

# THE BCPO<sup>®</sup> HANDBOOK

*for the  
Certification Program*



*[www.certifiedprofessionalorganizers.org](http://www.certifiedprofessionalorganizers.org)*



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## The Development of BCPO.

In 2005, a study was conducted to delineate the role of the Professional Organizer (PO). The mechanism for this study was a Job Analysis survey. The results of the study provided the basis for making a claim of the appropriateness of test score inferences. Under the supervision of Schroeder Measurement Technologies, Inc. (SMT), a survey was developed and conducted to determine the important knowledge and skill elements required for entry-level PO practice.

A Subject Matter Expert (SME) Committee was appointed to provide content expertise. The Committee was comprised of POs who represented a diversity of practice, experience, geographic regions, and education. This group of professionals, was charged with determining Job/Task Analysis (JTA) of a PO. To begin the study, SMT initiated a comprehensive literature search to develop an exhaustive list of knowledge and skill elements required for competent practice. SMT presented this list to the JTA Committee for review and approval. SMT adopted a rating scale that measured knowledge and skill element importance and frequency of practice. The JTA Committee developed a demographic questionnaire to gather confidential data describing the survey respondents. SMT then converted the demographic questionnaire and knowledge and skill element list into an online survey instrument.

Invitations were successfully emailed to 3,013 Professional Organizers. Statistical review of the responses indicated a standard error of a respectable 0.04 based upon the respondent sample size and the standard deviation calculations of the survey data. Therefore, the inferences from the survey were associated with minimal error and provided a high degree of confidence in the survey results.

Following the administration of the online survey, SMT conducted analysis on the respondent data and presented the results of the survey analysis for review by the JTA Committee. The goal of that meeting was to establish knowledge and skill element exclusion criteria to differentiate between the important and unimportant elements of PO practice.

Of the original 102 elements, the JTA Committee removed five elements from the listing. Upon review of the

suggested elements and comments made by the survey respondents, the JTA Committee added two knowledge and skill elements to the final content outline.

SMT then translated the final approved knowledge and skill element listing into a detailed content outline. During the development of the content outline, the JTA Committee determined the weight of the exam. That is, percentages of items were assigned to specific content areas to ensure consistent sampling of content on all future exam forms.

Approximately 94% of the respondents indicated that the survey either completely or adequately described the important knowledge and skill elements required of competent entry-level PO practice. This suggests that the respondents felt that the survey adequately reflected practice across North America and among various work settings and years of experience.

A Resource Committee was responsible for seeking out the reference materials available to support the content outline as determined by the JTA Committee. Another committee of SME's was trained by experts in the field of Item Writing, or crafting legally defensible test questions, which could be tied to specific references.

The final task belonged to the Program Definition Team (PDT), charged with determining eligibility criteria and relevant policies. It was determined that at this stage of our industry's growth, the primary training a PO can have is the personal interaction with clients whether as a speaker, coach, trainer or hands-on organizer, transferring or teaching or demonstrating organizing skills to that client. Therefore the largest component of eligibility credit comes from client interaction.

Each of these committees worked independently of the others so as to insure the integrity of the process. All of the teams were made up of representatives of various practice settings and levels of experience in the field. Every element of the program was created through rigorous development and debate. In consultation with the test service SMT, all of the committees followed a deliberative process, including that its decisions were supported in the underlying JTA



findings. The eligibility requirements, the policies governing the entire process supporting this Certification program and the examination itself have all been developed with an eye towards establishing criteria that will determine who are the certified organizers of the future. No decision has been made lightly.

A Program Development Committee is in place to ensure that the criteria continues to evolve as the industry evolves. The BCPO® program has been based on documented industry standards with established certification models. It is our intention to ultimately have the CPO® credential recognized by ANSI, NCCA, or a comparable credentialing authority.

With regard to the credential itself, part of the credibility and stature of being certified is that not everyone will be eligible to sit for the exam. Like any test, the CPO® examination can only test a sample of the organizer's knowledge. Thus the eligibility criteria are an integral part of the certification credential. The certification program was developed with the understanding that it would be a living program. As the organizing industry grows and evolves, the program will grow along with it, and the rules and study materials presented for the first examination will not likely be the same for subsequent years.

The professional organizing industry is poised to add its story to other accounts where social and business trends have led an industry to impose standards of professionalism, ethics and competence on itself. If history is a guide, among the many benefits will be increased recognition as an established profession, the promotion of social good by enforcing standards, and a measure of confidence in professionalism on the part of the public.

From an industry perspective, by becoming certified, an organizer will validate his or her knowledge and experience, based on the highest industry, psychometric, and legal standards. From the perspective of individual business, preparing for the examination is an opportunity to stay current in an increasingly competitive job market. From a personal perspective, sitting for the examination provides a unique opportunity to demonstrate the candidate's self-confidence, professional commitment, and personal initiative in a professional environment governed by rigorous standards. A Certified Professional Organizer® will exemplify the importance of professional standards, and contribute to evolving standards in the industry as a whole.

## What is Certification?

**T**he Certified Professional Organizer (CPO®) designation was developed by the National Association of Professional Organizers (NAPO) and is operated under the auspices of the Board of Certification for Professional Organizers (BCPO®). This certification program benefits the public and members of the profession by recognizing those professionals who have met specific minimum qualifications and have proven through examination and client interaction that they possess the body of knowledge and experience required for certification. The program recognizes and raises industry standards, practices, and ethics for the organizing and productivity profession.

Individuals are strongly encouraged to read through this handbook. In addition, recordings of FAQ teleconferences are posted on the website.

