

2025 - 2027



**ICF New Jersey
STRATEGIC PLAN**

COMMITTEE MEMBERS



Kathleen Cashman-Walter
Andrea Harvey
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Kelli Kombat
Lisa Chenofsky Singer
Mindy Gewirtz

2024 STRATEGIC PLANNING COMMITTEE



**Kathleen
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**Lisa Chenofsky
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Mindy Gewirtz

2025 - 2027 STRATEGIC PLAN



Innovative I.D.E.A.S. Driven Entrepreneurial Communication

EXECUTIVE SUMMARY

This strategic growth plan outlines our vision for the future, centered on *Innovation, I.D.E.A.S.*, an *Entrepreneurial* mindset and communication.

Our goal is to transform the chapter's influence and effectiveness on coaching in New Jersey by focusing on four key areas: Governance and Operations, Technology, Engagement, and Credentialing.

Each of the four focus areas has:

1. Guiding principles
2. 2024 Pre-Work
3. Action items for 2025 - 2027
 - a. 2025 - 2026 Implementation
 - b. 2027 - Review, update and transition
4. Accountability
5. Success Metrics



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Innovative I.D.E.A.S. Driven Entrepreneurial Communication

EXECUTIVE SUMMARY

Based on in-depth research, comprehensive interviews, global insights, and economic and industry projections, we have identified key areas to enhance and grow as a chapter. The outcomes will be:

1. **Leverage Innovation:** Digitize the Chapter's infrastructure to spark a transformative future by streamlining operational, financial, and governance processes into a "one-stop destination experience" for ICF New Jersey members, enabled by cutting-edge technology and AI systems.
2. **Drive Entrepreneurial Engagement:** Design entrepreneurially-based internal and external engagement initiatives that benefit our member coaches, external customers/stakeholders, and ICF New Jersey as an organization.
3. **Create Credential Improvement Plan:** Develop a comprehensive plan that encompasses awareness, education, value, and educational offerings to boost the number of credentialed member coaches and enhance their impact.

ICF Global Strategic Plan



Vision

A world where coaching is integral to transforming societies.

Mission

We advance coaching excellence, impact, and value worldwide.



Selected high-level areas of emphasis for this strategic plan cycle

VISION



MISSION

ICF New Jersey Charter Chapter is the embodiment of coaching as a profession and a source of sustainable impact on individuals and our community.

To lead the advancement of the coaching profession and be the go-to resource for the professional coaching community by:

- Fostering the professional development
- Promoting ways to support business growth.
- Educating the public on the value and impact of coaching
- Acting as a referral source
- Adhering to the ethical guidelines and standards of the International Coaching Federation



