

Annual Report 2023-2024



2023-2024 National Board of Directors





Stephanie DeakinDirector of Membership



Allison Weigensberg
Director of Education



Adeilah Dahlke
Director of Community and
formerly Director of
Marketing &
Communications



Julie Witherell
Director of Volunteers



Noreen Music Vice President & Incoming President



Edie MichelDirector of Finance



Cindy Wezenbeek
President

Diversity, Equity, Inclusion & Belonging (DEIB)

Diversity

We acknowledge all the ways in which people differ within our association. This includes characteristics such as: Age, gender, race, ethnicity, national origin, sexual orientation or identity, religion, education, neurodiversity, and/or physical ability.

Equity

We recognize that advantages and barriers exist, and that people start from different places. Our goal is to uncover and correct imbalances that inhibit access to opportunities and resources within our association.

Inclusion

We will work to make all members and interested parties feel welcome, valued, invited, and provided opportunities to participate and contribute at all levels of our association.

Belonging

It is our goal to be a community in which all members feel safe, accepted, and have a sense of connection within our association.

Professional Organizers in Canada is committed to being a diverse, equitable and inclusive community where all members are valued and respected. We embrace all life experiences and backgrounds, and strive to ensure that all voices are heard and appreciated, and that all feel welcome to participate.





Strategic Direction (2024 – 2026)



The POC board of directors are renewing and updating the strategic plan for the next three years to guide the activities in meeting the POC mission and vision.

1st Strategic Goal: Membership

 Promote member recruitment, engagement, retention and recognition. Enhance member services to best meet the needs of members for their professional success.

2nd Strategic Goal: Association Excellence

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

3rd Strategic Goal: Value & Awareness

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

4th Strategic Goal: Professional Development

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

President's Board Report





President's Report

Introduction

I would like to thank all our volunteers that work tirelessly to ensure POC operates smoothly. This year I have a few groups of people to thank. In particular, the Chapter Executives who have helped to transition to the new Community model. All Chapter Executives served our members to ensure they had networking and professional development (PD) opportunities. Thank you to all the chapter volunteers past and present for all their efforts over the years. Our wish with the new Community model is to make POC volunteers' lives easier by bringing PD planning to a regional level and consolidate the efforts into 3 day long events during the year instead of all 11 chapters working to deliver PD to a smaller amount of members. Networking will be at a local level and much simpler to orchestrate. Next, the 25th Anniversary Committee and the National Conference Committee for their extensive efforts on what they delivered and accomplished this year. Both have been absolutely outstanding!

Lastly, to the Board of Directors, thank you so much for your extra efforts put forth during this year of transition to a new management company, restructuring of the chapters and working through the pivot of conference from in-person to virtual. These challenges have and will produce many great outcomes for the association!

Thank you for taking on all this extra effort on behalf of our members for the benefit of the association.

As President, my role has been to support Board Vision, Board Management, Corporate Governance and steer International Relationships. I also sat on the Awards and Ethics Committee's as the board liaison, oversaw the Nomination, Election and AGM processes as well as collaborated with IFPOA for WOD and NAPO to prepare the NAICS application. Below are accomplishments within these areas this year.

1. Board Vision & Support

Our board has worked diligently to clarify and enhance our vision, ensuring that we continue to lead the organizing profession across Canada. Key initiatives included:

- Strategic Planning Sessions: We engaged in productive discussions to align our goals with the needs of our members and the industry. Our updated strategic plan sets clear objectives for growth, member value and development.
- **Member Engagement:** Our new management company, MCI, conducted surveys and focus groups to gather your insights, helping us shape next steps and to better serve our diverse membership.

2. Board Management & Support

Effective board management is crucial for our success. This year, we implemented several strategies to enhance our governance:

- Chapter Structure: We refined our chapter framework, reducing the workload on our volunteers, empowering members to take an active role in the restructuring initiatives and encouraging collaboration of chapter executives across the newly established regions to work smarter and not harder.
- New Management Company: We listened to our members and volunteers, and undertook a lengthy process to revise the scope of work, go to RFP for candidates and transition to a new management company to take us into the future. The experience has been eye-opening and involved deep learning as a board.



President's Report

3. Corporate Governance

Maintaining strong corporate governance is essential for our credibility and effectiveness. Our efforts this year included:

- **Policy Updates:** We reviewed and updated our governance policies to align with best practices and ensure compliance with legal and ethical standards.
- Transparency Initiatives: We increased our commitment to transparency by publishing reports on our strategic initiatives, allowing members to understand our priorities. Inviting members and volunteers to be involved with the chapter restructuring process.