### About the BCPO®

The Board of Certification for Professional Organizers® (BCPO®) is the not-for-profit certifying body whose mission is to advance the credibility and ethical standards of the organizing and productivity industry by establishing and maintaining a professional credential that:

- identifies a body of knowledge directly related to the organizing profession
- establishes a consistent standard of education and experience required for certification
- advances the practice of professional organizing
- increases the value of organizing practitioners to their clients
- recognizes and raises industry standards, practices, and ethics
- fosters continued development of expertise in the teaching, training, transfer and demonstration of higher-level organizing skills

BCPO® follows accreditation guidelines set forth by the [National Commission for Certifying Agencies](#).

### How Certification Programs Differ

It's important to understand the difference between accredited certifications and non-accredited. A non-accredited certification does not have to follow any rules. XYZ Design School can call itself Certified ABC, can decide on a whim what the qualifications are, can change requirements willy-nilly, can make up any old test questions, and can be run as a for-profit (with profit for the founder being an important goal).

BCPO® made the decision to follow accreditation guidelines, which are determined by an international governing body. This means we work with an accredited testing company and follow all procedures to make this a valid, legally defensible and psychometrically-sound exam. There are strict procedures in place for what we're allowed to do and not do – which is why there are committees that run checks and balances systems, and policies and procedures in place to ensure that we remain in compliance with accreditation guidelines.

### What This Means to the Public

If members of the public are going to hire an individual or company to enter their private work or living space, it is appropriate for them to care about the credentials of this person. Only those professional organizers and productivity consultants who are in good standing with their CPO® credentials are listed in our directory on the Find a CPO® page. This directory can help the public narrow down their pool of qualified professionals for the service they need to those who have achieved The Industry Standard Credential®.

## Our Affiliates

### **National Association of Professional Organizers**

The [National Association of Professional Organizers \(NAPO\)](#), The Organizing Authority<sup>®</sup>, is a group of professional organizers dedicated to helping individuals and businesses bring order and efficiency to their lives. NAPO's vision is to have the world recognize the value of organizing and turn to NAPO as the leading organizing authority. NAPO's mission is to develop, lead, and promote professional organizers and the organizing industry.

NAPO<sup>®</sup> is affiliated with all of the members of the International Federation of Professional Organizers, IFPOA), including NAPO, the [Institute for Challenging Disorganization](#) (ICD, formerly NSGCD), the [Professional Organizers in Canada](#) (POC), The [Australasian Association of Professional Organisers](#) (AAPO), the

[National Association of Senior Move Managers](#) (NASMM), [Nederlandse Beroepsvereniging van Professional Organizers](#) (NBPO) and the [Japanese Association of Life Organizers](#) (JALO).

### **Schroeder Measurement Technologies, Inc.**

[Schroeder Measurement Technologies, Inc.](#) (SMT) is BCPO's testing service and administers the BCPO<sup>®</sup> certification program. SMT is an established full-service international testing company serving the needs of licensing boards and credentialing agencies with a wide range of test development and computer-based administration services at testing centers across North America. SMT's testing products and services are the finest available and are designed to serve SMT's clients by using the most appropriate psychometric and technological approaches available.

## Why Get Certified?

**L**ike many professions, the organizing and productivity industry is unregulated. Anyone with a few dollars is able to purchase business cards, set up a website and call themselves “Professional Organizers” or “Productivity Consultants.” The CPO® credential was developed so that the public knows which members of the industry have:

- achieved a certain level of experience in transferring skills to clients (a minimum of 9.6 hours per week or 1500 hours total in the three years prior to applying to take the exam or a minimum of 8 hours per week or 1250 hours total combined with up to 250 substitute hours)
- passed a grueling standardized exam developed by an accredited test development company
- pledged to adhere to the BCPO® Code of Ethics, which includes protecting the confidentiality of your situation
- continued to educate themselves in improving their clients’ well-being by taking a minimum number of continuing education classes in order to re-certify every three years
- shown their commitment to their profession and industry by earning a credential that is modeled after international accreditation guidelines

BCPO® certification is a voluntary, industry-led effort that benefits the members of the organizing profession, as well as the public. It is a recognition of professionals who have met specific minimum standards, and proven through examination and client interaction that they possess the body of knowledge and experience required for certification. This program recognizes and raises industry standards, practices and ethics. For the public, while the CPO® designation is not an endorsement or recommendation, certification of professional organizers maximizes the value received from the products and services provided by a CPO®.

### Top reasons to sit for the CPO® exam:

- Show your professionalism.
- Demonstrate that you are on the cutting edge of your industry.
- Attain instant credibility. By becoming certified, an organizer will validate their knowledge and experience, based on the highest industry, psychometric, and legal standards.
- Achieve personal satisfaction—sitting for the examination provides a rare opportunity to demonstrate your self-confidence, professional commitment, and personal initiative in a professional environment governed by rigorous standards.
- Gain recognition from clients, peers, employers, employees, coworkers, the industry, the media, publishers, and companies looking for spokespeople.
- Contribute personally to strengthening the profession. A CPO® will serve as an example for newer organizers with regard to the importance of professional standards, contributing to the developing of industry standards as a whole.
- Display your ongoing commitment to personal development and education. Preparing for the examination is an opportunity to stay current in an increasingly competitive job market.
- Differentiate yourself from the competition.
- Confirm your dedication to the professional organizing industry.

Qualifying for, preparing for, and passing the CPO® exam takes a tremendous amount of work, which is why Certified Professional Organizers wear those three letters so proudly. CPO®...the Industry Standard Certification®.

# Code of Ethics

**B**CPO® Code of Ethics for Certified Professional Organizers - BCPO® is committed to the highest ethical standards for all certificate holders, as reflected in the BCPO® Code of Ethics. Adherence to this Code of Ethics is required for the ongoing certification of all those who hold the Certified Professional Organizer® credential.

