

Professional Organizers in Canada

Strategic Plan

2019-2022

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Introduction

Professional Organizers in Canada (POC) is the national association that represents professional organizers across the country. POC was launched in 1999 and has grown tremendously over the past 18 years to now include over 600 members and 14 chapters. POC members are organizing professionals, including residential and office organizers, time management and goal setting professionals, estate organizing experts and more. POC provides a shared voice and a supportive environment for members to share ideas, network and further develop their skills.

POC's Strategic Plan 2015 – 2018 focused on four strategic goals to guide their efforts and priorities:

- Education.
- Awareness.
- Member Benefits.
- Association Excellence.

The organization and its members are very proud of the many achievements over the past three years:

- Membership numbers consistently remained above 500 at renewal time.
- Updated our mission and vision statement: Providing Visibility, Credibility, and Connection.
- Developed a two-tiered fee structure for Regional and National Associate memberships
- Implemented new member services: a national Member Business Insurance Program, a new Accident Protection Plan.
- Launched a new website! Continued developing the website: French home page, Membership FAQs, media releases, and ongoing projects including French "Find an Organizer".
- Created Member Tutorial Videos for our website and hosted them on YouTube.
- Signed new affiliation agreements with NASMM (National Association of Senior Move Managers) and APDO (Association of Professional Declutterers and Organisers [UK]); Formed partnership with Canadian Diabetes Association Clothesline Program.
- Recruited 10 new Associate Members along with 12 renewals. We currently have 22 Associate Members.
- Awards Committee created new policies and procedures for the Ambassador Award and updated existing procedures.
- Updated most of the POC Teleclasses and handouts; Renamed the CTP (Comprehensive Training Program) to the Launch and Grow Your Business Program; Course evaluation forms were introduced to gather feedback from the participants; Created a facilitator RFP and application

form and recruited four new facilitators; 56 candidates earned their Trained Professional Organizer certificate.

- Created a volunteer management process including the Volunteer Application Form, a Code of Confidentiality, Roles and Responsibilities (by committee), Boundary Documents and a Steps To Resolution Policy.
- POC Post grew to 2,800 subscribers with an average click rate of 23%; developed a procedure for selling ads in POC Post.
- Increased our media-ready spokesperson list by 40%, expanding our geographic pool.
- Launched the POC Influencer program for social media, added Google Plus as a platform; Hit 13,053,020 impressions in public relations.
- Adjusted our fiscal year end to June 30th in compliance with the pending Not-for-Profit Corporations Act in Ontario; implemented an anniversary renewal system for membership; initiated a thorough review and revision of the Policy and Procedure Manual.
- Revised the POC Bylaws to be compliant under the Ontario Not-for-Profit Corporations Act.

These successes can be attributed to the dedicated efforts of the Board of Directors and over 100 volunteers over the past three years. Our highly committed volunteers are engaged in Board work, committees, and chapters and are essential to the work and success of POC.

The POC Board launched a new strategic planning process in early 2018 to consult broadly and create a new strategic plan for 2019 to 2022. The process was supported by a planning facilitator and included a member survey, a Board survey, individual interviews and a Board planning session. The following strategic plan is intended as a roadmap to guide the activities and priorities of POC over the next three years.

Mission and Vision

Providing Visibility, Credibility, and Connection.

Four Key Strategies

POC established four key strategies to guide the activities in meeting the POC mission and vision.

Professional Development

Design and deliver educational programs across diverse business specializations and experience levels, promoting professional excellence.

Value and Awareness

Develop and share content, messaging and resources that support POC and members to raise awareness locally, nationally and internationally.

Member Services

Promote member recruitment, engagement, retention and recognition.

Enhance member services to best meet the needs of members for their professional success.

Association Excellence

Follow and promote best practices in governance, leadership, management and volunteer engagement.

Goals are outlined for each of the four key strategies. These goals will guide POC for the next three years.

Strategy #1: Professional Development

Design and deliver educational programs across diverse business specializations and experience levels, promoting professional excellence.

Our longer-term aspirations

POC seeks to be the recognized leader in training and education of professional organizers. We aim to have a contemporary platform of on-line and readily accessible formats for high quality educational content and seek to offer programs for professional organizers, associate members and the general public. The scope of our educational programs will be broad and may include content on leadership, coaching and mentoring.

Goals for Next Three Years

- 1.1 Undertake an education needs assessment and develop a multi-year education plan for content and program offerings.
- 1.2 Expand the provision of educational programming through on-line platforms.
- 1.3 Develop standards and guidelines for becoming a POC member.

Tracking progress on goals

Progress in achieving these goals will be monitored through:

- Completion of a need's assessment and education plan.
- Number of courses offered on-line.
- Registration numbers for courses.
- Course evaluations.
- Report on development of practice standards and guidelines for becoming a POC member.

Strategy #2 Value and Awareness

Develop and share content, messaging and resources that support POC and members to raise awareness locally, nationally and internationally.