4. International Relationships

Expanding our international relationships has provided valuable opportunities for collaboration and furthering the industry's recognition. This year, we achieved the following:

- **Global Partnerships:** Through our membership in the International Federation of Professional Organizing Associations (IFPOA), we grew our connections with organizing associations around the world, sharing resources and best practices that enhance our offerings.
- Participation in International Conferences: Our representation at key international events allowed us to showcase Canadian organizing practices and gain insights from global leaders in the field.
- North American Industry Code System (NAICS) Application: We are in the process of collaborating with NAPO, ICD, NASMM and Mexico representatives to put forth a joint application for January 2025 deadline. This application will hopefully allow Professional Organizers and Productivity Specialists to obtain a distinct industry code for the profession and sub-categories within it. The qualifying process is long after the applications are in and successful applications will be announced in June 2027.

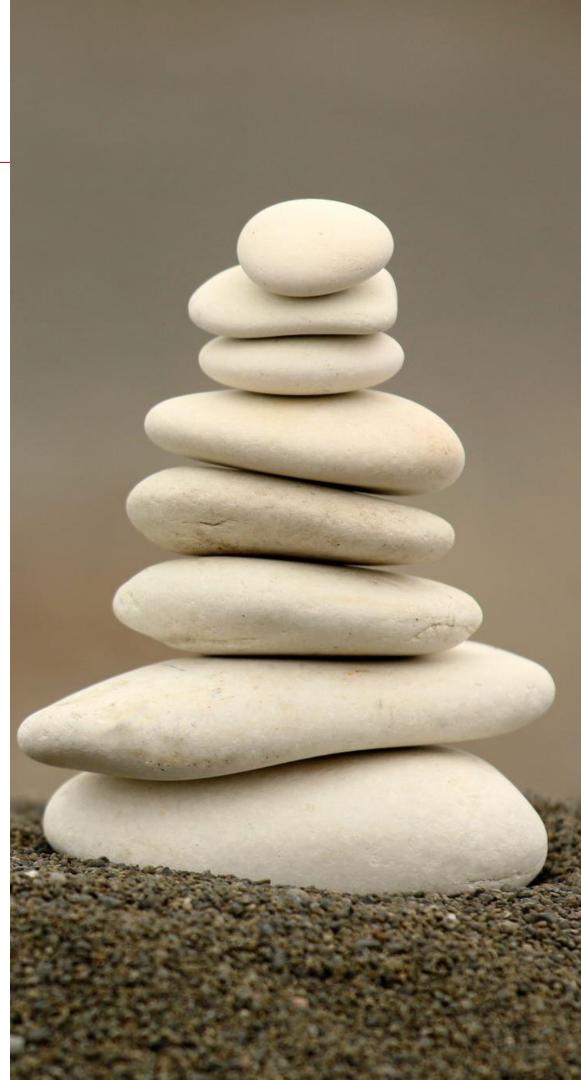
Conclusion

As we reflect on the year, I am proud of what we have accomplished together. Your engagement and support as members and volunteers have been instrumental in driving our initiatives forward. Looking ahead, I am excited about the potential for growth and the continued strengthening of our community. Together, we will elevate the profession of organizing in Canada, North America and the World.

Thank you all for your commitment to Professional Organizers in Canada. I look forward to another year of collaboration and success as I step into the Past President role and support Noreen Music as your new President. Her experience in the corporate business world and many years of volunteering with non-profits will ensure POC has a strong future with much value for our members.

Cindy Wezenbeek

President 2022-2024, Professional Organizers In Canada Incoming Past President



Director of Finance Board Report





Director of Finance Report

2023-2024 Fiscal Highlights

Revenue

- POC's total revenue was \$217,166 during the fiscal year, a decrease of about \$15,000 from the previous year.
- Revenue from Membership was \$132.547, a decrease of approximately \$7,000 compared to the previous year.
- The POC Education Program, which includes TPO credit and non-credit
 classes and exams, generated \$58,574 in
- revenue, a decrease of \$3,000 from the previous fiscal year; however, the portfolio enjoyed \$46,000 in net revenue with
- reduced expenses as the new course creation project is largely completed.
- The virtual summit had gross revenue of \$16,200 compared to \$24,623
 in fiscal 2023. Revenue was below expectations resulting in a \$3000 loss.
- The Development Portfolio produced \$4200 in revenue, which is almost the same as the previous fiscal year.
- And lastly, POC's investments produced \$5,645 in interest income compared to \$2,751 in the previous fiscal year due in part to higher interest rates on investments.