## Preamble

This Code of Ethics is a set of principles that governs the professional conduct of Certified Professional Organizers with clients, colleagues and the community. Certified Professional Organizers pledge to exercise judgment, self-restraint and conscience in their conduct in order to establish and maintain public confidence in the integrity of the CPO® certificate and to preserve and encourage fair and equitable practices among all who are engaged in the profession of organizing.

## Ethical Principles:

### Working Relationships

- I will only offer professional organizing services in those areas in which I am qualified, and I will accurately represent those qualifications in all verbal and written communications.
- I will market my professional organizing services in a lawful and honest manner.
- I will respect and not infringe upon the intellectual property rights of others.
- I will not use the proprietary materials or information of others without the owner's written permission.
- I will comply with all laws applicable to the operation of my business and my provision of professional organizing services, and I will not engage in any fraudulent or deceptive acts or practices.
- I will at all times endeavor to avoid situations in which my provision of professional organizing services to one client places me in a conflict of interest position with another client.

## Confidentiality

- I will respect a client's wishes with respect to confidential treatment of client information.
- I will use reasonable means to keep all client records and materials in my possession secure and confidential unless the client gives me written permission to make such records or materials public.

## Fees and Services

- I will establish my fees in a manner which does not involve collusion with a competitor, and I will communicate my fee and expense structure to my clients in advance of beginning the provision of professional organizing services.
- I will only recommend products and/or services that my clients need or desire.

## Acknowledgement and Agreement

*As a condition of being awarded and maintaining status as a Certified Professional Organizer®, I voluntarily agree to be bound by and to abide by this Code of Ethics, the Ethics Complaint Procedure for Certified Professional Organizers®, and any policies or procedures adopted by the Board of Directors of the BCPO®, as they are now written or may be amended in the future.*

*I will report to the Professional Practices Committee of the BCPO® my knowledge of an act or omission of another Certified Professional Organizer® in violation of this Code, or of any applicant for certification status in connection with such person's application. I agree to cooperate with the Professional Practices Committee in the investigation of alleged violations of this Code of Ethics.*

*I acknowledge and agree that, if found to be in violation of this Code, I am subject to the prescribed disciplinary sanctions of the BCPO®. I acknowledge that, in the event of suspension or revocation of my certified status, all rights and privileges of said certification would be terminated.*

# Eligibility Requirements

To be eligible to sit for the CPO® examination, a candidate must meet specific eligibility requirements. BCPO® is required to audit a certain percentage of all applications. In the event of an audit, the candidate must be prepared to provide supporting documentation for these requirements.

1. You must have a minimum of a high school diploma or equivalent.
2. You must agree to adhere to the [Code of Ethics for Certified Professional Organizers](#). (See the previous page.)
3. You must be prepared to document a total of 1,500 hours (average of 9.6 hours per week) of paid work experience conducted in the three (3) years prior to applying to take the exam.
  - This paid work experience may include (but is not limited to) on-site organizing, coaching, consulting, training, virtual organizing, interactive workshops and speaking engagements, which, **through client collaboration, transfers, teaches or demonstrates organizing skills.**
  - Up to 250 substitute hours of the required 1,500 can be earned via college degrees, relevant paid work experience prior to becoming an organizer, or military service (all of which can be accrued at any time prior to applying for the examination.) Substitute hours may also be earned via continuing education courses or professional development activities in the organizing field, or organizing-related writing and speaking engagements (if accrued in the three years prior to the application date.) Candidates must be prepared to document each of the substitute hours submitted in support of their application.

Up to 250 hours of credit towards the required 1,500 hours of paid work experience can be from one or more of the following categories:

## A. Formal Education (100 hours credit maximum)

- Associate's Degree, 50 hours credit
- Bachelor's Degree, 75 hours credit
- Advanced Degree, 100 hours credit

## B. Organizing-Related Professional Activities (within the last 3 years)

- Public speaking: actual hours, maximum of 10 hours credit
- Publishing organizing-related books: 20 hours credit per book, maximum of 40 hours credit
- Authoring organizing-related articles (minimum 500 words per article): 10 hours credit per published article, maximum of 30 hours credit
- Presenting webinars, podcasts, teleconferences and e-courses: actual hours, maximum of 10 hours credit
- Teaching/Training: actual hours, maximum of 10 hours credit
- Mentoring/Apprenticeship: actual hours, maximum of 10 hours credit
- Volunteering as an organizer: actual hours, maximum of 10 hours credit
- Professional association membership: 10 hours credit
- Serving on an organizing association's Board of Directors: 10 hours credit

## C. Continuing Education Courses relating to Organizing (within the last 3 years) - For each course, the candidate may claim the actual hours attended, to a cumulative total of 250 hours. Sixty minutes of coursework is equal to one credit hour regardless of any number of continuing education units (CEUs) another institution may have awarded for completion of the course. See Continuing

Education FAQs for detailed information regarding content suitable for earning CEUs.

**D. Relevant Paid Work Experience**

**Prior to Becoming an Organizer** - 25 hours credit per full-time year (maximum 3 years or 75 hours credit.)

Experience must include the same criteria for teaching, transfer, or demonstration of organizing skills as described in the 1,500 hours requirement.

**E. Military Service** - 10 hours credit per year (maximum of 5 years or 50 hours credit) for military service.

The eligibility of paid work hours (and substitute work hours) is based on a JTA (Job Task Analysis) conducted by a cross-section of organizing and productivity professionals from various geographic, educational, and experience level backgrounds who determined that the primary job of a professional organizer is to transfer organizing skills. Therefore, the eligibility of paid work hours and substitute hours must reflect this.

# Eligibility Requirements FAQ

## Work Experience as a Professional Organizer

### Q: How do you define the last three years?

A: When you apply to sit for the examination, you are attesting to the fact that you have met the eligibility requirements as of the date you submit your application. The “last three years” is defined as three years prior to the date you submit your application. For example, if you submit your application on October 3, 2016, your eligibility requirements must have been met between October 4, 2013 and October 3, 2016.

