



**January 22, 2007**

## **"2006 Year In Review"**

**By Gerrie Dresser, PACA President 2006**

On behalf of the 2006 PACA Executive Board, I am delighted to share this "2006 Year In Review" with you. It's a summary of the PACA Board's key contributions and outcomes—aligned with each functional area's strategic objectives.

We had so much FUN and enjoyed many memorable and meaningful experiences last year. As President of this talented and highly committed group of leaders, I feel that we grew as a team, strengthened our leadership skills, and improved the professionalism of our business and strategic planning practices.

Because of the Board's teamwork, we experienced a synergy that led to even bigger results, created a higher level vision, and allowed us to focus on the bigger picture and more strategic objectives.

That teamwork and partnership with you, our members, also resulted in PACA's receiving the prestigious **ICF Chapter Award** for "**Local Spirit, Global Presence - Community Activism**" at ICF's 2006 Conference.

Click here for more details: <http://www.philadelphiacoaches.org/communityactivismaward.html>

The **ICF Community Activism Award** recognizes a local chapter that established a significant coaching presence in their communities either by successfully creating volunteer or pro bono coaching programs that benefit a segment of their local communities or developing an alliance with a community organization that brings coaching to the community or to outreach organizations.

I am honored to remain on the Board for one more year as Past President to provide an historical perspective and support, under the outstanding leadership of our President, J. Val Hastings, and the new 2007 Executive Board.

We thank you for the opportunity to be of service, and look forward to our continued success in 2007.

Warm Regards,

*Gerrie*

Gerrie Dresser  
PACA President 2006  
PACA Executive Board 2006

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[\*\*Communications – Bill Schoellkopf, VP \(resigned, 6/06\); Gerrie Dresser, Acting VP, 7/06 – 12/06\*\*](#)

### **Strategy 1: Website Management**

- Hired a Communications Team to support our strategic objectives and long term vision for PACA:
  - Website Manager, Linda O’Neill, to manage the broadcast technology of our membership publications and website enhancements/updates.
  - Communications Virtual Assistant, Sarah Lateer, to update our website and deliver our Community Calendar broadcasts, PACA Newsletter, and special announcements.
  - Website Administrator, Charley Parker, to handle technology projects.

### **Strategy 2: Newsletter Editor/Production**

- Created a vision for the monthly announcements and newsletter that has been operationalized through a dedicated Communications team and PACA Board.
- Adopted a reliable and user friendly broadcast vehicle, **Constant Contact**, to send announcements and newsletters.
- Launched the new format of our **PACA Newsletter, Community Calendar**, as well as **Important Reminders** throughout the month to keep you informed and connected. Formally established a monthly calendar and process to streamline the timely generation of these publications.

### **Strategy 3: Website Enhancement**

- Prioritized significant strategic enhancements to the website, obtained approval of the Board, and handled implementation in a phased approach to align with financial considerations.

- Continuously enhanced our website to reflect the professionalism and member benefits of our PACA Community. A few of these enhancements include the following:
  - From the Home Page, you can “Check Out What’s New.” You’re one click away from finding out what’s new and exciting.
  - Expanded Member Resources Area:
    - No need to worry if you missed a SIG or Business Development Series Call. You can now listen via MP3 recordings at your convenience.
    - Miss a meeting? Members can download meeting handouts!
    - Missed a past Community News or President’s Message? They’re always available for review!

## Corporate Affairs – Bob Isaacson, VP

### Strategy 1: Community Coaching Connection

- Launched the **Community Coaching Connection** that is described in our PACA April newsletter and press releases. This is a first in PACA’s eight year history!

Community Coaching Connection is a PACA volunteer project in which our organization donates money and coaching services to a worthy nonprofit agency in the greater Philadelphia community during the December holiday season. Last year, the Board chose to make the donation to Family Support Services, Inc. (FSS), an Upper Darby-based community organization that provides services to children and their families.

Nine PACA coaches volunteered to coach 9 supervisors and first line managers on FSS staff twice a month for 6 months. PACA also donated \$1,000 in December of 2005. The conservative estimated value of our coaching services is in excess of \$20,000.