Expenses

- Administrative expenses increased this year to \$168,498, compared to \$103,338 last year. This line item includes management company, legal, accounting and
- insurance fees.
- Membership expenses decreased almost \$30,000 during this fiscal year as Chapters used the excess balances in their accounts to fund activities.
- Communication expenses decreased by \$7000 year over year.
- Education expenses decreased by almost \$10,000 as new course completion was achieved.
- Conference and summit expenses increased by about 25% to slightly over \$19,000.
- Board expenses increased by \$24,000 during 2024 to facilitate an inperson board meeting with the new management company.
- Marketing expenses decreased significantly from \$9,797 to a little over \$4000 as the Director of Marketing and the new management company assumed more responsibility for this role.
- The overall expenses for 2024 were \$267,058, \$40,138 more than the previous year.

I can report that POC ended the 2023-2024 fiscal year with a deficit of \$49,892 of revenue over expenses compared to a \$5,073 surplus last year. Net Assets remained strong at \$325,081 down about \$7,700 from the previous fiscal year.

The full Statement of Financial Position and Statement of Operations and Net Assets are available online.



Director of Membership Board Report





Director of Membership Report

Over the past year we have worked hard on finalizing the new strategic plan. It places a strong focus on both increasing membership and improving the value of membership. We've also worked to familiarize MCI staff with the way POC operates, and what our members want.

We've roughed out some ideas for new membership levels, to include standards for becoming a POC member. We hope to begin introducing these when we have a new director of membership in place.

We looked at what we can offer to our more senior members, and also those who are between Silver Leaf and Gold Leaf. Platinum Leaf digital badges are being created and will be sent to our ten Platinum Leaf (20 years +) members soon.

We initiated a "Did you know..." section of POC Talk, to remind members of the many benefits available.

These benefits include:

- ✓ being part of a nationwide association with a 25-year history
- ✓ conference and education discounts
- ✓ use of the POC logo and digital badges for TPO, leaf status, and award winners
- ✓ a listing on the "Find an Organizer directory
- ✓ special rates from our business insurance provider
- ✓ a health insurance program
- ✓ special interest groups
- ✓ access to hiatus and compassionate leave
- ✓ POC Talk
- ✓ discounts from corporate partners
- ✓ mentorship opportunities in a community of organizers & productivity specialists with 20+ years of experience
- ✓ and no-fee access to learning opportunities, networking, and social media groups

The POC board of directors will continue working to improve your membership experience, and to attract new members. If you have ideas or comments, please contact dir-membership@organizersincanada.com



New Leaf Members This Year – Congratulations!









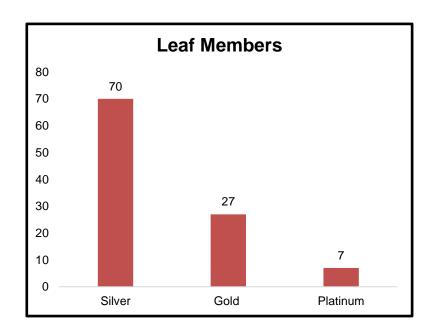
- 1. Noreen Music
- 2. Cara Persram
- 3. Sheeba Uzzaman

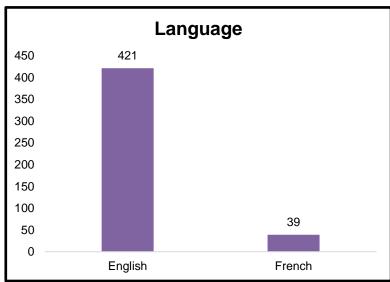
- 1. Daina Benson
- 2. Alison Lush
- 3. Desiree White-Raagner