### Q: I organize part-time and do not have 1,500 hours of paid work experience in the last three years. Is there any way I can qualify?

A: Yes. While at least 1,250 hours of client-based work in the last three years is mandatory, you can reach the required 1,500 by substituting other activities as [outlined in the eligibility requirements](#).

### Q: When I first started organizing, I helped colleagues at my previous place of employment to get organized. Can I count the hours spent helping them as part of the required 1,500 hours of paid work experience as a professional organizer?

A: For the purposes of certification, ask yourself if those hours helping your colleagues have met the following three criteria:

- Were you paid specifically for those hours spent helping your colleagues to get organized, and was this payment separate from your salary for your regular job?
- Did the additional paid hours you worked meet the criteria for teaching, training, transfer or demonstration of organizing skills as described in the eligibility requirements?

- Was this work performed during the three years prior to applying to sit for the certification exam?
- If you answered “yes” to all three questions, these hours should count toward your 1,500 work hours. If, however, your organizing or productivity work hours were completed and paid for as part of your employment in a job other than as a professional organizer, these hours may count as substitute hours. [See the Relevant Work Hours section of the eligibility requirements for details](#).

### Q: I don't bill services by the hour, but sell programs as a package that includes a comprehensive assessment, written recommendations, system guidelines, training seminars, on-site system implementation, individual consultations, and follow-up sessions with the team and individuals. Much of this is developed off-site. Is any or all of my work eligible?

A: Eligible hours are those that involve or are the result of collaboration with a client, and may include, but are not limited to the following:

- time spent in an on-site assessment
- developing systems with the client, whether on or off site
- training
- on-site implementation and follow-up

For example, if you spend 4 hours working for a client -- consisting of 1.5 hours onsite with the client to complete the assessment, 1 hour on the phone with the client developing systems, 1 hour onsite training the client, and a half hour back in your office writing up recommendations -- the first three activities add up to eligible work hours, but the half hour in your office does not.

**Q: I have worked with clients for 20 years, but have not had 1,500 (or even 1,250) hours of work with clients in the last three years. Am I eligible to sit for the exam?**

A: No. Certification is intended for active organizing practitioners who have met the published requirements.

**Q: I work for a closet manufacturer, and install custom closet systems in people's homes. Does that work count towards my eligible hours?**

A: No. While you are providing a service that might lead to the client being more organized, you are installing the system, not organizing.

**Q: I install closet systems and garage systems as part of my organizing business, which entails an in-house assessment, design concept, installation, and working with the client to organize their stuff into the new system. How many hours of this work would count?**

A: Time spent on assessment and design of the closet, as well as working with the client to organize and adjust the new system, constitute eligible hours; time spent on installation does not.

**Q: The primary focus of my organizing work is moving and relocations. Are any of these work hours eligible?**

A: Time spent in collaboration with the client would be eligible; time spent without client interaction would not. Examples of eligible hours include, but are not limited to, working with a client to pack and store items efficiently, teaching a client to downsize possessions wisely prior to the relocation, and working with a client to develop an action plan for tasks related to the move and relocation.

## Organizing-Related Professional Activities

### Speaking Engagements

**Q: Why does speaking count for both regular hours and substitute hours?**

A: To be eligible for regular work hour credit, speaking would require some client interaction, such as working with clients to develop a customized presentation for their business or organization, or having an interactive exchange in the presentation, such as exercises or Q&A.

A speech that is “one size fits all” (without client collaboration), does not meet the client collaboration requirement, but may be counted for substitute hours.

**Q: I wasn't paid a fee for a recent speaking engagement, but was reimbursed for meals and transportation. Does this count towards my 1500 hours as a paid speaking engagement?**

A: No. Even though your expenses were reimbursed, you were not paid for speaking. If you received any payment in excess of your actual expenses, and the presentation included interaction as outlined in the question and answer above, then it would qualify as regular hours rather than substitute hours.

### Mentor/Mentee/Apprenticeship

**Q: I have been training on the job with an established organizer. Are these hours eligible, and in which category?**

A: If you are being paid and are interacting with the client, these count as eligible work hours. If you are training without pay, you may claim up to 10 of these hours in the substitute category.

**Q: I spend 5 hours a month mentoring new organizers. Where do these hours fit in?**

A: If this is being done pro bono, both you and your mentees may claim up to 10 of these hours in the

substitute category. If you are being paid by the new organizer, you are likely teaching, transferring and/or demonstrating organizing skills and principles, and these would qualify as work hours.

## Writing Books & Authoring Articles

**Q: I am a Professional Organizer who specializes in writing books. My books generally take more than 1,500 hours to write. Are any of those hours eligible?**

A: No. While writing a book qualifies you as an author, the hours spent writing do not meet the eligibility requirements with regard to collaborating with the client. This certification is for organizing and productivity practitioners, not a certification for authors. However, you may claim a total of 20 substitute hours per published book, up to a total of 40 hours.

**Q: I wrote a series of articles for my local newsletter and then collected and printed them into a book I give to my clients. Does the book qualify in the substitute category?**

A: A book, even if self-published, must be published with an ISBN to qualify for substitute eligibility hours. While a collection of your articles may prove to be an excellent client gift or marketing tool, it would not qualify.

**Q: I write a blog about organizing, and post three times a week. Do my blog posts count towards substitute hours?**

A: Possibly. As detailed in the eligibility requirements, if you've written an organizing-related article of at least 500 words for use as a blog post, and published it on your blog (or someone else's), it would be worth 10 hours credit per published article/blog post. Note that no matter how often you blog, or how many posts you publish, you may only submit a maximum of 30 hours credit.