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GUIDING CORE VALUES



2025 - 2027 Strategic Plan

ICF GLOBAL

Forward Thinking, Excellence, Humanity,
Connection



ICF NEW JERSEY

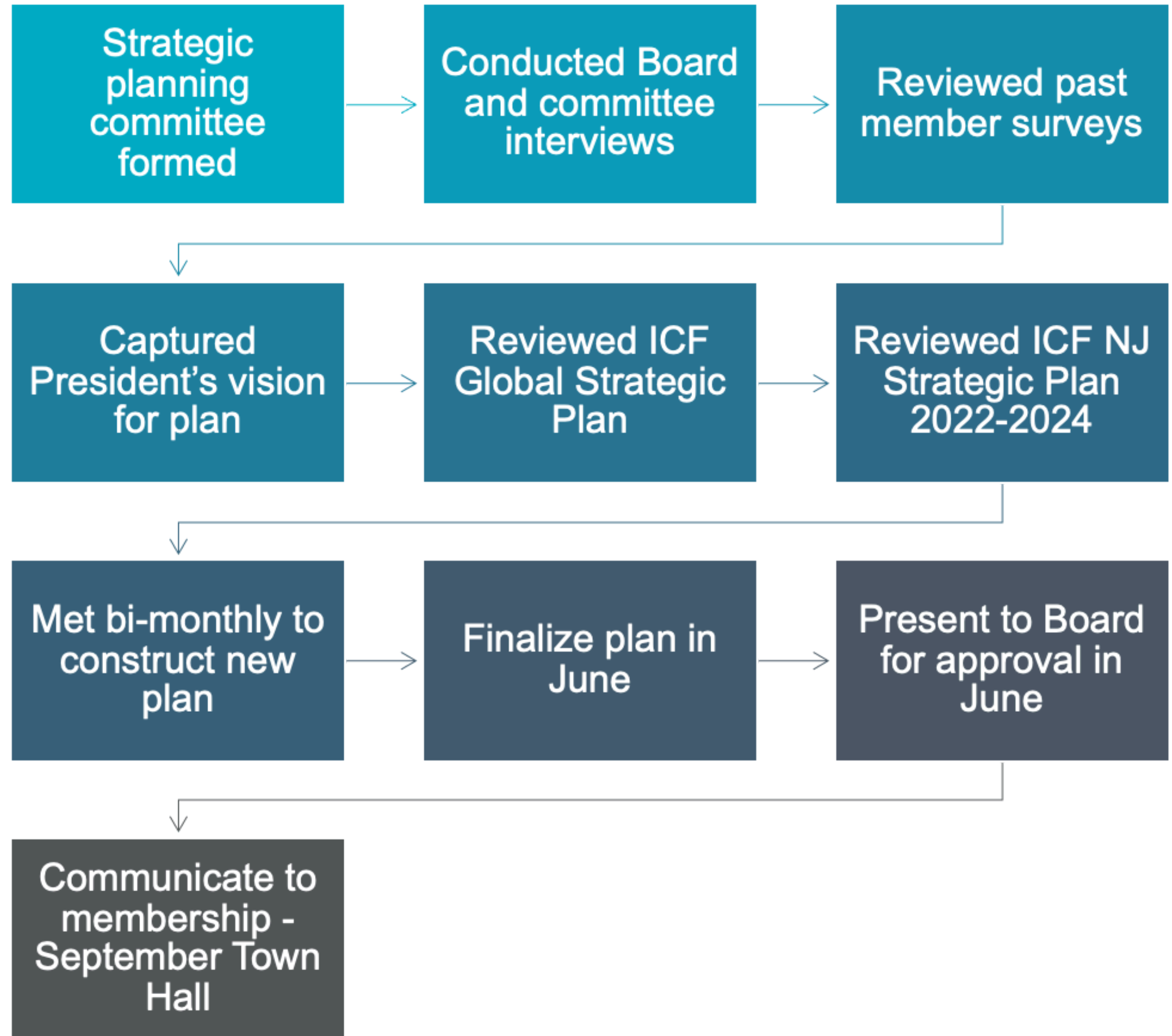
I.D.E.A.S. (*Inclusion, Diversity, Equity, Accessibility, Solidarity*) Innovation, Entrepreneurial spirit and Communication are woven into the entire plan.

VALUES DRIVE DECISION MAKING



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OUR PROCESS



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OUR ASSUMPTIONS



Number of Coaches continues to rise

Demographics becoming more diverse

Average age of coach membership is trending younger

Encore Executive corporate careers coming into coaching

Organizations will continue embracing coaching

World continues to be dynamic/complex and will need coaches' support

Technology continues to rapidly change

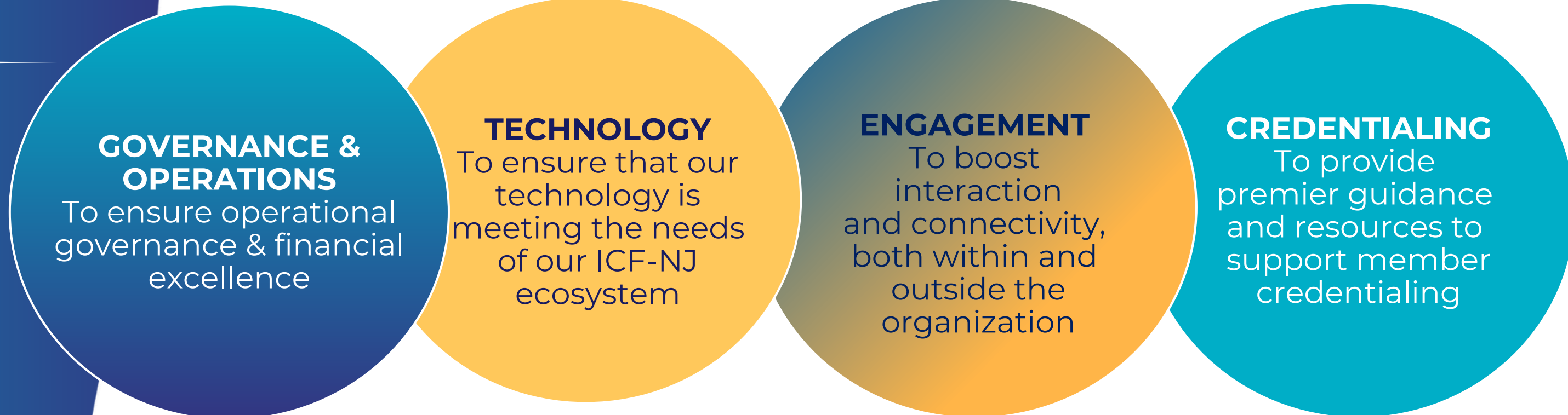
Future of workplace will continue to be hybrid