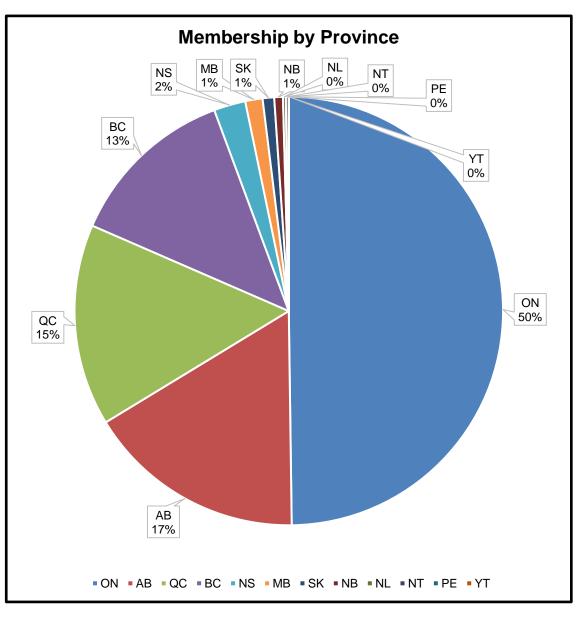
- 1. Lorrie Gray
- 2. Marie Potter
- 3. Colette Robicheau

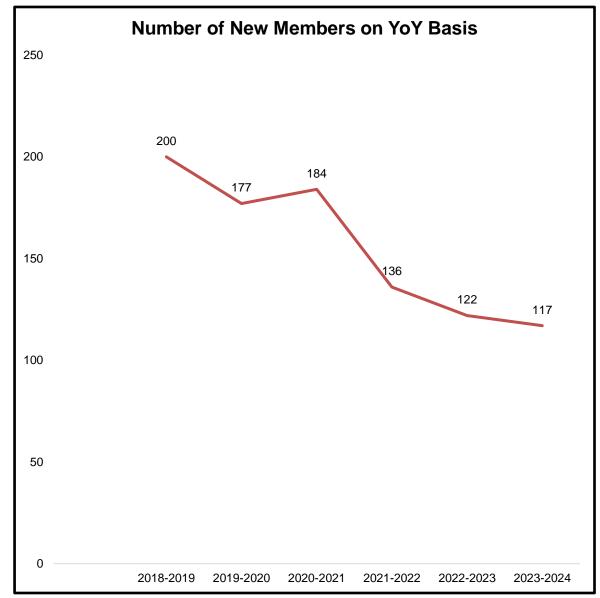
Membership Report – <u>460 Members</u> on 30th June 2024











Director of Education Board Report





Director of Education Report

This past year the Education Committee continued to expand the list of course offerings. These on-demand courses represent the completion of the Trained Professional Organizer (TPO) core courses, as well as new elective courses. In keeping with the goal of language inclusivity, they were all filmed and released in both French and English:

- Marketing Your Organizing Business
- •Productivity & Time Management for Professional Organizers
- Introduction to Virtual Organizing
- Organizing for Families

We continue to offer "Should I Become an Organizer" as a live course in English monthly, and in French, with limited attendance, approximately every other month.

The Education Committee continued its work towards making the learning platform inclusive by prioritizing the simultaneous release of courses in both official languages, incorporating a wide variety of learning styles, and adopting gender-neutral terminology whenever possible. When gender neutrality wasn't feasible, such is often the case in French, we defaulted to the female in order to be more representative of our current organizing population.

The TPO Exam was again revised and updated to accommodate the continued overlap between zoom and on-demand courses, and remains an interactive design. This allows participants to choose their language and pool of questions based on the mode in which they took the course. The free live Q&A session was also made available to all exam registrants in order to review the format of the exam and answer any questions they may have leading up to the exam.

In the last fiscal year the Education Portfolio brought in \$58,574 in revenue, which includes \$46,571 in revenue from the on-demand courses. During this past year 30 participants took part in the TPO exam and 60 potential organizers attended the Should I Become An Organizer class (combined French and English).

Thanks to our dedicated body of volunteers the Education Committee currently has three members: Diane Woodworth, Elizabeth Alescio, and Samantha Stermac. We thank everyone whose hard work allowed for such progress, including members Daina Benson, Collette Oswald, and Jessica Ney who have moved on to new challenges. We are also incredibly grateful to all of the course facilitators and/or course creators, our short-term volunteers, translators and presenters.

An **incredibly special thank you** is extended to Hilda Rodgers, our dedicated Education Committee Chair, as without her meticulous work and devotion to education, none of the above achievements would be possible.



Marketing, Communications, and Community Board Report





Director of Marketing, Communications,

and Community Report

Marketing is crucial to ensuring that we have a steady flow of new members, and income generating actions that keep us going. Having our membership feel connected and community-centred is a huge part of POC. I have had the pleasure of serving on the Board in roles that focus on both of these aspects, and I am excited about the changes coming to POC.

