2023 Chapter Activity Report

*Reporting Period: September 1, 2022 to August 31, 2023*

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## Page: Instructions for Chapter Leaders

All ICF Charter Chapters and Chapters are required to submit a Chapter Activity Report annually in order to comply with their Charter Chapter or Chapter Agreement. The reporting process is an opportunity to reflect on your Chapter’s successes and challenges throughout this calendar year.

Please complete and submit this form by October 31, 2023. In this form, please include information from the reporting period that goes from September 1, 2022 to August 31, 2023. This form must be completed in English.

These Chapter Activity reports are also used to identify high-performing ICF Chapters as part of our Chapter Recognition program. Chapter Recognition entries are evaluated according to ICF’s criteria for high-performing organizations.

As you prepare your report, you may find it helpful to consider these criteria and how your Chapter has demonstrated them over the last year:

* Creates an attractive, credible presence and voice for professional coaching and ICF in local communities
	+ Awards program
	+ Conferences
	+ Peer Coaching programs
	+ Public awareness campaign
	+ ICW events
	+ other
* Advances the profession of Coaching
	+ Pro-bono coaching
	+ Hosting conference
	+ Partnering with other chapters/sponsors/other organizations
* Ensures infrastructure (Membership engagement)
	+ Mentoring to new members
	+ Member recruitment campaign
	+ Member engagement campaign
	+ Member renewal campaign
	+ ICF credential awareness campaign
	+ Communication methods with your Chapter members
* Creates sustainable governance–Creates a robust governance environment that significantly improves performance. Some things to consider:
	+ Governance audit
	+ Leadership team onboarding
	+ Succession plan in place
	+ Strategic plan in place
* Ensures financial viability–Develops and maintains a sustainable, robust financial infrastructure. You might consider:
	+ Executes member recruitment/engagement/renewal campaigns.
	+ Partners with other chapters/sponsors/outside organizations
	+ Any other way of generating non-dues revenue
* Exhibits the following qualities of a high-performing Chapter:
	+ Agile (responsive, nimble, active)
	+ Adaptable (flexible, malleable, adjustable)
	+ Accountable (accepts responsibility for authority granted)
	+ Sustainable (stable, maintainable, defensible)
	+ Caring (kind, thoughtful, compassionate)
	+ Innovative (pioneering, inventive)
	+ Relevant (significant, pertinent, applicable)
* Works towards creating a more diverse, equitable and inclusive coaching profession for all professional coaches and clients worldwide.

**Thank you in advance for the completion of this Activity Report of your chapter!**

## Page: Chapter Contact Information

ICF Chapter \* :\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Information for person submitting report:

First Name \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last Name \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Chapter Leader role \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of ICF Global Members affiliated to Chapter (August 2023) \* \_\_\_\_\_\_\_\_\_\_

(You can find this information in your membership report)

Does your Chapter have an additional chapter fee? \* \_\_\_\_\_\_\_\_

⭘ Yes

⭘ No

Number of ICF Global Members who pay an additional chapter fee. (August 2023) \*: \_\_\_\_\_\_\_

(Your Membership Director will have this information)

How much is the chapter fee? (in US dollars)\*

Does your Chapter have additional categories? \* (student, associate, partner, affiliate, etc)

⭘ Yes

⭘ No

What other categories does your chapter have? and how many in each category?

Please list the categories and the number in each category

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Number of ICF Credential Holders in Chapter (August 2023) \*: \_\_\_\_\_\_\_\_\_\_

## Page: Creates a Credible Voice & Presence in Community - Advances Profession

How many in person activities did your Chapter offer your members during the reporting period? \*

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How many virtual activities did your Chapter offer your members during the reporting period? \*

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How many Core Competency (CC) CCEs did your Chapter offer during the reporting period? \*

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How many Resource Development (RD) CCEs did your Chapter offer during the reporting period? \*

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Has your Chapter offered or participated in an Awards Program? \*

⭘ Yes

⭘ No

Please describe your Chapter's Awards Program. What was the title and goal of the award? How was success measured? Any additional comments? (max.200 words)

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Has your Chapter participated in ICF Global's Credential Awareness campaign? \*

⭘ Yes

⭘ No

Which of these webinars have you offered to your chapter members?

