</i></p> <p>Use professional services in the open marketplace, or share back-office functions when it’s impractical to build internal capacity for support functions. <i>Because the agency was too small to hire full-time IT, fiscal, or HR personnel, Hector looked into sharing or outsourcing these functions, and made decisions based on efficiency and ease of service delivery.</i></p> |
| Off-the-Job Resources | <p>Get external training on available tools and technology that can raise internal capacity. <i>Hector and his staff signed up for a free webinar and learned some tools (such as using shared calendars and folders) to streamline communication systems.</i></p> <p>Explore how other organizations have developed innovative client-centered systems. <i>He met with leaders of other nonprofits who have initiated incentives for staff to create client-centered systems.</i></p> |

| MANAGING SUBOPTIMAL INFRASTRUCTURE | |
|--|--|
| TURNKEY COMPETENCIES, SKILLS, AND KNOWLEDGE | |
| <ul style="list-style-type: none"> • Thinking outside the box • Encouraging managers to think beyond a narrow role • Managing teams across functions and roles | |
| RESOURCES | |
| Books | |
| <ul style="list-style-type: none"> • van Oech, Roger. <i>A Whack on the Side of the Head: How You Can Be More Creative</i>. New York: Business Plus, 1998. • Rummler, Geary A., and Alan P. Brache. <i>Improving Performance: How to Manage the White Space on the Organization Chart</i>. 2nd ed. San Francisco: Jossey-Bass, 1995. | |
| Articles | |
| <ul style="list-style-type: none"> • Kanter, Rosabeth Moss. “The Middle Manager as Innovator.” <i>Harvard Business Review</i> 82, no. 7/8 (July-August 2004): 150–61, hbr.org/2004/07/the-middle-manager-as-innovator. • Maletz, Mark C., and Nitin Nohria. “Managing in the Whitespace.” <i>Harvard Business Review</i> 79, no. 2 (February 2001): 103–11, hbr.org/2001/02/managing-in-the-whitespace. | |

Managing Differences

Issue: Nonprofit leaders partner regularly with a complex mix of stakeholders mentioned earlier. Each of these stakeholder groups has its own goals, concerns, and agendas. Nonprofit leaders must be adept in working with individuals and groups who have diverse personalities and work styles, above and beyond differing agendas, interests, and persuasions.

Why it matters: Nonprofit agendas are often cross-sectoral, requiring collaboration with multiple partners for success. A focus on one set of stakeholder interests over others has the potential to distract leaders from mission-critical activities or from the fundamental goal of client impact. Although managing these personality and style differences may be a challenge, such diversity can also be a rich source of stimulating perspectives and creativity. If one can harness this wealth of diverse ideas and approaches, then so much the better for the sector.



“What a cast of characters!”

Clara is the executive director of a large community center based in a major city. The center is known for housing and advising various start-up groups that are trying to establish themselves and then move on to their own offices, as well as for its generous meeting and program facilities. More recently, the center began to develop an advocacy agenda to support immigration reform. Then, other interest groups voiced their desire to be part of the center’s advocacy agenda—more specifically, for the LGBT community and for environmental justice.

As Clara began meeting with the leaders of these groups, their passion and determination for their specific issues became evident. As discussions progressed, a clash of personalities and styles surfaced. In addition, these leaders represented a range of generations, including millennials, Gen Xers, and baby boomers, who are influenced by their period’s economic, political, and social events—resulting in divergent opinions on almost all issues. Their preferred approaches to advocacy and community organizing for immigration reform, LGBT issues, and environmental justice differed, their perspectives about what might work were not always compatible, and their interpersonal styles varied. “What a cast of characters!” Clara thought at first. However, she realized that these leaders cared deeply about issues that mattered to their constituencies. And one thing they had in common was their sense of urgency about the issues they cared about. If she and her small management team could facilitate those meetings in a way that minimized unproductive exchanges and leveraged the strengths of each leader, then they could find ways to support these advocacy concerns.

After some discussions with her management team about the challenge of managing differences, Clara tried the following approaches, with good results:

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|-------------------------------------|--|
| <p>Reframing</p> | <p>Shift “hodge-podge perspective” to finding common ground. <i>Rather than focus on the differences in personality and style, Clara surfaced what they had in common. In addition to a sense of urgency, they all wanted to have a voice in decisions that affected their cause; channels to impact public opinion; and effective ways of mobilizing the community.</i></p> <p>Move from efforts for uniformity to mining the richness of diversity. <i>She discovered that the different perspectives, approaches, and styles complement and supplement each other. It was a safeguard against “groupthink.”</i></p> |
| <p>“1-2-3” Steps</p> | <p>Convene all relevant parties. <i>Clara and her management team convened the key leaders of the three loosely structured advocacy groups. The all-day session resulted in an initial plan on how to approach the development of the center’s advocacy agenda. There was a lot more work to do, but it was a good start.</i></p> <p>Make time to learn more about strategies for managing differences. <i>Clara and her team read a couple of books on the topic and had two discussion sessions to share learning and insights. They then discussed how they might apply those strategies in their future interactions with the advocacy groups.</i></p> |
| <p>Off-the-Job Resources</p> | <p>Meet with the heads of two coalition organizations that work with different groups. <i>She had lunch with two colleagues who lead advocacy coalitions to learn from their experiences in managing different personalities and how to manage conflicts when they arise.</i></p> <p>Do some research on how different styles work. <i>Clara realized she needed a handle on how different interpersonal and communication styles work. She did some research and read articles on how each style prefers to work and how they complement each other.</i></p> |

MANAGING DIFFERENCES

TURNKEY COMPETENCIES, SKILLS, AND KNOWLEDGE

- Finding common ground among different personalities and work styles
- Managing and conducting difficult conversations

RESOURCES

Books

- Runde, Craig E., and Tim A. Flanagan. *Becoming a Conflict Competent Leader: How You and Your Organization Can Manage Conflict Effectively*. 2nd ed. San Francisco: Jossey-Bass, 2013.
- Weisbord, Marvin R. *Discovering Common Ground: How Future Search Conferences Bring People Together to Achieve Breakthrough Innovation, Empowerment, Shared Vision, and Collaborative Action*. San Francisco: Berrett-Koehler, 1992.
- Stone, Douglas, Bruce Patton, and Sheila Heen. *Difficult Conversations: How to Discuss What Matters Most*. New York: Viking, 1999.

“Take me or leave me.”

Bill was hired to be the turnaround artist at a settlement house that was losing programs and revenue under a popular but ineffective outgoing leader. He spent a year leading the board and executive team in identifying the agency’s core lines of business, consolidating programs, and rebuilding funder relationships. Clear performance benchmarks were set for staff at all levels, and those who did not meet expectations were transitioned to different roles or let go.

While performance and revenue began to rebound after a year, morale took a nosedive. When interviewed by a consultant, even high-performing staff complained of Bill’s authoritarian and overly directive style, and of not being listened to when they had good ideas to share. Staff said they were staying because they had a commitment to mission, but several were actively engaged in a job search or updating their resumes. When the consultant shared these results with Bill, his first response was annoyance: “Do they realize what it took to turn this ship around? If they don’t like strong leadership, they are free to work elsewhere.”



Managing Personal Impact and Effectiveness

Issue: Nonprofit leaders tend *not* to make the time to pause and reflect on their own leadership and management style and to consider how this impacts their relationships with clients, colleagues, partners, and other stakeholders.

Why it matters: Experience as well as research show that leaders who are more “behaviorally complex”—that is, those who have greater self-awareness of their own behavior and have built an adaptive style—are more effective in leading others to decisions, sustaining long-term relationships, and getting to results.

On further reflection, and after several discussions with the consultant and his board chair, Bill decided to address the challenge of personal impact and effectiveness. He tried the following approaches, with good results:

| Reframing | “1-2-3” Steps | Off-the-Job Resources |
|--|--|--|
| <p>Make room for a variety of styles, depending on the performer and situation. <i>Bill realized that some staff needed task direction, others needed affirmation and support, and still others needed largely to be left alone. A moment of diagnosis could smooth the way forward.</i></p> <p>Accept shared responsibility for low morale. <i>He acknowledged that his own behavior had a role in creating the current situation and that he himself had room to grow as a leader and human being.</i></p> <p>Realize that assessment and reflection are important precursors to moving strongly ahead. <i>He began to see that rapid and relentless change leaves people depleted, and that moments of recharge and reflection are needed for both personal regrouping and clarifying the best way forward.</i></p> | <p>Use “situational leadership.” <i>Bill began to assess, often with staff’s input, what level of support performers needed for which tasks. This investment in diagnosis, with some check-in moments during supervision, allowed him to modulate his approach from his fallback directive style.</i></p> <p>Make room for openness and direct feedback. <i>He took the lead in showing vulnerability by publicly admitting his blind spots and areas of growth and inviting “feedback without retaliation.” He instituted an “office hours” policy where people could express concerns in private. He took part in a 360° assessment of his leadership skills, and invited other managers to do the same.</i></p> <p>Create structure for reflection and for team building. <i>Bill supported the executive team in developing a quarterly reflection retreat for as long as the agency was in transition. The mandate for the retreat was both strategic assessment and team building.</i></p> | <p>Find an executive coach experienced in relationship skills. <i>Bill engaged the change consultant in an ongoing coaching relationship, with a focus on social-emotional and personal impact skills.</i></p> <p>Create room for personal reflection and renewal. <i>He started to schedule “appointments” with himself to assess his own perspective on things.</i></p> <p>Read about effective interpersonal behaviors. <i>He worked with his coach to identify books and articles related to emotional intelligence and the value of using relationship-building skills at work.</i></p> |