Marketing & Communications Highlights 2023-2024

- •Steady increase in followers/likes on Facebook and Instagram: Facebook has increased followers by 108 over the year for a total of 3510, and Instagram has increased followers by 435 over the year for a total of 2315 followers (as of Oct 1 2024)!
- •Worked with board members, chapter chairs, & committees to share information and updates on social media, including info about our 25th Anniversary
- •We had a successful World Organizing Day on May 20 2024, where members highlighted POC using the hashtag #WorldOrganizingDay several templates were sent out for members to use with our branding/logo, with areas for them to include their logo, headshot, and their favourite organizing tool/tip!

Community Highlights 2024

- •Starting in June 2024, we did a call out for a Community SubCommittee (CSC) to help form the structure for our new Community Model
- •The CSC was comprised of 11 members from across the country (5 from Ontario, 2 from BC, 1 from AB, 2 from QC, 1 from NT, and 1 from NS) in varying stages of their time with POC
- •The CSC worked throughout the summer to finalize ideas, and recommendations were sent to the Board

Goals for Remainder of the Year

- •The Board will finalize details of the new Community model, based on recommendations from the CSC these details will be presented to the POC membership on Oct 24th during our Virtual Summit
- •Help facilitate the changes within our Community model, so that all of our membership feel connected and excited to continue their membership in POC

Sincerely,

Adeilah Dahlke

Director of Marketing & Communications/Director of Community



Director of Volunteer Board Management





Director of Volunteer Management Report

Dear Board Members, Volunteers, and Stakeholders,

I am pleased to present the annual report for Volunteer Management for the fiscal year 2023-2024. This year, we have made significant strides in six key areas: Planning, Recruiting, Incentives, Training, Managing, and Evaluating. Additionally, we launched organic online marketing initiatives and enhanced our media outreach.

We have successfully maintained our volunteer database using the shared Google Drive Excel spreadsheet and effectively utilized existing JotForms, which have been adapted to a second language. This ensures better alignment between our volunteers and the association's needs.

We have continued to invest our time and expertise in brainstorming new volunteer positions in response to the evolving needs of the organization.

We continued to recognize our volunteers through online communications and distributed the Proud Volunteer Badge, which has boosted retention and motivation.

Support for informal peer mentoring has remained strong, and we have expanded written onboarding resources and increased the frequency of check-ins.

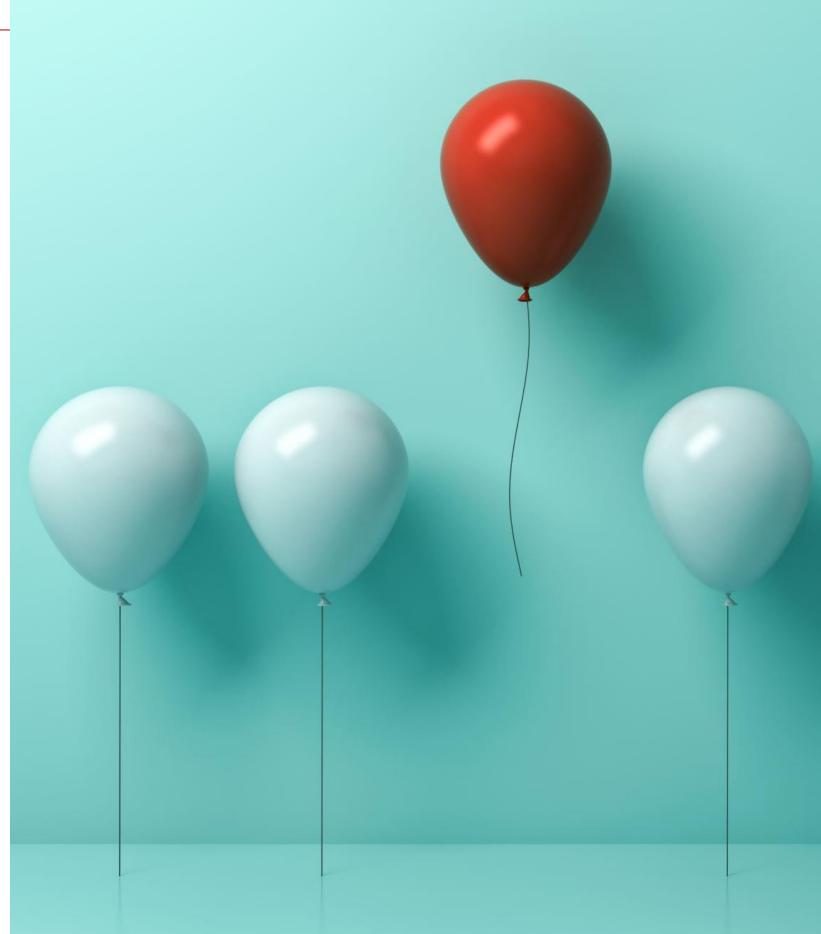
We also enhanced our POC volunteer social media presence and optimized the POC Volunteer website for improved search engine visibility and user experience.