## Professional Association Membership

**Q: Is membership in a professional organizing association (like NAPO) a requirement for becoming certified?**

A: No. Any professional who meets the [eligibility requirements](#) may sit for this examination.

## Serving on an Organizing Association's Board of Directors

**Q: What does serving on a board have to do with organizing skills?**

A: Directing the activities of an organization whose purpose is specifically targeted to the organizing profession involves the development and promotion of industry best practices.

**Q: I am a NAPO Ambassador. Does this count as serving on a board?**

A: No.

## Trainer/Teacher

**Q: I used to work personally with clients, but I have reduced my own client interaction, and hire and train employees who are sent to do the work. I spend the majority of my time speaking, training and writing books. Am I eligible for certification?**

A: Probably not. Time spent training other organizers and in speaking engagements as described above would be eligible for substitute hours; however, your eligibility would depend on satisfying all of the other requirements.

## Volunteer Work as an Organizer

**Q: Why does volunteer work qualify? I thought the requirements were for paid organizing hours.**

A: If an organizer worked for a client who could not afford to pay, or if the organizer chose to lend his/her skills to community service or a charitable institution,

the hours spent in client interaction would count towards this substitute category only, and not toward work hours.

**Q: Can I earn credit for volunteering on a professional association’s committee?**

A: No. Only volunteer work directly related to organizing is eligible for substitute hours.

## Relevant Paid Work Experience Prior to Becoming an Organizer

**Q: What do you mean by prior relevant paid work experience?**

A: Prior relevant paid work experience means you performed organizing or productivity duties as a paid employee prior to being paid to work specifically as a professional organizer (as defined above under Work Experience as a Professional Organizer).

These hours must meet the same criteria for teaching, training, transfer or demonstration of organizing skills as described in the [Eligibility Requirements](#).

For example, prior to becoming a Professional Organizer, an individual is employed as an office manager for a private company. Duties may have included training staff in organizing and productivity skills. Candidates must be able to substantiate the difference between administrative, clerical, or other aspects of their work experience from relevant organizing experience.

## Military Service

**Q: If I’m audited, what proof do you need for my military service?**

A: Upon audit, a candidate must be prepared to produce a DD Form 214 Certificate of Release or Discharge from Active Duty, or equivalent document for the country served.

## Education

**Q: I have a BA and an MA. How many substitute hours can I claim for these degrees?**

A: A bachelor’s degree is worth 75 substitute hours; an advanced degree is worth 100. However, these substitute hours are not cumulative, so you may apply only the value of the higher degree. In this case, that’s a maximum of 100 hours.

## Continuing Education

**Q: How do I know which classes and courses are eligible for BCPO CEUs?**

A: To determine whether a class/course is eligible, use this checklist: Is this class...

- at least 60 minutes long?
- a live class/course (whether in person, by phone, or online)

OR

- an online learning module or recorded teleclass/webinar that provides proof of attendance/completion?
- a class/course that provides skills and knowledge that allow you to better serve your current and potential clients?

If the class meets all three of these requirements, it is likely to be eligible.

Does the course content provide the potential to improve your clients’ situations? Course topics related to starting, building, growing or administering your own business — such as marketing, finding clients, choosing an organizing specialty, exploring different business models, and branding — are not eligible.

These are extremely important courses, and BCPO® highly recommends that you take them in order to improve your business building skills. However, BCPO® certification is for organizing and productivity, so, like all credentials that follow accreditation standards, the CEUs must be related

to the certification skill itself — organizing and productivity.

**Q: Where can I find classes that will allow me to earn eligible CEUs?**

A: Everywhere! For example, the National Association for Professional Organizers (NAPO) has online courses and an annual conference that may contribute to earning your CEUs. For more information, please visit NAPO University. While NAPO and other professional associations offer excellent options for CEU-eligible classes, we strongly encourage you to expand your horizons to also examine the wealth of other resources available — community colleges, university extension programs, other professional organizers, related professionals, online learning websites, and professional societies for related industries.

Base your search on the needs of your clients and the challenges they face. If a segment of your clientele has ADHD, you might look into CHADD (Children and Adults with ADHD/ADD) for conferences and classes at the national and chapter levels, or ADDClasses.com, which offers teleclasses on a wide variety of ADHD-related topics. Professional Organizers who work with seniors might research local hospitals and social service agencies for courses on understanding the physical and mental health impediments faced by older adults.

If you specialize in working with data and records, whether digitally or on paper, in offices, governments, libraries, schools or elsewhere, consult ARMA International (formerly the Association of Records Managers and Administrators) for education on topics related to strategic information and records management. Whatever your clients' needs may be, there are opportunities to learn new languages, new software, new techniques and new philosophies for supporting their advancement.

**Q: What are some examples of topics that I could look for in CEU-applicable courses?**

A: Topics may include, but are in no way limited to:

- assessments
- action plan development & implementation

- clients with special needs, including physical and mental health issues
- communication skills, instruction and training techniques
- downsizing, disposal regulations, green organizing
- ethical issues
- legal and liability issues
- follow-up and maintenance of systems and routines
- productivity and time management
- project management
- psychology, learning styles, personality types
- space design/planning, ergonomics, feng shui
- systems analysis
- technological tools for organizing and productivity
- transference, teaching or training fundamental elements and skills of organizing and productivity

**Q: Are all of the live sessions I take when I attend NAPO, ICD, or other industry conferences eligible for BCPO® CEUs?**

A: No. Just because a class or conference session is given by an organizing industry association does not necessarily mean that it is eligible. Any class, course, or conference session, no matter who presents it, must meet BCPO's criteria for CEUs in order to be eligible.

For a conference session to be eligible, the session must be at least 60 minutes long and the content must provide skills and/or knowledge enabling you to better serve your clients. Conference sessions on starting, building, growing or administration of your own business are not eligible.