Relationship between Mental Health space and Coaching is converging



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2025 - 2027 STRATEGIC FOCUS



GOVERNANCE & OPERATIONS

To ensure operational governance & financial excellence



GUIDING PRINCIPLES

- Functional roles and responsibilities
- Strategic Financial Growth
 - Budget submission process
 - Membership/programming payment offerings
 - Financial institution review
 - Revenue generating strategy
- Strategic operations aligned upgrade with Finance and Technology



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GOVERNANCE & OPERATIONS
To ensure operational governance & financial excellence



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<p>2024 Pre- Work</p>	<p><u>PREWORK MUST BEGIN IN 2024 OR ENTIRE PLAN SHIFTS</u></p> <ul style="list-style-type: none"> • Restructure timeline for board nomination and approval process - President/President-Elect • Restructure budget approval timeline to align with nomination and approval process - Treasurer • Approved 2025 budget before end of year - Treasurer • Restructure board organization and define new roles to support approved strategic plan - President/President-Elect • Create strategic financial growth plan - Treasurer/Executive Board
<p>2025</p>	<p>Implement new Nomination and approval process - Secretary Implement new organization structure - President Embed strategic plan - Secretary</p> <ul style="list-style-type: none"> ◦ Adapt dashboard to support strategic plan ◦ Quarterly check-ins ◦ October goal setting board session ◦ Year end review ◦ Create Master calendar- Secretary ◦ Begin implementation of financial growth plan - Treasurer ◦ Begin Operations upgrade to align with Technology - Operations
<p>2026</p>	<p>Continue financial growth plan implementation - Treasurer Continue overall Operations upgrade - Operations</p>
<p>2027</p>	<p>Review, update, and transition financial growth plan - Treasurer Review, update, and transition overall operations upgrade - Operations</p>

Success Metrics

GOVERNANCE & OPERATIONS

To ensure operational governance & financial excellence



GUIDING PRINCIPLES:

- Functional roles and responsibilities
- Strategic Financial Growth
 - Budget submission process
 - Membership/programming payment offerings
 - Transitioned QuickBooks
 - Financial institution review
 - Revenue generating strategy
- Strategic operations aligned upgrade with Finance and Technology



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Perform I.D.E.A.S audit Q1 2025	Formalize process and procedure for board retreats Q1 2025	Budget submission process and instructions review Q1 2025
Defined KPI's associated with sponsorships Q1/Q2 2025	Board Onboarding Process Q1/Q2 2025	Clear vision across teams Annually
Strategically (visually) showcasing the impact of the chapter Ongoing	Multi-year succession plan and implementation Ongoing	Members and volunteers are delighted Q1 2025 Baseline SWOT analysis & survey Annually
Significant measurable increase in volunteerism Q1 Create Baseline Annually	More value-add time for volunteers and members Q1 Create Baseline Annually	Significant measurable increase in participation in events Q1 Create Baseline Annually
	Define ICF NJ Value Proposition & Purpose Q1 2025	

TECHNOLOGY

To ensure that our technology is meeting the needs of our ICF New Jersey ecosystem



