

# IAC Vision and Strategic Plan: 2010 – 2015

(Adopted by the IAC Board of Governors, May/June 2010)

## Outline of this document

- A) Where we're headed – Vision, Mission, Values, Aims, Service Areas
- B) The future of coaching
- C) Our distinct value to the profession
- D) Where we are now – Early development, SWOT
- E) Desired outcomes for 2015
- F) Design strategies to meet these outcomes
- G) Next steps
- H) Appendix: The 2009-10 strategic visioning and planning process
- I) Appendix: Visioning process feedback from the IAC member community

### **A) Where we're headed ...**

**The IAC slogan:** Expanding the Path to Coaching Mastery

The IAC en**VISIONS** a world where:

- Coaching professionals commit to continuously learning, growing, collaborating and holding themselves accountable;
- Coaching recipients are inspired to achieve their desired outcomes; and
- The world benefits in many surprising, life-giving ways.

The IAC is on a **MISSION** to provide a highly accountable learning/certification framework for aspiring and experienced coaches, so their mastery of coaching is valued and contributes to evolving human potential worldwide.

IAC embodies the following **VALUES**:

- Lifelong learning
- Innovation and change
- Diversity and inclusiveness
- Partnership and caring
- Openness and transparency
- Abundance thinking and trust
- Sustainability and responsibility
- Inner peace and centering
- Integrity and high ethical standards

The IAC aims to:

- **Stand** for the continuous development and practice of coaching excellence worldwide.
- **Step up** to its unique position as a premier global standard for coaching mastery in practice, with a focus on experienced coaches.
- **Be** an inspirational magnet for governments, organizations, clients, and coaches who want to learn about coaching mastery in practice.

We do this through:

- **Adhering to a professional code of ethics.**
- **Certification** for experienced coaches who would like to be recognized for their mastery, regardless of the path(s) they followed to achieve it; **support** toward mastery and certification for newer coaches.
- **Learning agreements** to help certified coaches stay fresh and accountable, pathways to support newer coaches, and opportunities to lead and contribute to the development of coaching excellence worldwide.
- **Collaboration** with other coaching bodies and professions to clarify standards in the marketplace and to become part of the solution for clients, schools and researchers.
- **Connection** through growth of peer networks, exchange coaching, online communities and resources, linking clients with coaches.
- **Building IAC's organizational capacity** in a way that supports this vision, is in line with our values, and serves the coaching community in a professional manner.

## **B) The future of coaching**

The 2009 visioning process led to the following articulation of the global environment which the IAC will be co-creating.

### **Coaching is:**

- A powerful, co-creative process that, when masterfully facilitated, enables coaching recipients to both efficiently achieve their desired results, and to grow as human beings.
- A process learned and practiced by people from all walks of life, within their diverse professional and community environments.
- Widely respected, available and affordable through workplace, professional and community networks.
- A well-accepted, recognized, and necessary intervention in organizational growth and development.
- An approach that is complimentary to many disciplines and professions, and as such is a required module of the curricula for those disciplines. Examples include: financial planning, management, organizational development, social work, primary and secondary education, community development, health education ... and so on. The coach approach may be called something else within these disciplines.
- A powerful, viral process that can create a paradigm shift toward collaborative and proactive ways of working among humans in a wide variety of public and private fora.

### **Coaches:**

- Embody life-long learning of coaching mastery.
- Are unswervingly focused on supporting coaching recipients to achieve their desired results.
- Must come from an attitude of profound respect for humanity – their own and others'.
- Master their craft through continuing education, practice and peer review.
- Walk their talk – model proactive problem-solving, resourcefulness and accountability to commitments.

- Are fully aware of and respond appropriately to the contextual needs of coaching recipients, often basing this on extensive knowledge of and expertise with their target client groups.
- Can demonstrate the value they add to coaching recipients and are compensated accordingly.
- May practice coaching as a sole service, as part of a larger set of services, or as an employee inside an organization. In doing so, they meet their own financial goals.

**Coaching clients and/or recipients:**

- Value and actively seek coaching when they want to learn, grow, and achieve desired results.
- Achieve more of what they want as a result of receiving coaching.
- Continuously develop and evolve as human beings as they sustainably increase their capabilities to achieve their desires.
- Can access high quality coaching that meets their needs and is in their price range.
- Have increasingly high expectations regarding the quality and methods of coaching service.
- Access coaching in-person through their workplace, as part of training/education/community service programs, and by private arrangement.
- Also access coaching via content on the web, group teleconferenced programs, individual telephone coaching, membership websites, webinars, Twitter feeds, and other emerging technologies.
- Are found globally and in all demographics, including: government leaders and their constituents, school administrators/teachers and their students, employers and employees, health practitioners and patients, international aid agencies and aid recipients, retirees, parents, young adults, teenagers, children ... etc.
- Increasingly hold their coaches and one another accountable for proactive problem-solving and leadership in response to global and local issues of the day.