**Q: How do I prove I attended a live class?**

A: Proofs of attendance may include any or all of the following: registration confirmation emails, course handouts and materials, transcripts, and certificates of attendance. Other proof of attendance will be considered.

**Q: What sort of proof of attendance/completion do I need for an online learning module or recorded teleclass?**

A: In addition to any of the above verification, a certificate or other document proving attendance/completion is required.

**Q: Can I earn the entire 250 substitute hours for certification, or 45 hours for recertification, with online courses?**

A: No. Non-live courses (e.g., online learning modules or recorded teleclasses/webinars providing proof of attendance/completion), are limited to one-third

of your total claimed CEUs. For example, a CPO® candidate claiming 250 CEUs as substitute hours can count only 83 non-live CEUs. A CPO® candidate claiming 60 CEUs as substitute hours can only count 20 non-live CEUs.

A recertifying CPO® needs at least 45 CEUs for recertification, up to 15 of which can be non-live courses. If more than 45 hours are submitted, then one third of the total hours may be for non-live courses.

**Q: Can I listen to recorded conference sessions or other cd's and count them as CEUs?**

A: No. The only recorded sessions that are eligible for CEUs are those that include a way of proving you have listened to and interacted with the entire session, such as recorded teleclasses from the ICD, which include a password to verify attendance. Recorded conference sessions do not offer a way of proving you have listened to the entire session, and also do not offer proof of attendance/completion.

## Deadlines & Fees

**A**pplications for the Computer-Based Testing (CBT) administration of the examination must be received by five business days prior to the last day of the testing window. Exam windows are the full months of February, June and October of each year.

<b>Application Fee</b>	<b>\$450</b>
------------------------	--------------

The Annual Maintenance Fee (AMF) is \$100 per year. The first payment is due upon passing the CPO® examination.

### Refunds and Cancellations

BCPO® reserves the right to cancel any examination at any time in the event of acts of nature, etc. impacting the ability to conduct the examination. In such cases, candidates will be contacted if an examination is cancelled, and BCPO® liability shall be limited to a full refund of fees paid. The candidate should assume the examination will proceed unless contacted.

If you fail to show up for your exam at the scheduled time, do not have the proper identification, or do not have your admission document, you will not be allowed to sit for your exam. You will be considered a “No-Show,” your exam fees will be forfeited and you will be required to re-register and pay all fees prior to sitting for the exam.

However, if you are unable to sit for your exam as scheduled, please note the following:

- If you cancel in **writing** 22 or more days prior to the exam, you can get a refund of your exam application fee MINUS A PROCESSING FEE. If you want to reschedule in lieu of receiving a refund, your original fee will be credited toward a future exam-taking and you will be charged a \$100 rescheduling fee.
- If you cancel (by **calling** IQT and following their instructions) between 5 and 21 days prior to the exam, no refunds are given. However, your exam application fee will be credited toward a future exam-taking, and you will have to pay a \$100 rescheduling fee.
- If you cancel (by **calling** IQT and following their instructions) with fewer than 5 days’ notice because of the allowed, documented special circumstances (jury duty, military service, death in the family, illness, medical emergency), **no refunds will be given.** However, your fee will be credited toward a future exam-taking, and you MAY have to pay the \$100 rescheduling fee.

If you experience any of the above, you must contact IQT (who handles schedule for SMT) at 866-773-1114 or [info@isoqualitytesting.com](mailto:info@isoqualitytesting.com) and provide proper documentation before being rescheduled to a new date. Rescheduling fees may still be required.

## Application

All applications must be submitted online at [www.NAPO.net](http://www.NAPO.net), located in the Certification Section of the site.

## Preparation Tips

**B**ased solely on anecdotal evidence, we have found that those who don't pass the exam do so for three different reasons:

- They had not mastered the content covered in the [Exam Content Outline](#).
- They were “out of practice” in taking timed standardized exams.
- They suffered from test anxiety.

To help you prepare for the exam, we highly recommend the following:

### Study the Exam Content Outline.

This tells you every topic you need to study and the relative value of each topic vs. the material as a whole. If you perceive a weakness in some of the content areas, study those areas in particular. If you have no idea what a topic is, that's a good sign to start your studies there.

### Read books and/or take courses to increase your knowledge.

No matter how many hours and years of experience you have, there is always room for more learning – especially in preparation for this exam. Learn as much as possible, but also realize that overkill won't help your brain. There is a list of [suggested resources](#) in this handbook, but you are **not required** to read all of them. Instead, perhaps choose the ones that will address any of your “challenge” areas in the Exam Content Outline.

### Form a study group.

We all have different learning styles. Some of us learn better through reading, some through listening, and others through interaction. Study groups can help with all three modalities. You can form a group within your NAPO chapter. Or, if you live far away from others, consider creating a virtual study group. Even if your colleagues aren't 100% sure they want to work toward earning their CPO<sup>®</sup>

credential, they will still gain a wealth of knowledge from participating.

Once you have your group together, you can divide up the content outline so that each person is “teaching” a topic, or each person in the group can read a book that supports a particular topic and you teach that topic to each other. Write a summary of the book you studied. Share and discuss this with your group. You gain knowledge from reading, plus you reinforce what you learn by teaching it to others. You can take it a step further by creating sample questions for each other.

### Take an exam prep course.

In following accreditation standards, BCPO<sup>®</sup> is not permitted to require you to take courses of its own creation, but we can give suggestions about how to prepare. If you haven't taken a standardized exam in many years and/or if you have test anxiety, consider taking an exam prep course such as NAPO's CPO<sup>®</sup> Exam Prep Course. Standardized exams are much tougher than the tests created by your teachers and professors back in your school days. Even professional organizers who've been in business for twenty years and who seemingly know everything might struggle because this is a standardized exam. Think of the SAT, ACT, CPA exams, teacher certification exams...they're tough multiple-choice assessments that must be completed within a short time frame. In the case of the CPO<sup>®</sup> exam, it's 125 multiple choice questions in two hours. An exam prep course will help get your brain into test-taking mode. You can take a test prep course shortly before you take the exam or several months beforehand to help you study more efficiently.