GUIDING PRINCIPLES

- User friendly
- Intelligence to make decisions
- Leading Edge
- Consideration of metrics
- AI



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TECHNOLOGY
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2024
Pre- Work Audit - **President**
RFP Process - **Operations with input from other Directors and Stakeholder. Debrief I.D.E.A.S. w/DEI**

2025 Q1 RFP Decisions - **Technology/Operations**
Q2 Begin Implementation - **Technology/Operations**

2026 Continue Implementation - **Technology/Operations**
Governance - **President/Operations**

2027 Review, update, and transition Implementation – **President/Operations**
Finalize governance - **President/Operations**

Success Metrics

TECHNOLOGY

To ensure that our technology is meeting the needs of our ICF New Jersey ecosystem

GUIDING PRINCIPLES:

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- Intelligence for decision making
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Reduced
complaints/exceptions
only

Periodic pulse check

Members and volunteers
are delighted

Q1 2025 Baseline SWOT
analysis & survey

Annually

More value-add time
for volunteers and
members

**Q1 Create Baseline
Annually**

Significant measurable
increase in
volunteerism

**Q1 Create Baseline
Annually**

Significant measurable
increase in
participation in events

**Q1 Create Baseline
Annually**

INTUITIVE USER EXPERIENCE

ENGAGEMENT

To boost interaction and connectivity, both within and outside the organization

GUIDING PRINCIPLES

Internal:

- At Board Level/Committee leads
- At Member Level
- Building Community

External:

- Strategic Relationships
- Create value for coaches and clients
- Promote awareness of coaching and coaches to prospective clients
- Develop relationships and partnerships to accomplish
- Public Relations- Building Awareness about Coaching
- Building Community



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Engagement - INTERNAL

ENGAGEMENT

To boost interaction and connectivity, both within and outside the organization



GUIDING PRINCIPLES:

Internal

- At Board Level/Committee leads
- At Member Level
- Building Community

2024
Pre- Work

Define volunteer position - **President/President-Elect**
Recruit and onboard by year end - **President/President-Elect**

2025

Increase volunteerism

- a) Recruit strategic connections with expertise and talent to support the board - **President/Board**
- b) Create and begin implementation of plan to increase volunteerism - **Volunteer position**

Offerings-Define strategic and collaborative “must have” offerings that will increase engagement - **Membership/Programming**

- Create board pods - **President/and or Executive Committee**
i.e. Administrative pod - **Operations, Treasurer and Secretary.**
i.e. Communication pod – **Communications, membership, DEI and programing.**

2026

Implement plan to increase volunteerism - **Volunteer position**
Implement strategic and collaborative “must have” offerings that will increase engagement - **Board**

2027

Review, update, and transition Implementation – **President/Operations**



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Success Metrics - INTERNAL

ENGAGEMENT

To boost interaction and connectivity, both within and outside the organization

GUIDING PRINCIPLES:

Internal

- At Board Level/Committee leads
- At Member Level
- Building Community

Members and volunteers are delighted
Q1 2025 Baseline SWOT analysis & survey
Annually

Intuitive user journey
Q4 2025

More value-add time for volunteers and members
Q4 2025

Significant measurable increase in volunteerism
15% Year after year

Create a Strong mindset of collective organizational synergy outward
By Q1 2027

Significant measurable increase in participation in events
15 % Year after year

Implementing Volunteer recognition process
Q4 2025



Engagement - External

2024
Pre- Work All 2025 goals to begin in 2024 - **Strategic Partnerships**

ENGAGEMENT
To boost interaction and connectivity, both within and outside the organization

GUIDING PRINCIPLES:

- External
 - Strategic Relationships
 - Create value for coaches and clients
 - Promote awareness of coaching and coaches to prospective clients
 - Develop relationships and partnerships to accomplish
 - Public Relations- Building Awareness about Coaching
 - Building Community



