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Organizing a Chapter

Thank you for your interest in organizing an ICF Chapter. The global ICF community is currently made up of 120-plus Chapters in more than 60 countries. Each Chapter is led by a team of volunteer leaders.

Chapters offer a direct connection between members and ICF, as well as a source for networking and professional development.

ICF Chapters have the support of ICF Global. ICF helps its Chapters in four main ways:

1) **Access to leaders-only resources and information.** All ICF Chapter Leaders (Board Members) have access to the [Chapter Leader Resource Library](#). This is the source for materials and resources that assist in Chapter leadership. All Chapters are encouraged to share items for inclusion in the library. Chapter Leaders have the ability to pull their Chapter membership lists directly from their [membership profiles](#) at Coachfederation.org. This is a simple way to see who has affiliated with their Chapter through Coachfederation.org. And all Chapter Leaders receive a monthly Chapter Leader Update email from ICF Headquarters. This update is a digest of resources and news for Chapter Leaders and is sent the first Monday of each month.

2) **Authorization to use the ICF brand.** As the world’s largest community of professionally trained coaches, ICF is recognized globally as the most credible professional coaching organization. ICF Chapters are able to leverage this credibility by using an ICF Chapter logo, launching a Chapter website and social media platforms that align with the ICF brand, and displaying ICF-branded materials designed by ICF Global. ICF Chapters may also apply for the Continuing Coach Education designation for events, free of charge.

3) **Connections with other Chapters.** All Chapters are encouraged to participate in the regional conversation. By connecting with other Chapters in your region, you find additional means of support. More information around Regional Advisory Councils is included later in this document. Chapter Leaders are also encouraged to connect with other Chapters around the globe.

4) **Financial support.** ICF offers Chapter Rebates to ICF Charter Chapters and financial support to non-Charter Chapters through the Chapter Development Funding Initiative. More information around both of these means of financial support is included later in this document. Also, ICF offers financial marketing support on an annual basis (April 1 – March 31). Financial support may also be available for other individual projects. Contact your Regional Development Advocate to learn more.
General Guidelines

The International Coach Federation encourages and supports the formation of ICF Chapters in geographic areas where there is a group of ICF Members who want to meet regularly to receive education and network with other colleagues in their field.

To begin the formation of an ICF Chapter, there must be at least 20 current ICF Members in a geographic area. To file for ICF Charter Chapter status, there must be a minimum of 50 current ICF Members.

Every ICF Chapter agrees to:

• Subscribe to ICF's vision, mission and values, and strategic plan.
• Adhere to the policies and standards of ICF.
• Develop, manage and maintain itself as a chapter of ICF within its geographic area, in such manner and subject to the requirements and limitations set forth by ICF Chapter requirements and Chapter Leader guidelines.
• Participate in the activities, programs and business of ICF.
• Support ICF by keeping historical records and data.
• Engage in education on the local level, building local and regional alliances and seeking sponsorships within the parameters developed and provided by ICF.
• Organize a minimum of six (6) education activities that carry Continuing Coach Education units per calendar year.
• Communicate directly to ICF Members in the geographic area in which the Chapter is authorized to operate.
• Provide networking opportunities for the Chapter's members and establish the Chapter as a local source of information, expertise and resources.
• Develop and maintain a current and relevant website designed according to the ICF Brand Identity Manual.
• Participate in your local ICF Regional Advisory Council.
• Maintain a paid and approved membership of at least twenty (20) ICF Members (for Chapters) or at least fifty (50) ICF Members (for Charter Chapters) at all times or a number determined by the ICF Board of Directors from time to time.
• Recruit members for ICF and the Chapter within the geographic area in which the Chapter is authorized to operate.
• Engage in regular conversation with the appropriate Regional Development Advocate.
• Promote the ICF Credentialing process and other ICF Global programs.
• Submit reasonably detailed annual Chapter activity reports and financial reports to ICF, along with any supporting documentation requested by ICF.
• Maintain a qualified board of directors who shall be current ICF Members and retain their ICF Membership throughout their term.
• Maintain insurance coverage required by applicable law or such greater amounts as is necessary and prudent for the Chapter's operation.
• Be in ICF brand alignment according to the ICF Brand Identity Manual.
• Satisfy all other requirements as established by ICF and set forth in agreements entered into between ICF and the Chapter.
ICF Chapter Requirements

In geographic areas that have a minimum of 20 ICF Members, an ICF Chapter may be formed. Once the group is established, the group should hold organizational meetings to:

• Elect a Chapter President, Vice President, Secretary and Treasurer (the positions of Secretary and Treasurer may be combined). The roster of officers shall be submitted to ICF for approval.
• Create a Chapter name that meets ICF requirements outlined in the Chapter Agreement. *(separate document)*
• Develop Chapter bylaws. *(separate document)*
• Have a minimum of 20 ICF Members in good standing listed on the Chapter Resolution Form (see page 11).
• Submit all required documentation as outlined on the Checklist for Chapter Status Submissions (see page 9) to your Regional Development Advocate.
ICF Charter Chapter Requirements