☐ Value of ICF Credentialing

☐ How ICF is Advancing Team Coaching

☐ Nuts and Bolts of Credentialing

☐ The Credentialing Exam and a Closer Look at the Core Competencies

☐ Mentor Coaching/Coaching Supervision

☐ Giving Back through Foundation/Ignite

Value of ICF Credentialing - How many members participated? \*

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How ICF is Advancing Team Coaching - How many members participated? \*

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Nuts and Bolts of Credentialing - How many members participated? \*

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The Credentialing Exam and a Closer Look at the Core Competencies - How many members participated? \*

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Mentor Coaching/Coaching Supervision - How many members participated? \*

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Giving Back through Foundation/Ignite - How many members participated? \*

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Has your Chapter hosted a Conference? \*

⭘ Yes

⭘ No

Please describe your Chapter's conference. What were the learning objectives for the conference? How many people attended? Were CCEs offered? How many? Was this a source of non-dues revenue for the chapter? What was the feedback from the conference? Any additional comments? (max.200 words)

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Has your Chapter offered a peer coaching program (with other chapters or in your chapter)? \*

⭘ Yes

⭘ No

Please describe your Chapter's peer coaching program. When did the program start? For how long is the peer-coaching commitment? What is the goal of the program? How did your chapter measure success? How many coaches participated? What feedback did your chapter receive? (max.200 words)

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Has your Chapter offered pro-bono coaching opportunities to your members? \*

⭘ Yes

⭘ No

Please describe your Chapter's pro-bono coaching initiatives. What are the goals and outcomes of the program(s)? How did your chapter measure success? What feedback did your chapter receive? (max.200 words)

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Has your Chapter exhibited at an event that targeted the business community? \*

⭘ Yes

⭘ No

Please describe your Chapter's event(s) that targeted the business community. What were the outcomes of the event(s)? (max.200 words)

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Has your Chapter participated in a public awareness campaign? \*

⭘ Yes

⭘ No

Please describe your Chapter's public awareness campaign. What are the goals and outcomes of the program? How did your chapter measure success? What feedback did your chapter receive? (max.200 words)

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Did your Chapter participate in ICW (International Coaching Week) events in 2023? \*

⭘ Yes

⭘ No

Please describe your Chapter's ICW events. Did your chapter partner with other chapters to deliver ICW programs? What feedback and other results did your chapter receive? (max.200 words)

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You may upload any documents associated with your Chapter's ICW events here. **The system allows only one file to be uploaded (you may combine more files into one)**

When possible add an explanatory note.

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Did your Chapter partner with another chapter, a Coaching education provider, outside sponsor, and/or outside organization during the reporting period? \*

⭘ Yes

⭘ No

Please list the Coaching Education providers you presented to (virtual and din person) and how many cohorts for each: \*

List the Coaching Education providers' names (local or franchise) and how many groups/cohorts of students you presented to for each.

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In total, how many Coaching students would you estimate your chapter reached out to? \*

Give an approximate number of students that your chapter presented to (adding up all cohorts from different Coaching Education providers)

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How many of these Coaching students turned into ICF Global members? And how many Coaching students turned into chapter members? \*

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Please describe any additional partnerships your Chapter engaged with this year. With whom did your chapter partner? What were the goals and outcomes of the partnership? Is the partnership ongoing? (max. 200 words)

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You may upload any documents associated with your Chapter's partnerships here. When possible, please add an explanatory note. [File Upload] **The system allows only one file to be uploaded (you may combine more files into one)**

Please describe any other program or initiative not described above that you would like us to know about. (max.200 words)

Programs include educations offerings where participants earn CCEs from the reporting period. Initiatives include other projects or offerings by the chapter. Examples of initiatives include: language translations, website design, rebranding, pro-bono coaching initiatives, etc. Some of the questions you could answer for these programs or initiatives include: was the program in person, virtual or hybrid? How many CCEs were offered? Was the program a source of non-dues revenue? What were the goals and outcomes of the program or initiative and how did your chapter measure success? What was the attendance at the program? What was the feedback from the event?

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## Page: Membership Engagement - Ensures Infrastructure

Has your Chapter provided Mentoring/Onboarding to new members? \*

⭘ Yes

⭘ No

Mentoring/Onboarding new members - How does your chapter offer this? \*

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Does your Chapter have a Member Attraction/Recruitment campaign? \*

⭘ Yes

⭘ No

Member Attraction/Recruitment - How does your chapter offer this?