For more details, click on links below for 2006 press releases:

[http://www.philadelphiacoaches.org/pdf/PACA\\_FamilySupportServices.pdf](http://www.philadelphiacoaches.org/pdf/PACA_FamilySupportServices.pdf)

[http://www.philadelphiacoaches.org/FSS-CCC\\_PressRelease.pdf](http://www.philadelphiacoaches.org/FSS-CCC_PressRelease.pdf)

<http://www.philadelphiacoaches.org/Press%20Releases/CommunityActivismAward.pdf>

### Strategy 2: Corporate Coaching SIG

- Offered monthly **Corporate Coaching SIG** calls, led by **Ginger Jarrett** and **Karen Spofford**. This SIG provided a community for rich and interactive dialogue on topics of interest to the SIG members.

### Strategy 3: Interactive and dynamic Corporate Affairs web pages

- Because of the higher priority of the Community Coaching Connection, this strategy was postponed until a later date.

## Education – Connie Rose, VP

### Strategy 1: Deliver diverse and meaningful programming with a sense of **fun** and **community**.

- Featured **top shelf, high quality speakers** for growth and development of PACA members and the Philadelphia coaching community. A few specific events included presentations by nationally recognized business coach, Michael Charest, Open Forum with ICF 2007 President, Kay Cannon, and special event with David Rock on Brain-based Coaching.

- Incorporated **Seasoned Coaches Steering Committee's** recommendations into our ongoing programming, and offered two seasoned coach specific programs: Expanding Your Strategic Influence: An Integrated Approach to Coaching; Seasoned Coaches' panel on "Take Your Coaching Business to Six Figures and Beyond".
- Offered monthly **ICF Credential Mentoring Calls** for members, facilitated by Ken Abrams, MCC and PACA founding member/Past President, and chair of our **Credential Sub-Committee**.
- Held **Spirituality SIGs** on monthly basis with J. Val Hastings and Jack Hartke serving as Committee Chairs and facilitators. Included topics such as Metaphysical Mentoring and The Spiritual Values and Aspects of the 6 Advisors Assessment & Coaching Program.

### **Strategy 2: Create Business Development Series.**

- Launched our **Business Development Series**, focused on business success of our members, with Steve Mitten, ICF 2005 President, speaking on "5 Steps for Finding Your Dream Niche – How to Find Where Your Passions Meet Your Market's Greatest Need".

### **Strategy 3: Create leadership opportunities.**

- Created opportunities through our **Library Sub-Committee**, chaired by Lorraine Calhoun, **Education Marketing**, led by Chris Coward.

## **Finance – Sue Guiher, Treasurer**

### **Strategy 1: Bank Reconciliation-Monthly, Quarterly, Annual**

- Analyzed financial reports and compiled into **Treasurer's Report** each month for approval by the Board.

### **Strategy 2: Tax Report**

- Prepared our annual **Tax Report** to ensure that we are in good standing as a 501C3.

### **Strategy 3: Budget/Finance Committee, Chair**

- Chaired the **Finance Committee**, prepared a budget for each functional area, and monitored the budget throughout the year with high integrity stewardship of our financial decisions and ongoing reports.

## **Marketing – Jim Marley, VP**

### **Strategy 1: Branding Positioning**

- Incorporated **PACA's Vision Statement** into our internal/external communications.
- Identified **website enhancements** that are needed to reflect PACA as an ICF Charter Chapter and reflect the status of coaching as a profession. These include Code of Ethics, Coaching Competencies, Credentialing, and Training Schools.

### **Strategy 2: Outreach Campaign**

- Formalized **Strategic Alliances** with two professional associations and outlined objectives of our partnership:
  - Association of Career Professionals International – Philadelphia Chapter
  - National Speakers Association – Mid-Atlantic Chapter

Initiated conversation with two other professional associations about strategic partnerships: Greater Valley Forge Human Resource Association (GVFHRA); Philadelphia Region Organizational Development Network (PRODN)

- Launched a partnership with the Philadelphia Mayor’s Office on Health and Fitness and sponsored a table at the PhillyFit Bash, the largest fitness bash in the Philadelphia Region.