An ICF Charter Chapter must maintain a paid and approved membership of at least fifty (50) ICF Members at all times or a number determined by the ICF Board of Directors from time to time. Fifty (50) ICF Members in good standing must sign the Chapter Resolution Form. Once the group is established, the group should hold organizational meetings to:

- Elect a Chapter President, Vice President, Secretary and Treasurer (the positions of Secretary and Treasurer may be combined). The roster of officers shall be submitted to ICF for approval.
- Create a Chapter name that meets ICF requirements outlined in the Charter Chapter Agreement. *(separate document)*
- Develop Chapter bylaws. *(separate document)*
- Have a minimum of 50 ICF Members in good standing listed on the Chapter Resolution Form.
- Incorporate the Chapter to protect its officers, directors and members from personal liability for Chapter activities and to, at all times, maintain the Chapter’s corporate status in good standing. (This requirement may vary from country to country.)
- File appropriate forms in compliance with local and national government to obtain and maintain tax-exempt status or be recognized as a not-for-profit professional organization. ICF Charter Chapters must at all times maintain tax-exempt or not-for-profit status in accordance with applicable local and/or national law.
- Obtain insurance coverage required by applicable law or such greater amounts as is necessary and prudent for the Chapter’s operation. ICF Charter Chapters must maintain appropriate coverage as required by applicable law at all times.
- Submit all required documentation as outlined on the Checklist for Chapter Status Submissions (see page 9) to your Regional Development Advocate.
- Upon approval, the Charter Chapter president will receive from ICF Headquarters an official Charter of Formation signed by the ICF Executive Director/CEO.
Expectations

Branding
ICF Chapters are expected to maintain compliance with the *ICF Brand Identity Manual*.

Chapter Territory
Potential ICF Chapters are encouraged to look beyond their immediate localities for Chapter creation. For example, ICF Gulf Coast includes members who reside in Alabama, Louisiana, Mississippi and the panhandle of Florida.

Chapters that encompass large geographic areas (such as a country, state, province, etc.) often choose to create satellite groups or branches that meet regularly in different parts of the country, state, province, etc. The purpose of these groups is to provide value to all members of the Chapter, no matter where they are located. How the Chapter chooses to create and manage these groups is completely up to the Chapter.

Continuing Coach Education
Chapters are required to organize at least six (6) education activities carrying Continuing Coach Education (CCE) units per calendar year.

Chapters may award CCE units in Resource Development (RD) without permission from ICF Global and can do so by creating a Chapter certificate template that lists the session title, presenter, date and number of RD CCE units.

To award CCE units in Core Competencies (CC), Chapters must submit an online CCE application to ICF. Applications must be sent at least two (2) weeks in advance of the event.

Fees and Finances
After a Board of Directors is selected, its members are responsible for reviewing ICF's Recommended Financial Best Practices (*separate document*) and developing a financial management plan for the Chapter.

All ICF Chapters may collect activity fees, meeting fees, website fees, networking fees, fees to pay speakers’ and presenters’ honorariums, and other fees needed to support the operation of the ICF Chapter.

Rebate Process for ICF Charter Chapters
ICF Charter Chapters are eligible to receive financial rebates from ICF Headquarters. To promote ICF Membership and programs locally, each ICF Charter Chapter will receive a rebate of $31.36 USD per renewing ICF Member. (Find specific eligibility requirements for renewing members at Coachfederation.org/mer.) ICF also issues a rebate for each new ICF Member to affiliate with the Chapter; these rebates are prorated based on the month the member joined ICF. (Find specific eligibility requirements for new members at Coachfederation.org/mer.) Rebates are made quarterly to ICF Charter Chapters and will be made directly via wire transfer to the Chapters’ bank accounts or to the treasurer.

The procedure for processing rebates is as follows:

1) Every ICF Member has the option to select the ICF Chapter with which he or she would like to be affiliated. This decision is made when initiating or renewing membership; a change in ICF Chapter affiliation can
be made using the “Manage My Account” feature on Coachfederation.org. Rebates will only be issued for members who have chosen Chapter affiliation and paid their dues before the end of each quarter.

2) Rebates will be calculated at ICF Headquarters and confirmed via email to the Chapter.

As part of the Charter Chapter rebate process, ICF will confirm compliance. Please note that rebates will not be processed for any ICF Charter Chapter that is out of compliance.

**Chapter Development Funding Initiative**

Under the Chapter Development Funding Initiative, complying non-Charter Chapters are eligible to receive development funds. These funds will allow ICF Chapters to receive financial support for marketing efforts, website updates and other development activities determined by Chapters to enable their growth and transition to ICF Charter Chapters.

Chapters will be enrolled for a period of three years from the date that they fulfill all participation criteria (enrollment is not automatic). Funds will be disbursed quarterly based on the number of members who join and renew in that period.