This year, we issued several press releases to highlight key milestones in our volunteer program. Notably, for National Volunteer Week, we coordinated a media interview showcasing our 25-year history of past and present volunteers, resulting in increased visibility and recognition of our volunteers' contributions on a national scale.

In conclusion, we have made substantial progress in enhancing our volunteer management processes and expanding our outreach. These improvements have significantly increased recruitment, retention, and public engagement. We look forward to building on these successes in the upcoming year.

Thank you for your continued support.

Sincerely, **Julie Witherell,** Director of Volunteer Management



Vice-President Board Report





Vice-President Report

As the Vice-President, my role is to support the President, the strategic direction of POC and the board of directors. As the incumbent, it is also my role to "learn the ropes" from the President in order to lead the association over the next 2 years. I also sat on the 25th Anniversary Committee, the Awards Committee and the National Conference Committee as the board liaison.

It is my privilege to reflect on the year behind us and share some thoughts as we move forward. POC has accomplished much in the past year, thanks to the dedication and hard work of our volunteers, the active participation of our members and the board.

However, as we celebrate our progress, it is also important to pause and reflect critically on where we stand and where we want to go as an organization.

Strengths: Celebrating Our Wins

POC is a trusted voice in the organizing industry, and we have much to be proud of:

1.Established Reputation and Credibility

- Industry Authority: With a long-standing presence, POC is recognized as the leading organization for professional
 organizers and productivity professionals in Canada. It has built a solid reputation for setting industry standards and
 fostering professionalism.
- **Trust and Recognition:** The TPO program and member directory is trusted by clients looking for qualified organizers, giving members credibility in the marketplace.

2. Comprehensive Educational Resources

- Trained Professional Organizer Program: POC offers high-quality training courses, which help members deepen their expertise, stay up to date with industry trends, and build professional credentials.
- Ongoing Professional Development: Through our 25th anniversary webinars, annual virtual conference, and local
 networking groups, POC provides continuous learning opportunities for its members, ensuring they grow both personally
 and professionally.

3. National Network and Community

- **Member Networking Opportunities:** With members across Canada, POC provides both in-person and virtual networking platforms for members to connect, collaborate, and share best practices.
- **Supportive Community:** POC fosters a collaborative and supportive environment where members can seek mentorship, advice, and guidance from peers, creating a strong sense of belonging.



Vice-President Report

4. Advocacy and Industry Promotion

- Raising Public Awareness: POC plays a pivotal role in promoting the organizing profession through corporate partnerships, media outreach, and educating consumers about the benefits of hiring professional organizers.
- Voice of the Industry: POC advocates for the needs of professional organizers, positioning the profession as an essential service that can improve both personal and professional lives.

5. Accessible Resources and Tools

- **Member Resources:** POC offers valuable resources like business tools, marketing materials, and templates to help organizers run their businesses more efficiently.
- **Member Discounts and Benefits:** POC members have access to exclusive discounts from corporate partners and professional development resources, which can reduce operating costs.

6. Professional Standards and Ethics

- Code of Ethics: POC's Code of Ethics helps ensure that members maintain high standards of integrity, professionalism, and trustworthiness in their dealings with clients.
- **Professional Guidelines:** Members benefit from guidance on best practices, ethical business conduct, and industry norms, ensuring their services meet the highest standards.

7. Leadership Opportunities

 Volunteer Leadership Roles: POC offers numerous leadership opportunities for members to take on regional or national board positions, providing professional growth, visibility within the industry, and the chance to influence the future direction of the organization.

These strengths position us well, but they also remind us of the importance of continuing to deliver value in meaningful ways and remain viable into the future.