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Does your Chapter have a Member Engagement campaign? \*

⭘ Yes

⭘ No

Membership Engagement - How does your chapter offer this? \*

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Does your Chapter have a website? \*

⭘ Yes

⭘ No

If no Chapter Website - what are your Chapter's plans about this?? \*

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What are your Chapter's communication channels? \*

☐ e-mail

☐ Social Media

☐ Telephone

☐ Regular Mail

☐ Other

Other communication channels your chapter uses?

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Does your Chapter have a Member Renewal campaign? \*

⭘ Yes

⭘ No

Renewal Campaign - What is your Chapter's most successful method to renew members? \*

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Has your Chapter conducted a Membership Satisfaction survey? \*

⭘ Yes

⭘ No

Member Satisfaction Survey - How often does your Chapter conduct a membership satisfaction survey? What has your Chapter learned from the feedback? \*

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Member Survey - You may upload the survey and any results from the survey here.

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Membership Program - Please describe your Chapter's Membership Program. \* (max.200 words)

Please summarize the answers to the above questions in terms of what your Chapter's overall program is for Member Attraction/Recruitment, Engagement, and Retention. You can also upload related documents if needed. **The system allows only one file to be uploaded (you may combine more files into one)**

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Membership Program - You may upload any documents associated with your Chapter's Membership Program here. Maximum size 5MB. [File Upload] **The system allows only one file to be uploaded (you may combine more files into one)**

## Page: Creates Sustainable Governance

Are there any vacancies in your Chapter's board? \*

⭘ Yes

⭘ No

Board Vacancies - Please explain

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Has your Chapter conducted a Governance audit? \*

*A governance audit means a review of how your chapter operations are aligned to: the Chapter Bylaws (and any other governance documents such as a constitution or memorandum of association), the ICF Chapter Agreement; and the ICF Chapter Leader pledge. The audit also aims to identify any areas where your chapter may need to develop or review policies and processes such as: leadership nomination and elections; leadership succession plans; budget and spending; and reporting. The audit could be conducted by a 3rd party or by new members of the Board.*

⭘ Yes

⭘ No

Governance audit - Please explain \*

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Governance - You may upload any documents associated with your Chapter board's governance here.

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Has your Chapter offered the Leadership Team (an) onboarding session(s)?

⭘ Yes

⭘ No

Please describe the way your Board works together

Has your Board received Onboarding Training with your Regional Development Manager? Has your Board completed the mandatory ICF Volunteer Leader Training in the ICF Learning Portal? Please describe the way your Board works together (examples: Board Retreat, monthly meetings, committees, etc). (max.200 words)

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Leadership Team Onboarding session(s) - What are your plans for this? \*

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Chapter Board's Governance - You may upload any documents associated with your Board's Governance here.

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Does your Chapter have a VA (Virtual Assistant)? \*

⭘ Yes

⭘ No

What activities does your VA perform for your Chapter? How many hours per month does your VA work for your Chapter?

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Does your Chapter have a Succession Plan in place? \*

⭘ Yes

⭘ No

Please describe your Chapter's Succession Plan. \* (max.200 words)

*Tips to consider (7 steps to follow when you are succession planning)*

*1. Be proactive with a plan. 2. Pinpoint succession candidates. 3. Let them know and explain the stages. 4. Step up professional development efforts. 5. Do a trial run of your succession plan. 6. Integrate your succession plan into your strategy. 7. Think about your own successor.*

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Succession Plan - You may upload a copy of your Chapter's Succession Plan here . [File Upload] **The system allows only one file to be uploaded (you may combine more files into one)**

How many volunteers do you have in your succession pipeline (as of August 31, 2023) \*

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Does your Chapter have a Strategic Plan in place \*

⭘ Yes

⭘ No

Please describe your Chapter's Strategic Plan \* (max.200 words)

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Strategic Plan - You may upload a copy of your Chapter's Strategic Plan here - [File Upload] **The system allows only one file to be uploaded (you may combine more files into one)**

Does you Chapter have chapter insurance? \*

Select one or more options

☐ General Liability Insurance

☐ Directors and Officers Insurance

☐ Other

☐ For pro-bono coaching programs, do you require your coaches to have professional liability insurance and name your chapter on their insurance?