2025

Develop Partnerships between ICF NJ and Rutgers
 Enhance visibility of what coaches do with major partnering opportunities - **Strategic Partnerships**
 le: speaking at a large NJ conference
 Follow up with major business clients for coaching opportunities - **Strategic Partnerships**
 Create a list of ICF NJ coaches with industry areas expertise for PR and speaking opportunities - **Strategic Partnerships**
 Contact coaching schools to reinforce the value of ICF NJ when receive credentials - **Strategic Partnerships**
 Engage ICF global to support ICF-NJ regarding outreach to coaching schools - **Strategic Partnerships**
 Identify outreach vehicles to promote ICF-NJ coaches, blogs, podcasts, journals etc. - **Strategic Partnerships**
 Create and maintain relationships with other strategic relationship directors locally and globally- **Strategic Partnerships**

2026

Continue implementation - **Strategic Partnerships**
 Choose new and/or refine pilots
 Engage membership in the pilot process

2027

Review, update, and transition Implementation - **Strategic Partnerships**

Success Metrics - EXTERNAL

ENGAGEMENT
To boost interaction and connectivity, both within and outside the organization



GUIDING PRINCIPLES:

External

- Strategic Relationships
 - Create value for coaches and clients
 - Promote awareness of coaching and coaches to prospective clients
 - Develop relationships and partnerships to accomplish
- Public Relations- Building Awareness about Coaching
- Building Community



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Increase the number of relationships and partnerships and identify other success metrics

By year end 2025 create baseline measure

Deliver on goals of greater levels of awareness, education and reasons for wanting to partner with ICFNJ

Q4 2026

Members and volunteers are delighted

Q1 2025 Baseline SWOT analysis & survey

Annually

Build ICF NJ brand awareness

Ongoing

Create a strong mindset of collective organizational synergy outward

Q1 2027

CREDENTIALING

To provide premier guidance and resources to support member credentialing



GUIDING PRINCIPLES:

- Create an ICF Credential awareness Campaign.
- Elevate education about the importance of Competencies and Ethics
- Provide robust CCE Offerings
- Offer ICF Credentialing value presentations.



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2024
Pre- Work

Define role of Credentialing Position -
President/Membership/Programming

Recruit for Credentialing Position and onboard by end of year-
President/Membership/Programming

2025

Q1/Q2 Create credentialing plan - **Credentialing Position**

Q3/Q4 Begin implantation - **Credentialing Position**

- Create an ICF Credential awareness Campaign.
- Elevate education about the importance of Competencies and Ethics
- Provide robust CCE Offerings
- Offer ICF Credentialing value presentations.

2026

Continue implementation - **Credentialing Position**

- Elevate education about the importance of Competencies and Ethics
- Provide robust CCE Offerings
- Offer ICF Credentialing value presentations.

2027

Review, update, and transition Implementation - **Credentialing Position**

Success Metrics

CREDENTIALING

To provide premier guidance and resources to support member credentialing



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Increased new members

**Q1 2025 Baseline
Annually**

Increased retention

**Q3/Q4 Baseline
Annually**

Increased volunteerism

**Q3/Q4 Baseline
Annually**

Increased participation in all things ICF-NJ

**Q1 Baseline
Annually**

More strategic partnerships

**Q1 2025 Baseline
Annually**

Increased awareness of coaching and the organization in NJ

**Q1 2025 Baseline
Annually**

Members and volunteers are delighted

**Q1 2025 Baseline SWOT
analysis & survey**

Annually

Increased conversion to credentialed members

**Q3 2025 Baseline
Annually**

**Transition Plan-To be completed once
board approves
2025 - 2027 Strategic Plan**



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THE END



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APPENDIX



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GOVERNANCE & OPERATIONS

To ensure operational governance & financial excellence

PAIN POINTS:

- Term limits on Presidents and other roles
- Creation of governance for community groups and others
- Onboarding and transition plan for board
- Proper succession Plan
- Getting people to serve
- Scope of roles of Executive Committee/General Board
- Alignment of vision across teams
- Plan and execute “The Story”- of the vision of the chapter for the year
- Document management-ease and efficiencies
- Is the governance audit captured- what is included?
- How to communicate business operations so that they rise to the top and not get lost
- Finances
- How do we grow the money we have?
- Investments
 - Revenue generating ideating/Budget review.
 - Sponsorships
 - Where do we get the biggest bang for our buck?
- Create a clear/consistent budgeting process/template/spending best practice.