Vice-President Report

Challenges: Recognizing Our Weaknesses

As with any organization, growth and success come with challenges, and it is crucial that we are honest about the areas where we must improve to ensure POC remains viable into the future:

- **1.Member Retention and Diversification:** While we've welcomed new members, retaining long-standing members and attracting a range of professionals remains a challenge. We need to find more ways to serve our experienced members while also welcoming new, younger and more diverse professionals into the fold.
- **2.Technology and Innovation:** The rapid pace of digital transformation requires us to continually upgrade our systems and platforms. Our current infrastructure for website, member management, learning and communication, while functional, is very outdated. There is an opportunity to make these processes more user-friendly and efficient.
- **3.Lack of Member Engagement:** Although some local groups are thriving, others face severe challenges with leadership and engagement. Ensuring consistency in member experience and support for all members regardless of location is crucial to our national unity which is why we are currently transitioning from a chapter model to a community model.

These are not insurmountable obstacles, but they are important indicators that we must do more to evolve with the changing landscape of our industry.

The Need for Reinvention

In light of these challenges, I believe now is the time for POC to reinvent itself in ways that better align with the future of our industry and the evolving needs of our members. To stay relevant, innovative, and sustainable, we must be willing to examine our model, refresh our approach, and reimagine how we serve our members and the organizing profession.

Conclusion

As your incoming President, I see enormous potential for POC to evolve, grow, and continue being the premier association for our industry. *But reinvention requires all of us—members, leaders, and volunteers—to take part in shaping the future of POC*. I invite each of you to contribute your thoughts, ideas, and energy as we embark on this journey together.

Thank you for your dedication, your contributions, and your passion for this organization.

Noreen Music

Vice-President and Incoming President, Professional Organizers in Canada



POC Awards 2023





2023 Ambassador Award Winners





Ambassador Award Winner: Bev Chandler

Excerpt from the Awards Presentation: The **first recipient of the POC 2023 Ambassador Award** is a member who has devoted her time and energy to POC and all its members as part of the Cyber Chapter's executive since 2013 and received her Silver Leaf status in 2015.

This member has supported, educated, and advocated for many POC members across Canada. She works on projects with executive members to make an impact at the National level, and she even drives to various cities in her province to meet with and support other members of POC.

In support of her community, this POC member donates pro-bono organizing assistance to someone in need annually, has organized for her local Library and local Church, and gives yearly organizing presentations at libraries in surrounding communities, free of charge. She also volunteers her time on the board of her local Women's Network association, supporting other women entrepreneurs and is the current Chair of their POC Chapter.



Ambassador Award Winner: Stacy Walker

Excerpt from the Awards Presentation: **This year's second recipient** is a gold leaf member of POC, and a CPO who has maintained her designation for nearly 20 years. She has occupied every position on the executive board, including Chair, and is one of the founding members of her chapter. She has worked diligently over the years to build the chapter, recruit new members, and represent POC in the best possible light.

She is the co-founder of the Hoarding Disorder Foundation of Alberta, providing education to professionals in relevant fields, including emergency responders, bylaw, professional organizers, landlords, cleaning companies and more.

Within her community, this POC member has co-founded Sorting Through Hoarding, a support group where people with lived experience of hoarding disorder can talk, listen, participate in goal setting, and learn coping strategies.

She also co-developed "Safety Day", a trauma-informed intervention assisted by volunteers (including Organizers from the Edmonton chapter) for people with emergent needs in a hoarded environment.

2023 Harold Taylor Award Winners





Harold Taylor Award Winner: Elizabeth Alescio

Excerpt from the Awards Presentation: **One of this year's Award Recipients** has given guidance and direction to POC members by being involved in the executive committee of her Chapter for 4 years, acting as Translation Coordinator for the website committee for 2 years, volunteering as Chair of her Chapter's video sub-committee for 1 year and currently serving on the POC Education Committee.

She works tirelessly to ensure our French members have excellent materials to help them as professional organizers.

She has supported our industry wholeheartedly - being interviewed by and contributing articles to various media publications in which she promotes POC. She also co-founded the YouTube channel SOS Rangement to offer organizing tips to the French-speaking population, creating nearly 130 videos, with close to 280K views.



Harold Taylor Award Winner: Stéphanie Galipeau

Excerpt from the Awards Presentation: **The second 2023 Harold Taylor Award Recipient** has volunteered with POC since joining in 2015, actively participating in various local and national committees, including a notable 4-year term as Chair of her chapter. She received her Silver Leaf in 2020.

Specializing in productivity and digital organization, she has earned certification as an Evernote expert. As an educator, she imparts training in time management and digital organization across multiple professional training centers.

Her endeavors can be followed on the widely recognized YouTube channel, SOS Rangement, which she co-founded alongside her colleague.

Corporate Partners in 2023 and 2024







Thank you to our Corporate Partners!





