**Coaching profession partners include:**

- Other certifying bodies
- Professional societies and organizations
- Governments
- Universities and coaching schools

**C) The IAC's distinct value to the profession**

The IAC:

- Holds a premier standard for coaching excellence.
- Recognizes coaching mastery and the variety of paths that coaches have taken to achieve it.
- Provides a self-initiated learning agreement approach to ongoing accountability for maintaining high standards of coaching mastery.
- Is viewed as a visionary and proactive leader in the development of coaching worldwide.

- Is an attractive vehicle for highly qualified and mature individuals to serve the community and forward their aspirations for coaching:
  - Attracts innovators, trailblazers, and pioneers;
  - Stands for both innovation and mastery in coaching;
  - Board members and volunteers are motivated to advance coaching in the world for the benefit of all.
- Reaches and supports users of coaching in different environments, across global cultures.
- Is managed by experienced coaches, with diverse backgrounds.
- Has the capacity to serve 10,000+ members in multiple languages

We honor and nourish our roots; we expand on growing bodies of knowledge and experience that have relevance for the coaching profession; we support diverse branches of the coaching professional community.

#### **D) Where we are now ...**

Since its inception, the IAC has been slowly building capacity to provide the world with a high quality certification of coaching mastery. Many highly qualified volunteers have worked hard to develop and improve both our products, and our systems. Examples include:

- The IAC Coaching Masteries®
- The IAC Coaching Masteries® E-book
- Translations of the Masteries®
- The Coaching Masteries® Licensee Program
- The IAC website
- The Voice
- Certifier training and support
- Volunteer coordination and support
- Chapter coordination and support
- Policies and procedures related to the growing organization

#### **Current strengths**

Among other things, we have:

- We have a product people want – independent certification of coaching mastery based on demonstrated competency;
- The IAC Coaching Masteries® e-book, in English, Spanish, Chinese, and French;
- Independent certifiers
- Training for certifiers
- Low comparative cost
- Our process is both flexible and inclusive, allowing us to reach out to coaching practitioners from diverse backgrounds, without compromising our endorsement of masterful coaching.
- Simple licensing program allowing coaching schools and mentors to support coaches in achieving IAC Certification.
- Our leadership is open to innovation, is inclusive, and ready to adopt bold strategies.
- We are purpose driven and value based organization.

### **Current weaknesses**

Key challenges facing us currently include:

- The IAC brand is not fully developed nor well communicated. This is impacting on our ability to acquire and retain members, and therefore it has a direct negative impact on our budget. It is also impacting on our ability to respond quickly to current feedback from the coaching community with a strong, confident, and consistent message of what we have to offer. We don't have a marketing strategy.
- Organizational systems need to be developed and/or upgraded to support us into the future. These include: policy and procedure development, use of appropriate technologies, volunteer recruitment, assignment, development and retention, chapter support mechanisms, new member orientation, new board member orientation, accounting and finance systems.
- Our human capacity to reach IAC desired outcomes is stretched. Management of the organization is done by volunteers, many of whom must fit IAC work in with other, higher priorities. This can result in the delay of important work.
- Our current budget is limited, and therefore we have little capacity to launch a full scale marketing campaign
- Our membership is low and member turnover is high.
- Compared to other coaching bodies, the IAC is underdeveloped.

### **Current opportunities**

The opportunities facing the IAC at this time are almost breathtaking. They include:

- Results of the strategic visioning process with Dave Ellis have reinforced the IAC's role and vision.
- The current debate within the ICF community regarding their move toward ISO alignment has raised awareness that there is a need for an alternative model – and the IAC-CC *is* an answer to many of the concerns being raised. It's just that not enough coaches know about what the IAC offers.
- The ICF leadership is becoming more open to the perspective that it may make sense to work with the IAC into the future.
- The IIC is a global certifying body, growing out of Europe, with over 3000 members. They have expressed an interest in a collaborative arrangement.
- There is a need for a coordinated and coherent framework for coach certification world-wide. The IAC could play a role in creating this framework partnering with numerous other certifying agencies, schools and government regulators world-wide.
- Any work that needs to be done to (re)brand this certification can easily include provisions to address the concerns/transition process of our current IAC CCs.
- We are in the process of redeveloping our website, which means we can create and implement a branding strategy fairly quickly.
- With rapid development of research in coaching, there's an opportunity to create stronger evidence for the validity of our standards and certification system.
- Our access to a wide variety of recordings of coaching through our certification process makes us an attractive partner for researchers.