# Examination Content Outline

## I. Preliminary Communication (e.g., qualifying interview), 10%

- A. Discuss perceived goals and expectations
- B. Identify challenges and concerns
- C. Identify all individuals involved in the process
- D. Identify each individual's readiness and commitment to the process
- E. Communicate rates and policies
- F. Determine if a professional relationship should be established

## II. Preliminary Assessment, 25%

- A. Client behaviors, skills, and characteristics
  - 1. Habits and routines
  - 2. Perception of situation (i.e., what the client believes the problem to be)
  - 3. Personal preferences (e.g., aesthetics, paper vs. electronic, organic products)
  - 4. Current organizing skills (e.g., space, time, information, objects)
  - 5. Learning styles (e.g., visual, kinesthetic, auditory)
  - 6. Technological/Computer skills
  - 7. Physical considerations (e.g., injury, illness, limited mobility)
  - 8. Mental health considerations (e.g., ADHD, OCD, hoarding behaviors)
  - 9. Other factors (e.g., age, religion, and culture)

## B. Environment

- 1. Characteristics of physical space (e.g., square footage, power source, doors/windows)
- 2. Furniture and equipment
- 3. Organizational materials and supplies
- 4. Technology tools (e.g., operating system, software)

## C. Identify external factors (e.g., company policies, family dynamics, lease agreements)

## D. Available budget

## III. Project Plan Development, 20%

- A. Review assessment findings
- B. Determine scope
- C. Prioritize objectives
- D. Determine tasks
- E. Identify and recommend resources
  - 1. Recommend organizational tools and supplies (e.g., containers, labels, software)
  - 2. Recommend furniture and equipment
  - 3. Make referrals (e.g., other professionals, educational materials)
  - 4. Identify removal options (e.g., donation, disposal, selling)
- F. Estimate project timeline
- G. Estimate cost (e.g., consulting fees, supplies, vendors)
- H. Communicate and finalize project plan

**IV. Project Implementation, 30%**

- A. Teach, transfer and apply organizing fundamentals and methodologies
  - 1. Consolidate, sort and categorize
  - 2. Eliminate excess
  - 3. Contain
  - 4. Optimize use of space
  - 5. Promote decision making
  - 6. Consider function and usability
  - 7. Document process and work flow
  - 8. Prioritize
  - 9. Support Productivity and Time Management skills
- B. Apply communication skills to carry out plan (e.g., negotiate, clarify, influence)
- C. Address challenges and obstacles (e.g., procrastination, perfectionism, scope creep)
- D. Manage project (e.g., resources, budget, schedule, expectations)
- E. Evaluate client satisfaction (e.g., processes,

timeline, resources

**V. Follow Up and Maintenance, 8%**

- A. Recognize transference of skills
- B. Evaluate effectiveness of changes
- C. Evaluate sustainability of changes
- D. Make recommendations (e.g., processes, timeline, resources)

**VI. Legal and Ethical Responsibilities, 7%**

- A. Recognize BCPO's Code of Ethics
- B. Apply BCPO® Code of Ethics to practice
  - 1. Be cognizant of conflict of interest
  - 2. Confidentiality
  - 3. Fees and services
  - 4. Intellectual property, trademark, and copyright protection
  - 5. Accurate representation of skills

## Suggested Resources

Questions are developed from information gained through practical experience and pertain to a body of knowledge generic to the practice of professional organizing. You are encouraged to supplement your education and experience by reviewing other resources and finding information in areas in which you may consider yourself less skilled or experienced.

BCPO® does not intend that candidates purchase and read all of the materials listed in the Suggested Resources. The list may include more than one reference that covers a content area, but one such reference may be enough. The candidate may also have resources available that are not on the list but which will adequately cover the content.

In addition to a self-study reading program, there are other refresher activities in which you may participate and benefit. These include attending professional meetings and workshops, joining a study group, listening to tapes of presentations made at professional meetings, and taking academic or noncredit courses.

The BCPO® exam is a legally defensible and psychometrically sound standardized exam which is developed under the guidance of an accredited exam development company, SMT. If it's been more than a couple of years since you've taken a timed, standardized professional exam (e.g., architect, CPA, teacher certification, etc.), we highly recommend that you take an exam preparation course.

BCPO® does not endorse any particular text or author. It is not required that you read all of these books, nor does use of these books guarantee successful completion of the test. Subject matter experts reviewed the books and feel they are suitable resources for preparing for the exam.

### Author

BCPO®  
 Allen, David,  
 Baker, Sunny  
 Goldberg, Donna  
 Hobbs, Peter  
 Jasmine, Grace  
 Knight, Porter  
 Kolberg, Judith  
 Lehmkuhl, Dorothy & Lamping, Dolores Cotter  
 Mark, Teri  
 McCorry, K. J.  
 Morgenstern, Julie  
 Morgenstern, Julie  
 Pedersen, Sara  
 Roth, Eileen & Miles, Elizabeth  
 Silver, Susan  
 Smallin, Donna  
 Taylor, Harold  
 Tiani, Jackie  
 Waddill, Kathy  
 Walsh, Peter  
 Winston, Stephanie

### Title

Code of Ethics for Certified Professional Organizers  
 Getting Things Done  
 The Complete Idiot's Guide to Project Management  
 The Organized Student  
 Essential Managers: Project Management  
 Fabjob Guide to Become a Professional Organizer  
 Organized to Last  
 Conquering Chronic Disorganization  
 Organizing for the Creative Person  
 Organize Your Office: A Small Business Survival Guide to Managing Records  
 Organize Your Work Day In No Time  
 Organizing from the Inside Out  
 Time Management from the Inside Out  
 Learn to Organize  
 Organizing for Dummies  
 Organized to Be Your Best!  
 Organizing Plain and Simple  
 Making Time Work For You (*old and new editions*)  
 Organizing for a Living  
 The Organizing Sourcebook: Nine Strategies for Simplifying Your Life  
 It's All Too Much  
 Getting Organized (*2006 edition*)

There are numerous other resources that can be of value to your studies and your practice. We encourage you to not limit yourself to this list.