Our longer-term aspirations

Our vision is a future where professional organizers are widely known and familiar to a majority of home owners and businesses and where professional organizers are significant contributors in the range of home and office services. We see professional organizers having a recognized industry designation by 2023.

Goals for the Next Three Years

2.1 Expand partnerships and outreach activities with local and provincial organizations, mental health organizations and community agencies, with the support of concise messaging and branding and the provision of pro bono activities.

2.2 Expand French content on the POC website and across educational programming.

2.3 Discuss with the National Association of Productivity and Organizing Professionals (NAPO) collaboration to develop a National Organizing Campaign in conjunction with the U.S. campaign.

2.4 Continue to pursue, in partnership with NAPO, an industry designation for professional organizers.

2.5 To create a shared content program for associate members at a cost to them.

Tracking progress on goals

Progress in achieving these goals will be monitored through:

- Number of partnerships and outreach initiatives.
- Proportion of French content on website and across educational programs.
- Development of a plan for national/ international campaign.
- Initiate the development of a shared content program for associate members.

Strategy #3: Member Services

Promote member recruitment, engagement, retention and recognition.

Enhance member services to best meet the needs of members for their professional success.

Our longer-term aspirations

POC seeks to double its membership through new member recruitment and member retention. We aim to substantially increase the engagement of members in advancing POC initiatives and building the profession. We will seek to increase member engagement through multiple social media platforms.

Goals for the Next Three Years

- 3.1 Increase membership by 10-15% per year through new recruitment approaches and retention strategies, including the establishment of membership tiers, member surveys, volunteer surveys.
- 3.2 Create new messaging, graphics, video and infographics to best show the value proposition of membership in POC.
- 3.3 Expand initiatives and approaches to inform the general public regarding professional organizers and their role in home, office and corporate services.

Tracking progress on goals

Progress in achieving these goals will be monitored through:

- Membership numbers, recruitment and retention tracking.
- Member and volunteer survey results.
- Social media platform analytics.

Strategy #4: Association Excellence

Follow and promote best practices in governance, leadership, management and volunteer engagement.

Our longer-term aspirations

POC will continue to maintain highly effective governance and efficient management. We aim for robust succession planning for board, chapters and committees to ensure smooth transitions and comprehensive volunteer supports. All policies, procedures, position descriptions and skills criteria, instruction manuals and volunteer guidelines will be readily accessible and up-to-date. POC will communicate to volunteers that this information is available to them along with organizational support for their training and success. POC will strive for meaningful volunteer recognition. Ethics courses will be an important component of membership.

Goals for the Next Three Years

- 4.1 Develop and implement a succession planning process for board positions.
- 4.2 Institute a process to ensure policies and procedures are kept current, and instruction manuals for targeted portfolios are established.
- 4.3 Develop a comprehensive recruitment process for volunteer positions, including clear position descriptions, and descriptions of skills and benefits.
- 4.4 Enhance volunteer recognition generally and include recognition of chapter volunteers.
- 4.5 Create and implement an ethics course as a mandatory requirement of membership.

Tracking progress on goals

Progress in achieving these goals will be monitored through: the finalization of a succession planning process

- Regular reports on policies and procedures that require updating.
- Number of instruction manuals developed for targeted portfolios.
- Number of position descriptions and skills outlined for volunteer positions.
- Volunteer survey responses.

Priorities for year 1

This strategic plan provides guidance and direction across a wide range of topics from professional development and building awareness to member services and organizational excellence.

It is important to clarify that the goals are targeted for the next three years. The POC Board has outlined the following priorities to be addressed in year 1. This will lay a strong foundation on which to begin work on the remaining goals over the 3-year horizon.

Key Strategy	Priorities Year 1
Professional Development	1. Conduct a needs assessment and create an education project plan, with the assistance of an education consultant. 2. Move courses online, including webinars, establishing a strong on-line platform for education.
Value & Awareness	3. Expand French language translation of website content and education courses.

	4. Pursue a presence for POC on websites of partners, associate member businesses and other agencies/ businesses. Aim for 2 to 3 businesses in year 1.
Member Services	5. Establish a tiered membership structure for POC membership. 6. Introduce a member-to-member recruitment reward / incentive.
Association Excellence	7. Develop instruction manuals for targeted portfolios, along with a process for review and maintenance. 8. Develop a comprehensive volunteer recruitment, retention, and recognition strategy.

What is Needed for Success

Several key foundational aspects require some attention to ensure success of the strategic plan outlined.

1. **Optimal use of resources**, particularly those of AssociationsFirst, which has provided tremendous support to POC over the past number of years. Regular assessment of how best to use these resources will help to free up resources to support new priorities.
2. Institution of **regular metrics and measures** to ensure rigorous tracking of key POC activities, allowing year-over-year comparisons.
3. Ensure consistency around translation, editing and branding.
4. **Attention to workload** for volunteers with significant work portfolios to avoid burnout and ensure attractive mandates for volunteers.