### **Current threats**

Among other things, current threats include ...

- The economy has the potential to continue impacting negatively on membership, volunteerism, and certifications.

- Without sufficient capital to implement a comprehensive marketing strategy, we are not likely to grow the organization sufficiently to make it viable and sustainable.
- Relying exclusively on volunteers threatens our ability to respond quickly, consistently, knowledgeably, and professionally to the demands of the type of members we hope to attract.
- We currently risk overwhelming and misusing volunteers, which can lead to volunteer attrition.
- Without a coordinated and coherent framework for coach certification world-wide, many different players are stepping in to fill the gap – including government regulators.
- Without a credible framework for coach certification world-wide, the profession itself is at risk of becoming a discredited fad. Coach professionals are already rebranding themselves under different labels (i.e. productivity partner)

What is truly striking and exhilarating about the above assessment is that the IAC's strengths match its current opportunities and can address some of the threats very well. It remains the job of future IAC leadership to build on these strengths and to be resourceful and strategic in building systems and capacity so we may rise to take advantage of the opportunities that face us.

### **Key issues to address**

Based on the SWOT Analysis, the key areas to address in the strategic plan will be:

1. Definition and development of the IAC brand of certification as a self-initiated Learning Agreement.
2. Organizational capacity to both expand services and to respond to exponentially growing demand for certification and member services
3. Development, support and promotion of the Masteries<sup>®</sup>.
4. Collaboration with other coach profession stakeholders.

### **E) Desired Outcomes**

By or before December 2015, the IAC aims to create the following reality:

1. IAC members enter into self-initiated learning agreements to achieve and retain the IAC-CC, and are connected with resources and environments to facilitate their journey with the Masteries<sup>®</sup>.
2. IAC licensees enter into self-initiated learning agreements to design and commit to high quality use of the Masteries<sup>®</sup>.
3. The IAC understanding and practice of coach certification as a self-initiated Learning Agreement is respected globally for the professional mastery it generates and supports.
4. The IAC Coaching Masteries<sup>®</sup> are accepted as a premier standard for coaching excellence, both within the coaching profession and by other bodies and professions seeking to add coaching to their repertoire of services.
  - a. Other coach certifying agencies provide explanations on their websites of how they fit with IAC certification and also provide links to the IAC website.
  - b. Professional organizations for HR, law, accounting, management, consulting, teachers, etc. provide links on their websites to the IAC website.
  - c. Governments that are involved in regulating the coaching profession use the IAC Masteries in developing their standards.

- d. Tertiary education providers are licensees of the IAC Masteries®.
- e. Independent research has validated the IAC Masteries® and certification systems.
- 5. The IAC has developed several pathways to facilitate the growth of coaching practice in non-coaching professions.
- 6. The IAC has 5,000+ paying members, with a 70% annual renewal rate.
- 7. There are 500+ IAC-CCs.
- 8. The IAC is truly serving the international coaching community, as demonstrated by its active membership, provision of certifications in four languages, active local chapters and cross cultural research publications.
- 9. The IAC has expanded its human, technical and financial resources to support the above.

## **F) Design Strategies**

From where we stand in March of 2010, there are two key areas that require immediate development to ensure that the IAC survives and thrives.

### **1. Building organizational capacity**

- a. Support learning the Masteries® as the core business of the IAC
  - i. Expand certifier pool
  - ii. Expand certifier training into multiple languages
  - iii. Build organizational structure to support core business
    - 1. Consider regional representation
- b. Hire staff for key (mission critical) positions
  - i. Full-time executive
  - ii. Full-time, IT savvy, customer service virtual assistant
  - iii. Full-time IT, Marketing, Member Services coordinators
  - iv. Seek sponsorship for the first 2-3 years
- c. Marketing and collaboration budget
  - i. Develop and maintain website, social networking sites, representation at conferences, etc.
  - ii. Develop collaborative relationships with other coaching and professional bodies (may include reciprocal agreements)
  - iii. Seek sponsorship for the first 2-3 years
- d. Develop HR and IT systems to recruit and support staff and volunteers - in support of a virtual organization.
- e. Continue organizational development activities to professionalize and grow the agency

### **2. Development, support and promotion of the Masteries®**

- a. Commit to our certification structure
  - i. Establish a self-initiated learning-agreement approach for achieving and maintaining coach certification. This approach would require IAC members interested in certification to annually submit a statement of intent regarding how they plan to:
    - 1. Observe the ethical standards of the IAC
    - 2. Become an IAC Practitioner
    - 3. Become an IAC Certified Coach