### **Strategy 3: Marketing Strategies/Communications, Public Relations/Promotion**

- Created and submitted **press releases** for Community Coaching Connection – 2005 and 2006 recipients and ongoing updates, ICF Chapter Community Activism Award, PACA Members who were speakers at ICF 2006 Conference, and ICF announcement about six ICF Chapters that received a Chapter award.
- Developed a **Media Press Kit**, and obtained review input from Julie Fuimano and Haas Tobey.
- Updated our list of **Media Contacts**, and transferred responsibility to our VA to standardize and streamline monthly event broadcasts and special press releases.

### **Membership – Laura Hammons, VP**

#### **Strategy 1: Provide a welcoming environment for members and guests.**

- Continuously improved and provided a professional, organized, and efficient registration process that supported the **Hospitality Committee’s** availability to welcome each guest and handle logistical issues as they arose.
- Initiated an **Outreach** to our broader member community to keep in touch and stay connected.
- Researched the cost and meeting logistic tasks that could be handled by a **Virtual Assistant**, and compared PACA meeting logistics with other ICF Chapters. Analyzed the cost-benefit of PACA hiring our first Virtual Assistant, and obtained hiring approval from the Board in May 2006.

#### **Strategy 2: Promote membership benefits to members and guests.**

- Continually collaborated with Website Manager to ensure that member benefits were updated on the website and visible to our PACA Community.

Identified the importance of the links on the PACA website “For Our Members” and “Hire A Coach” to our members’ coaching mastery and business growth, and proposed enhancement to increase the benefit to our members. These are being considered for 2007 website enhancements.

#### **Strategy 3: Recognize the leadership and volunteer contributions of our members.**

- Launched our new **Recognition Committee**, led by Aili Pogust, and gave support to a fun and memorable recognition exercise at our December 2006 Holiday Party.

- Facilitated the Executive Board's identification of two **Outstanding Volunteers for 2006**, Haas Tobey and Lisa Kramer, and coordinated their recognition in December 2006.

## Organizational Reports – Val Boyko, Secretary

### Strategy 1: Executive Board Monthly Meeting Recording/Minutes

- Consistently produced minutes from each Executive Board meeting and corresponding documents.

### Strategy 2: Organizational Reports (Board, Organization)

- Initiated formalized and centralized archiving of historical documents and information in hard copy, CD, and web-based formatting.

## Past President / ICF Liaison, Julie Fuimano

### Strategy 1: ICF Positioning; Charter Chapter Transition; PACA By-Law Updates/Revamp

- Became an official International Coach Federation **Charter Chapter in March 2006!**
  - **Julie Fuimano** led the 2006 efforts to complete our ICF Charter Chapter application, and partnered with **Colleen Bracken** on revamping **PACA By-laws** to reflect our Charter Chapter position.
  - **Laura Hammons**, VP Membership and **Sue Guiher**, Treasurer, assisted with the finalization of the documentation required.
  - **Nancy Baker**, ICF Transitional Task Force & PACA Founding Member, acted as an advisor to the team.
- **By Laws Update:** Complete overhaul was conducted by Julie Fuimano, and reviewed / edited by Haas Tobey and Cheryl Vermey.

### Strategy 2: Member Survey

- Led our annual **Member Survey** project that provided input to our knowledge-based 2007 Strategic Plan/Objectives by President elect, J. Val Hastings. Summarized results and published in our August 2006 PACA Newsletter.

### Strategy 3: Nomination Process/Cycle

- Facilitated PACA's Nomination Cycle with Julie Fuimano as Committee Chair and Committee members, Susan Race and Paula Gregorowicz. Announced the results in our November 2006 PACA Newsletter.

## President-elect, Val Hastings

### Strategy 1: Prepare to represent our PACA membership as President in 2007, and lead definition of Strategic Objective for 2007

- Analyzed results of Member Survey, ICF Strategic Plan, input from PACA members and Executive Board to develop Strategic Objectives for 2007:
  1. **Create a coaching community that fosters professionalism and connection among its members and guests.**
  2. **Increase our emphasis on professional standards and coaching mastery.**

### 3. Promote the VALUE of PACA and Coaching to the Philadelphia area.

- Built relationships with PACA members, Executive Board members, and provided leadership input at PACA Executive Board meetings; participated in ICF Leadership Salon and ICF Chapter Leader calls on monthly basis.

#### Strategy 2: Support President in achieving our goals for PACA in 2006.

- Sponsored Speaker and facilitated October Monthly Meeting; facilitated September Executive Board meeting.