Which other insurance does your Chapter have?

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## Page: Ensures Financial Viability

Does your Chapter have a bank account? \*

⭘ Yes

⭘ No

What are your plans about having a bank account?

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Does your Chapter manage a BUDGET? \*

⭘ Yes

⭘ No

What are your plans for this?

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What is the CASH balance of your Chapter in US Dollars as of August 31, 2023? \*

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What percentage of your Chapter's revenue comes from non-dues revenue? \*

*The non-dues revenue would be the proceeds that are not the rebates your chapter receives from ICF nor the membership fee your chapter charges.*

Select one option

⭘ 0% - our chapter's only sources of revenue are rebates and local membership fees

⭘ between 0% and 25%

⭘ between 26% and 50%

⭘ between 51% and 75%

⭘ between 76% and 100%

Ensure Chapter's immediate and long-term financial viability \*

Please explain what steps your Chapter has taken during the reporting period to ensure its immediate and long-term financial viability.

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## Page: Core Qualities of a High-Performing Chapter

How does your Chapter exhibit these qualities?

Please write 1 or 2 sentences describing the way your Chapter represents each of these characteristics. If the attribute does not apply to your Chapter, type in "N/A".

AGILE (responsive, nimble, active) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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ADAPTABLE (flexible, malleable, active) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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ACCOUNTABLE (accepts responsibility for authority granted) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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SUSTAINABLE (stable, maintainable, defensible) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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CARING (kind, thoughtful, compassionate) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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INNOVATIVE (pioneering, inventive) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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RELEVANT (significant, pertinent, applicable) - Please write 1 or 2 sentences giving an example of the way your Chapter characterizes this attribute. \*

If the attribute does not apply, please type "N/A".

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## Page: Diversity, Equity, Inclusion & Belonging

Has your chapter incorporated diversity, equity, inclusion or belonging (DEIB) as part of its goals? \*

⭘ Yes

⭘ No

Does your chapter have DEIB related goals? \*

⭘ Yes

⭘ No

Please provide your chapter’s DEIB goals \*

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Did your chapter align its DEIB goals with ICF Global’ s Diversity strategy?

⭘ Yes

⭘ No

⭘ Other

Do you have a member who holds a diversity specific board role? If so, please provide the official board title. \*

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Do you have a diversity mission or vision statement? \*

⭘ Yes

⭘ No

What is your DEIB mission or vision statement? \*

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Did your Chapter offer the ICF Global Cultural Competency Workshop during the reporting period? \*

⭘ Yes

⭘ No

How many attendees participated in the workshop? \*

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What feedback did you receive from this offering? \*

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Did your Chapter offer any other DEIB related activities during the reporting period? \*

⭘ Yes

⭘ No

Please share what DEIB activities/programs your Chapter offered during the reporting period \*

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What are your Chapter's DEIB related accomplishments? \*

List your DEIB related accomplishments

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## Page: ADDITIONAL INSIGHTS about your Chapter

What challenges did your Chapter face during the reporting period and how did your Chapter overcome them? \*

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Is there anything else (successes or otherwise) you'd like to share about your Chapter from the reporting period? \*

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Attach a list of current Board members for your Chapter (including the names and emails for each Board member). \* [File Upload] **The system allows only one file to be uploaded (you may combine more files into one)**

By signing here (typing your full name), you are verifying the accuracy of the information submitted on this form. \*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Page: Submit

If you are not ready to submit at this time:

Click the "save" button below and return to your submission at a later time to complete your report.

The deadline to submit your Chapter Activity Report is October 31, 2023 at 11:59 p.m. (New York). If you have not submitted your report by this deadline, your Chapter will be ineligible for Chapter Recognition consideration.

In order to submit your finalized report, you must click on the “save and finalize” button below. You will not be able to edit any information once you have submitted your form. After submitting your report, you will have the option to print and/or save a copy of the information you submitted for your records.

Click on the "See My Submissions" link after submitting your report.

Should you have any questions, please contact Stephanie Norris, ICF Awards Director and/or your ICF PROFESSIONAL COACHES REGIONAL TEAM.