4. Retain their IAC Certified Coach designation. For recertification purposes, IAC Certified Coaches would meet periodically, but no less than every five years, with an IAC certifier to review their annual statements and to share and process their continued experience with and use of the IAC Coaching Masteries®.
  - ii. Existing IAC-CC for experienced coaches – benefits include:
    1. Global standard for coaching mastery, with unique mechanisms to value lifelong learning and maintenance of high standards
    2. Access to resources and environments that support lifelong learning of coaching mastery, including peer and exchange coaching opportunities within the IAC community
    3. Support for accessing and conducting coaching research
    4. Collaboration with peers
    5. Opportunities to contribute to the development of coaching excellence worldwide
  - iii. New IAC Practitioner designation, given to those who agree to the code of ethics and system of arbitration, and who pass the written exam – benefits include:
    1. Support to achieve mastery
      - a. Self-initiated learning agreements to achieve the IAC-CC
      - b. Access to peer and master coach networks
      - c. Other feedback mechanisms
      - d. Discounts on member benefits (training, insurance, etc.)
    2. Flexible and direct path toward mastery
  - iv. Possible new certification in the long term for managers, and/or teachers
  - v. Masteries® continuous upgrade/renewal/feedback
- b. Develop membership services
- i. Create an attractive, empowering Continuing Development Program, linked to certification pathways, new research, etc.
    1. Affordable and accessible feedback mechanisms, including but not limited to:
      - a. Learning-agreement consultations
      - b. Coaching triads and practice groups
      - c. 360 reviews
      - d. Peer reviews and/or supervision groups
      - e. Anonymous/self monitoring
    2. Based on choice, trust and self-responsibility for learning
    3. Available to all members, not just IAC-CCs
    4. Cross-pollinating IAC-CCs with newer coaches, licensees, and other professions to focus on expanding human potential.
    5. Leadership opportunities (Chapter hosts, exchange coaching, Masteries review, Certifier training, etc.)
  - ii. Expand attractive member benefits
    1. ReciproCoach concept
    2. Worldwide professional indemnity insurance

3. Increased opportunities for member interaction through local and virtual chapters
  - iii. Develop new member orientation/induction
  - iv. Coordinate chapter services – international, regional, local, virtual
- c. Actively promote and position the benefits of IAC Masteries®
- i. Clarify the IAC brand – Reflect this on the website and other promotional outlets
    1. Unique approach and values (inclusiveness, innovation, learning, diversity, collaboration)
    2. High value for money
    3. Unique quality and global reach of coaching peers
    4. A premier global body for certification of coaching mastery
  - ii. Position the IAC vis-à-vis other certifying bodies.
  - iii. Promote the IAC Masteries® as a certification of choice to coaching organizations, schools, universities and professions.
  - iv. Collaborate with other coaching bodies to develop reciprocal relationships
  - v. Promote the Masteries® licensing program to coaching organizations, schools, universities, and others
- d. Strengthen the Masteries® licensing program
- i. Require that our licensees give us a written statement of intent regarding how they plan to use the Masteries®.
  - ii. Require that our licensees take part in an orientation program, plus an annual check-in regarding their experience of using the Masteries® in coach training and mentoring. The orientation program will help them understand more fully our requirements for using the Masteries® and any best practices we suggest. The annual check-in will give them an opportunity to share their celebrations and concerns with other licensees.
  - iii. Require that our licensees provide some kind of post-exam contact to help people celebrate, reflect on, and process their learning from passing the exam or recover emotionally, reflect on, and process their learning from not passing the exam.
- e. Strengthen the Masteries® through research
- i. Collaborate with researchers by offering access to practicing coaches (while respecting privacy and confidentiality).
  - ii. Use research to improve and/or support the Masteries®
  - iii. Use research to improve and/or support the certification process.
  - iv. Expand ways to assess the impact and experience of coaching so as to help coaches improve their use of the Masteries®.

## **G. Next steps**

1. Develop a detailed business plan and fundraising proposal to seek a 3-year endowment for full-time paid staff. To include: Lead Certifier, IT manager/social media wiz, Marketing/collaborations manager; Customer service VA (virtual assistant); Executive Director.
2. Develop an operational plan to expand the capacity of certification board. To include: more training, new languages, and a bigger pool of certifiers.
3. Develop HR/IT systems to recruit and support staff and volunteers.

4. With new executive and coordinators, develop a detailed operational plan to guide progress toward the above goals and strategies.
5. Conduct a full rollout of the strategic plan, and develop mechanisms to guide existing volunteers, including the Board, to ensure their activities are in line with the IAC vision and strategic plan.
6. Promote the IAC Masteries<sup>®</sup> as a premier certification of choice to coaching organizations, schools, universities and professions.
7. Continue to include all participants in IAC plans/visions/dreams and strategic actions.
  - a. Expand input beyond our Board of Governors