MANAGING PERSONAL IMPACT AND EFFECTIVENESS

TURNKEY COMPETENCIES, SKILLS, AND KNOWLEDGE

- Adapting to staff member’s strengths, motivation, and readiness
- Using emotional intelligence to constructively negotiate one’s own and other people’s emotional state
- Using interpersonal styles and behaviors appropriate to person and situation

RESOURCES

Books

- Lee, Robert J., and Sara N. King. *Discovering the Leader in You: A Guide to Realizing Your Personal Leadership Potential*. San Francisco: Jossey-Bass, 2000.
- Blanchard, Ken H. et al. *Leadership and the One Minute Manager: Increasing Effectiveness through Situational Leadership*. New York: William Morrow, 1985.

Articles

- Buckingham, Marcus. “What Great Managers Do.” *Harvard Business Review* 83, no. 3 (March 2005): 70–79.
- Goleman, Daniel. “What Makes a Leader.” *Harvard Business Review* 76, no. 6 (November–December 1998): 93–102.
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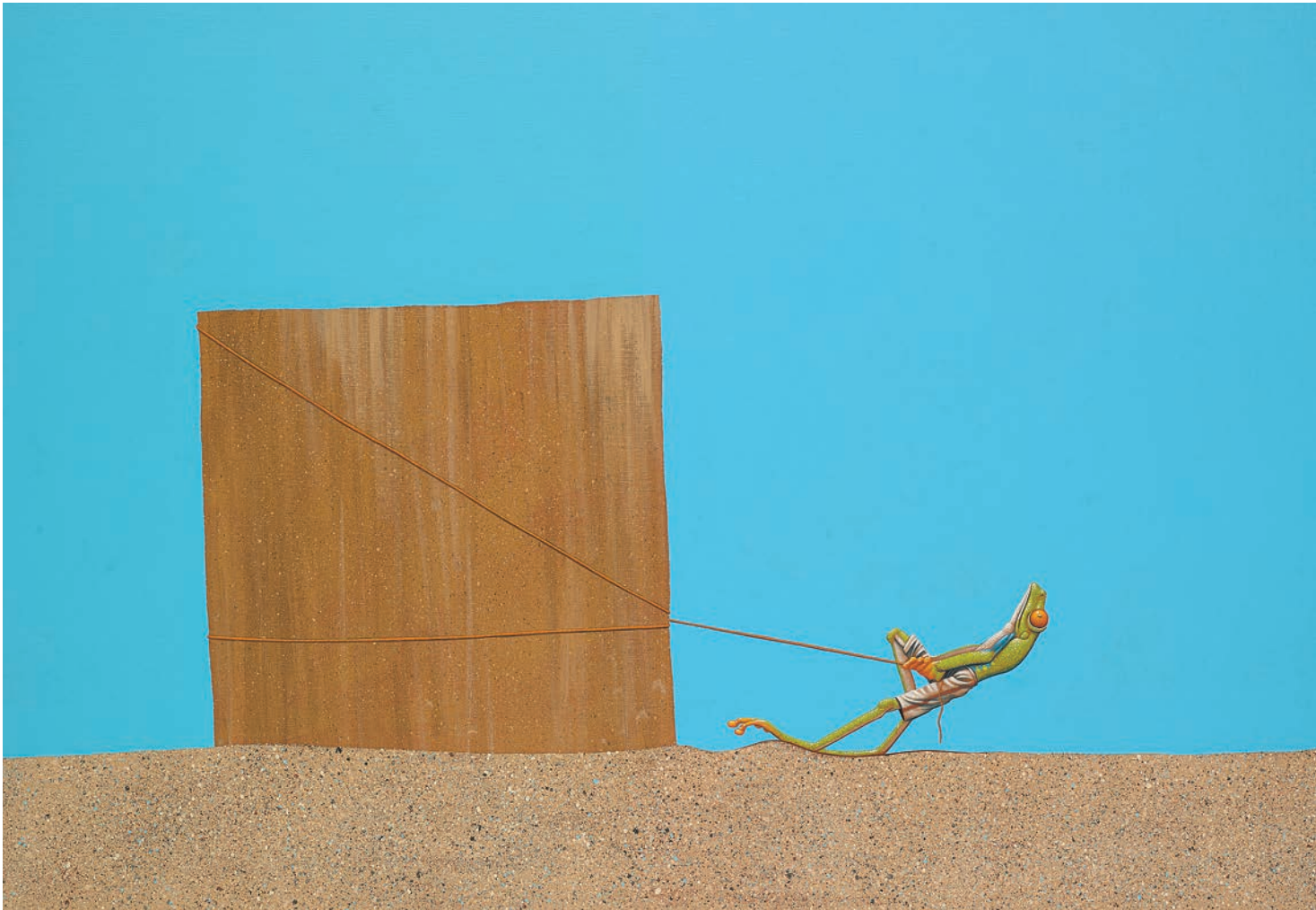
Managing Burnout

Issue: All the challenges that come with functioning in a high-demand, low-resource environment exacerbate the nonprofit leader's level of stress. Additionally, lack of time for self-care impacts the ability to cope with stress.