POC in 2025 and Beyond





POC as a Self- Managed Organization

POC has an exciting update about our partnership with MCI Group, our management company. MCI Group and POC will conclude their partnership on December 31, 2024, as part of a mutually agreed decision to transition POC to a self-managed organization.

This collaboration has been instrumental in streamlining operations, introducing the Community Model, and delivering our 2024 virtual conference, while also expanding our corporate membership. Through our joint efforts, we have embraced a transition to a self-managed model to better meet the needs of our association and its members.

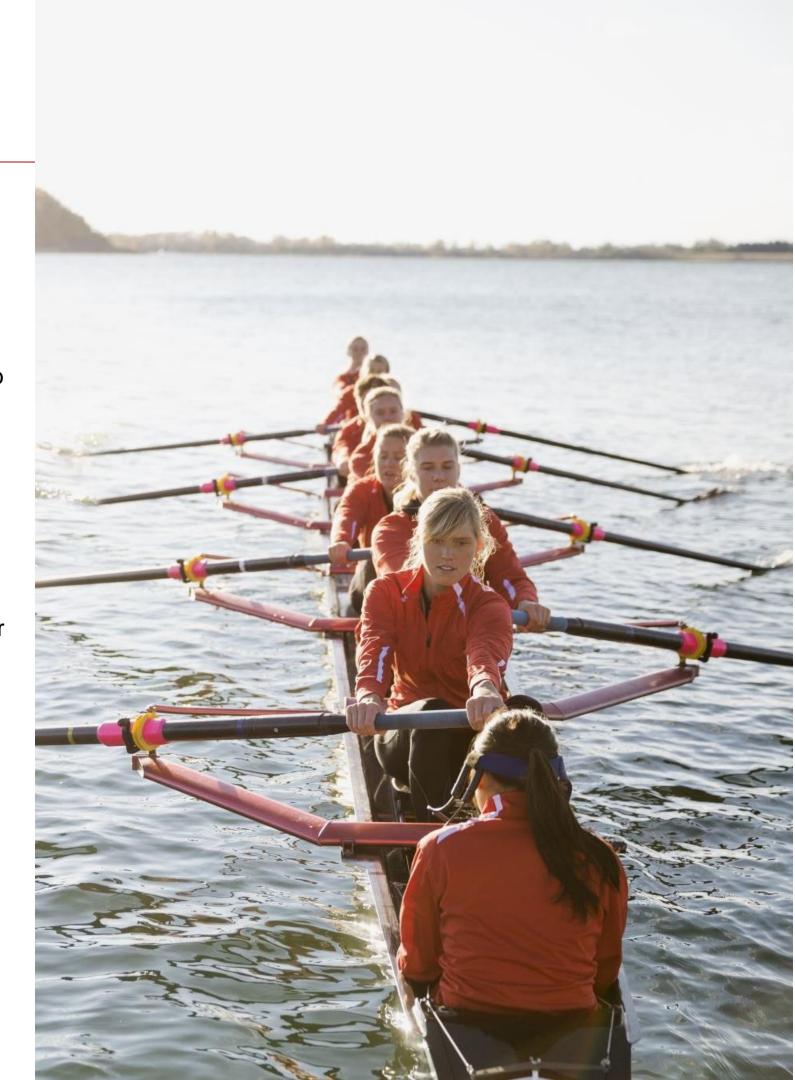
2023-2024 marked a year of transformative change, addressing challenges such as fluctuating membership levels and the need for enhanced member value. Our partnership with MCI provided clearer insights into our technological, operational, and administrative strategies, deepening our understanding of our members' needs and enhancing our value proposition.

We have also improved our capabilities to manage technology within our financial scope, setting the stage for more practical and effective solutions moving forward. Our understanding of member engagement has deepened, informed by the design thinking process, which will be vital as we advance.

Recognizing the strengths within our community, POC is excited to adopt a new self-managed model next year. We will leverage the talents of our members by contracting skilled individuals or outsourcing to independent contractors, ensuring operational excellence and adherence to our values of diversity and equity.

We are confident that with the continued support of our volunteers and members, POC will thrive in this new chapter.

We extend our heartfelt thanks to Airaj Isaacs, our Executive Director, and the MCI team for their dedication and expertise over the past year. Their contributions have been instrumental in shaping our strategic direction and will continue to influence our journey towards greater success.





Your POC Board of Directors would like to **thank you** for taking the time to review the material in the Annual Report.

We appreciate your feedback and if you should have any questions or concerns, please contact us.