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TECHNOLOGY

To ensure that our technology is meeting the needs of our ICF-NJ ecosystem

PAIN POINTS:

- Website has to be a user experience
- New member tab
- Resources – table of contents
- Easily finding things
- Check out
- Better linkage with global when joining the chapter
- Seamless global/chapter experience
- Intuitive navigation
- Curation Calendar
- Master Calendar □ Quick links
- Push notifications and automations
- Expiring
- Membership Renewal – 1 Year
- Credential Renewal – 3 Year
- Easier way to manage membership data
- Member portal – cce's
- Click through when you are registering for a class
- Payment systems
- Back office
- Communication
- Site Map
- Member portal



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ENGAGEMENT

To boost interaction and connectivity, both within and outside the organization

PAIN POINTS:

INTERNAL:

Board and/or Committee Level:

- Interoperability – We have the capability to speak to one another.
- Board level – Defining roles and responsibilities (much earlier)
- Audit and preplan.
- Handoff between President and President Elect
- Onboarding for both Board and committees
- Continuity and sustainability
- Lack of volunteerism
- Discount/exchange value for time investment for volunteers
- Lack of a marketing and technology roles on the board
- Global payment vs local payment

Member Level:

- Membership value for earning credentials.
- New Member 1-3 years' experience
- Mid-level members 3-5 years' experience
- Seasoned members 5+ years' experience
- Credentialed members
- Seasoned Professional Transitioners
- Expansion of offerings – What defines us???
- What part of the market do we own?
- Interoperability – We can speak to one another.
- Lack of survey metric



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CREDENTIALING

To provide premier guidance and resources to support member credentialing

PAIN POINTS:

- Attendance at our CCE's.
- Variety of time offerings – Night/Day/Morning.
- Clarity on the process and what's needed membership and credential renewal.
- More awareness and support (partnering with global)?
- Frequent questions answered document.
- Board position for credentials? Dedicated resource
- Make it easier to raise awareness.
- Getting the hours to become credentialed.
- Technology to support capturing CCE's – ICFNJ & Global
- Unknown of Capturing new member intent on credential focus
- Membership protocols are not working.
- Value proposition of ICFNJ CCE offering – Why ICFNJ?
- Financial model



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KATHLEEN'S NOTES

❖

A Pillar Approach Tied to Global Plan

**These notes were shared in
December 2023*

2025

- Campaign: video submissions: In the past 12 months – what has ICF NJ achieved that brings you a sense of pride?
- Conference (August – October time frame) Relationships & Partnerships, Business Development theme – Humanness – Engage Global
- Focus on building Partnerships that work (ICF schools, other organizations i.e. ATD; SHRM, Local chambers) (New Board Position)
- Strong emphasis on member awareness and involvement – earn CCE's, build partnerships and friendships, drive business awareness.
- Emphasis: Retention of members & Credentialing
- Member recognition – rewards program
- Initiate Ignite and Pro bono community groups
- Coaches Giving (November)
- Town halls: quarterly – Meet the president's.
- Uniting Community Groups: Business Acceleration, Personal & Life, Executive Leadership, DEI, Applying Neuroscience
- Highlighting and Building Thought Leadership
- Participate in ICW (all years)
- Past President's Council

2026

- Focus on a one day focus each quarter for Investment in You programming – begin in January with a planning focus, (Jan-Feb-March) April (April, May, June) September (July, Aug, Sept) November (October, November, December)
- Member engagement survey of some type

2027

Plan a conference.

IMPORTANT LINKS



Member Survey

<https://www.dropbox.com/scl/fi/p5sy86qs1n4dy11t3iol/Member-Survey-Results-4-27-23.pdf?rlkey=0gahhowa0uzcq7r0qnhucfqg7&st=rrf26oq9&dl=0>

Previous Strategic Plan

<https://www.dropbox.com/home/ICF%20New%20Jersey%202023/ICF%20NJ%20Strategic%20Plan?preview=ICF+NJ+Strategic+Plan+Presentation+TH.pdf>

Activity Plan

<https://www.dropbox.com/scl/fi/r6f22bqhe9hc016rys3wr/2023-ICF-NJ-Chapter-Activity-Report-Final-Submission.pdf?rlkey=yxvi230srcnuoi7drfxq6guu1&st=8lo7aftw&dl=0>



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