#### Strategy 3: Leadership Project: Senior Coaches Steering Committee

- Co-chaired **Senior Coaches Steering Committee** with **Lisa Kramer** with an objective to research the educational needs and interests of the experienced coaches and present a proposal to the Board with their results and recommendations.

**Outcome:** Board approved the Committee's proposal, and integrated the Committee into our ongoing programming by the Education Committee for ongoing seasoned coaches special events. First program was the Six-Figure Coaches Panel event held in May; second program was Fall 2006.

#### President, Gerrie Dresser

- Finalized PACA's Vision Statement in collaboration with PACA founding members and thought leaders (former Committee Chairs, Board Members)
- Facilitated PACA Executive Board's Leadership Retreat in February that included an exercise about leadership partnerships, strategic/tactical planning clinics, introduction of our 2006 Business Success Dashboard, and our 2006 'personal dream' exercise.
- Standardized Board Reports to concentrate the Executive Board's efforts on their three strategic points of focus, and continued to improve and streamline the strategic and tactical planning process.
- Created three new roles in our Volunteer Community to better serve our members:
  - **Coach Referral Service Liaison** (Colleen Bracken, Past President 2004): As PACA grows, more and more people and organizations are contacting us to learn about the coaching services and specialties of our individual members. This position was created to receive, filter and publicize outside inquiries to our members. Colleen is the point person for this valuable Member Benefit and will provide strategic and tactical input on enhancements.
  - **Managing Editor Role, Communications** (Maria van Hekken, 3Q06-4Q06): In order to maintain consistent communications with our membership, this role was designed to oversee production of the Community Calendar and Newsletter and provide editing input to the PACA Newsletter.
  - **Editorial Assistant for PACA Newsletter** (Candace Smolowe): This role was developed to improve the quality of our membership communications by providing input on editing and writing contributions.

#### Many Thanks to our Volunteer Community!

Some of the many contributions by our Volunteer Community, recognized at our December 2006 Holiday Party are outlined below:

- Created monthly newsletter to update our community about our Community Coaching Connection, ICF news and to familiarize our members with our Board
- Prepared the meeting descriptions and announcements and submitted them to the communications team
- Prepared the meeting agenda and evaluation form for each meeting
- Made copies of all meeting handouts and distributed them to each seat
- Collected evaluation forms at the end of each meeting
- Served as advisors on speaker selection
- Offered credentialing teleforums
- Maintained the library inventory
- Brought and set up library for each meeting
- Tracked library borrowing and returns
- Used marketing expertise to contribute to PACA's growth
- Used expertise in developing by-laws to further PACA professionalism
- Created a welcoming environment for evening events
- Created a community of coaches who are more visible in the corporate world of coaching

**Members of our Volunteer Community include the following:** If I have missed anyone, please accept my apologies! We greatly appreciate your effort and contribution to the success of our Community.

**Communications:**

- Linda O'Neill; Sarah Lateer; Charley Parker; Darice Eppinger; Maria van Hekken

**Corporate Affairs:**

- Ginger Jarrett; Ken Abrams; Val Boyko; Chris Coward; Val Hastings; Ginger Jarrett; Pat Kilgannon; Lisa Kramer; Jackie Lesser; Maria Van Hekken

**Education:**

- Chris Coward; Ken Abrams; Lorraine Calhoun; Chris Coward; Marge Johnson; Jack Hartke

**Finance:**

- Gerrie Dresser; Sue Guiher; Val Hastings

**Marketing:**

- Haas Tobey; Julie Fuimano

**Membership:**

- Janice Brown; Aili Pogust

**Past President's Team:**

- Val Hastings; Laura Pumo; Robert "Haas" Tobey; Cheryl Moen Vermey; Susan Race and Paula Gregorowicz

**President-Elect's Team:**

- Lisa Kramer; Laura Hammons; Connie Rose

**President's Team:**

- Colleen Bracken; Candace Smolowe; Maria van Hekken

**PACA Executive Board:**

- Val Boyko; Gerrie Dresser; Julie Fuimano; Sue Guiher; Laura Hammons; Val Hastings; Bob Isaacson; Jim Marley; Connie Rose; Bill Schoellkopf