Why it matters: High, sustained levels of stress have a direct impact on productivity, effectiveness, and the ability to “stay in the game” for the long haul—a combination of symptoms referred to as “burnout.”

“I feel like I’m in a 24/7 spin cycle.”

Brian always prided himself on his stamina for work. As a classic achiever, he thrived on accomplishment; however, after a year of being a new executive director at a grassroots advocacy group, he began to notice some changes in his mood and energy. He wasn't able to sleep well, home and family commitments began to be neglected, and even in “leisure moments,” he found himself thinking about uncompleted tasks and imminent deadlines. Friends told him he looked and sounded anxious, which only added to his stress level. As someone deeply motivated by the mission of his chosen organization, he was surprised to find himself having fantasies of quitting and doing something completely different with his life. After speaking with his mentor about some of his feelings and behavior, Brian realized that he needed to address and manage stress in his life.



To address the challenge of burnout, Brian tried the following approaches, with good results:

| Reframing | "1-2-3" Steps |
|---|---|
| <p>Recognize that being overwhelmed is a choice. <i>In discussions with his mentor, Brian began to notice where he tended to hold onto things he could delegate and where he jumped into a set of tasks without prioritizing.</i></p> <p>Embrace the porous work-home-life boundaries. <i>Brian realized that strict separations between the categories of professional and personal life were not realistic in his role and that he needed a more holistic approach to managing his human needs.</i></p> <p>Make space for the inevitability of challenging moments. <i>Rather than fighting stress whenever it appeared, Brian realized he needed to regulate its amount and frequency.</i></p> <p>Embrace leisure and recreation as a necessary ingredient of productivity. <i>He noticed that downtime allowed him to be more effective in a more sustained way, and this allowed him to see recreation as part of success rather than a deviation from it.</i></p> | <p>Make weekly planning a habit. <i>Brian began to spend his Monday mornings prioritizing and delegating tasks as well as calendaring time for project "hand-over" to other staff.</i></p> <p>Make time for breaks in a long day. <i>Brian began to fit in exercise and even lunch with a friend in the middle of his work day, knowing that waiting for the end of the day was often unrealistic. He did this in a transparent way, so that his staff understood that in his position, his time needed to be flexible.</i></p> <p>Adapt one's working environment to one's human needs where possible. <i>When Brian had an unavoidable conflict between work and family commitments or a packed day with multiple priorities, he began to telecommute from home and attend meetings by phone and Skype. This saved on commuting time and allowed him to balance home and professional spheres more effectively.</i></p> <p>Find a buddy for the moments when stress reaches a red-flag level. <i>He began to become conscious of the days when he had the "pile up" feeling, and made an agreement with a trusted colleague to vent and speak through his priorities before jumping into overdrive. This allowed him to both take a quick break and have space to determine what was truly urgent and what could be reprioritized.</i></p> <p>Make time for—and commit to—vacations where you are unreachable. <i>Starting with small time frames, Brian began to model being away and unreachable. As part of this, he made the up-front commitment to training two senior staff to manage in his absence.</i></p> |

MANAGING BURNOUT

TURNKEY COMPETENCIES, SKILLS, AND KNOWLEDGE

- Effectively managing one's time, attention, and resources to ensure that work is completed efficiently
- Managing stress effectively
- Effectively delegating by allocating decision-making authority and/or task responsibility to (appropriate) others
- Using remote access and telecommuting technologies, including document and calendar sharing

RESOURCES

Books

- Lee, Robert J., and Sara N. King. "Balance Your Work Life and Your Personal Life." In *Discovering the Leader in You: A Guide to Realizing Your Personal Leadership Potential*, 101–34. San Francisco: Jossey-Bass, 2000.
- Lencioni, Patrick M. *Death by Meeting: A Leadership Fable . . . About Solving the Most Painful Problem in Business*. San Francisco: Jossey-Bass, 2004.
- Covey, Stephen R., A. Roger Merrill, and Rebecca R. Merrill. *First Things First: To Live, to Love, to Learn, to Leave a Legacy*. New York: Simon & Schuster, 1994.
- Allen, David. *Getting Things Done: The Art of Stress-Free Productivity*. New York: Vintage, 2001.
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