To be eligible for funding, an ICF Chapter will first need to complete several important steps in the journey toward Charter Chapter status:

- Establish itself as a legal entity according to local governmental regulations in order to protect officers, directors and members from personal liability for Chapter activities.
- Open a bank account in the Chapter’s name (funds will not be disbursed to an individual Chapter Leader).
- Commit to submit reasonably detailed annual activity reports and financial reports to ICF, along with any requested documentation.
- Enroll in Program.

**Membership**

Chapter membership and qualifications for admission are established by the Chapter Membership Eligibility Requirements (CMER) policy and in accordance with the provisions of the Chapter bylaws, and applicable procedures established by the ICF Global Board of Directors. These may be subject to change with written notice by ICF from time to time.

Under CMER, all ICF Chapter Members are expected to also be ICF Global Members in good standing.

Only Chapter Members will be eligible to hold leadership positions (Board positions, Committee Chair positions), have the ability to vote in the Chapter, and/or represent themselves in any way through the use of Chapter logos or verbiage. ICF Chapters are encouraged to offer exclusive member-only benefits (e.g., exclusive professional development offerings, preferential pricing at Chapter events and access to members-only content).

Chapters are encouraged to offer limited engagement for those who are not eligible for ICF Membership or choose not to hold ICF Global Membership. We ask that Chapters avoid using the term **Member** for anyone who is not a full ICF Member. Instead, the Chapter can choose to call this population **Affiliate, Professional, Colleague, Guest**, etc.

**Regional Advisory Councils**

ICF Chapters are expected to participate in their Regional Advisory Council. The regional conversation is crucial in identifying opportunities to collaborate. Contact your **Regional Development Advocate** for more information on the Regional Advisory Council in your area.
Social Media

ICF Chapters are encouraged to have a presence on social media (specifically, Facebook, Twitter and LinkedIn) and encourage members to join these networks to connect with their Chapter, as well as with ICF Global.

Social media strategy tips can be found in the **Chapter Leader Social Media Guide. (separate document)**

Social media branding guidelines are outlined in the **ICF Brand Identity Manual. (separate document)**

A weekly Twitter Ambassador message is sent to Chapter Leaders every Monday via email. This message contains pre-written social media content that can be used on the Chapter’s Twitter account.
Checklist for Chapter Status Submission

Send to: International Coach Federation, 2365 Harrodsburg Rd, Suite A325, Lexington, KY 40504. Attn: ICF Chapters

Chapter Name: ____________________________

Submitted by: ____________________________  Position: ____________________________

Chapter Status:  ☐ Chapter  ☐ Charter Chapter

Chapter Fiscal Year from __________ to __________

EIN (Employer Identification Number) (if applicable): ____________________________

Documentation Included:

☐ Chapter or Charter Chapter Agreement (all Chapters and Charter Chapters; separate document)

☐ List of Elected Board of Directors (all Chapters and Charter Chapters; at a minimum, President, Vice President and Secretary/Treasurer must be listed on this form)

☐ Bylaws (all Chapters and Charter Chapters; separate document)

☐ Chapter Resolution with at least 20 (or 50, in the case of a Charter Chapter) names/membership numbers of members in good standing (all Chapters and Charter Chapters; see page 11)

☐ Non-Profit or Tax-exempt Status Forms (all Charter Chapters; based on applicable local and/or national laws)

☐ First page of incorporation document (all Charter Chapters)

☐ Copy of declaration page of insurance policy (all Charter Chapters; if applicable)

Chapter Contact Information:  Chapter President Contact Information:

Name: ____________________________  Name: ____________________________

Address: ____________________________  Address: ____________________________

City, State, Zip: ____________________________  City, State, Zip: ____________________________

Telephone: ____________________________  Telephone: ____________________________

Email: ____________________________  Email: ____________________________
### Elected Officers and Board Members:

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**Person to Receive Chapter Rebate Checks (Treasurer):**

Name: 
Address: 
City, St, Zip: 
Telephone: 
Email: 

Wire transfer information for Chapters outside of the United States. (The fee for wire transfers will be taken out of the rebate total.)

This money will be deposited to:

Name of bank: 
Address of bank: 
Bank account number: 
Bank ABA routing number (if U.S. bank): 
Bank SWIFT number (if not a U.S. bank): 
Bank IBAN number: 

If the bank has a correspondent U.S. bank that they prefer to use for this transaction, please provide the following information.

Name of bank: 
Address of bank: 
Bank account number: 
Bank ABA routing number: 
Bank SWIFT number (if not a U.S. bank): 
Bank IBAN number: 

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**ICF OFFICE USE ONLY.**

Date Recorded: 
Processed by:
# Chapter Resolution Form

A minimum of 20 active members for a Chapter (or 50 for a Charter Chapter) on this form verifies that there is the required number of International Coach Federation Members to form a Chapter or Charter Chapter.

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