## Author

Glovinsky, Cindy  
 Hemphill, Barbara  
 Izsak, Barry  
 Kolberg, Judith  
 Nakone, Lanna  
 Noble, Dawn  
 Passoff, Michelle  
 Paul, Marilyn  
 Pedersen, Sara  
 Sgro, Val  
 Silber, Lee

## Title

Making Peace With the Things in Your Life  
 Taming the Paper Tiger at Work  
 Organize Your Garage in No Time  
 Getting Organized in the Era of Endless  
 Organizing for Your Brain Type  
 How to Start a Home-Based Professional Organizing Business  
 Lighten Up! Free Yourself from Clutter  
 It's Hard to Make a Difference When You Can't Find Your Keys  
 Born to Organize: Everything You Need to Know About a Career as a PO  
 Organize Your Family's Schedule in No Time  
 Organizing From the Right Side of the Brain

**B**elow is a list of helpful things to keep in mind as you prepare for and then sit for the examination:

- Try to avoid situations that would trigger emotions such as worry, anger, depression, and lack of confidence right before the test day. These emotions interfere with memory and are sometimes called “memory thieves.”
- Get a good night's sleep the night prior to the examination.
- Over-study a bit to build self-confidence and to remind yourself just how much you know, but don't study so much that you go to the examination site in a state of exhaustion.
- Avoid stimulants. Stimulants can make you so agitated that you may miss the point on some test items. Also, avoid tranquilizers, if your health condition permits. It is better to be a bit nervous before an examination than to be drowsy.
- Follow directions! If you read them too quickly, you may miss something important.
- Read each item very carefully. Don't jump to conclusions based upon a quick skimming of the wording.
- See if you can answer the item before looking at the four (4) response options.
- Never think you have immediately spotted the correct response. “Back into” the correct response by first eliminating the incorrect choices.
- Answer each item - guess if necessary. Your score is based upon the number of items you respond to correctly. There is no penalty for guessing.
- If you are not sure of an answer, look for clues in the item and even in the choices. If you are able to eliminate some options, your chances of being correct if guessing are improved.
- Use your time wisely. Take the items in order, but don't waste time worrying about those you cannot answer with certainty. Guess intelligently, select an answer, and if you have time at the end return for a second look. By then, you may have remembered something, or had a memory “jogger.”
- Read the pages of this handbook and the site carefully. It is important that you understand administrative details about examination admission, examination rules, registration procedures, identification, score reporting, etc. Being familiar with these details will reduce your anxiety.

# *Test Site Rules and Regulations*

## **General Information**

Due to limited parking facilities at some sites, please allow ample time to park and reach the testing area.

No food or drinks are allowed in the examination room.

## **Examination Admittance**

In order to be admitted to the examination, you must bring your admission documents and one government-issued photo identification. The only acceptable forms of identification are a driver's license, government-issued identification card, or passport. No other written forms of identification will be accepted. You will not be admitted without proper identification.

## **Examination Security**

Failure to follow oral and written instructions at the examination site will result in your application being voided and forfeiture of your registration fee. Conduct that results in a violation of security or disrupts the administration of the examination could result in the confiscation of your test and dismissal from the examination. In addition, your examination will be considered void and will not be scored. Examples of misconduct include, but are not limited to, the following:

- writing on anything other than designated examination materials,
- writing after time is called,
- looking at another candidate's examination materials,
- talking with other candidates at any time during the examination period, and
- failing to turn in all examination materials before leaving the testing room.

You must not discuss or share reference materials or any other examination information with any candidate during the entire examination period or after the examination. You are particularly cautioned not to do so after you have completed the examination and checked out of the test room, as other candidates in the area might be taking a restroom break and still not have completed the examination.

You may not attend the examination only to review or audit test materials. You may not copy any portion of the examination for any reason. No examination materials may leave the test room under any circumstances and all examination materials must be turned in and accounted for before leaving the testing room.

No unauthorized persons will be admitted into the testing area.

Please be further advised that all examination content is strictly confidential. You may only communicate about the test, or questions on the test, using the appropriate comment forms provided by the examination staff at the test site. At no other time, before, during or after the examination, may you communicate orally, electronically or in writing with any person or entity about the content of the examination or individual examination questions.

## **Reference Material**

Candidates writing on anything other than examination materials distributed by the proctors will be in violation of the security policies above. Reference materials are not allowed in the testing room. Candidates are asked to bring as few personal and other items as possible to the testing area.

## **Examination Protocol**

While the site climate is controlled to the extent possible, be prepared for either warm or cool temperatures at the testing center.

Cellular phones and other electronic devices, unless medically necessary, are prohibited in the testing area.

The use of headphones inside the testing area is prohibited. However, earplugs for sound suppression are allowed.

Electrical outlets will not be available for any reason.

No smoking or use of tobacco will be allowed inside the testing area.

You must vacate the testing area after you have completed the examination.

## Scoring & Reporting

**T**he BCPO® examination consists of 125 multiple choice questions with four (4) choices per question. Twenty-five of these questions are included for research purposes only and will not be included in your score. The research questions are not identified; therefore, candidates should answer all questions to the best of their ability. Examination results will be based only on the 100 scored questions on the examination. You have two hours to take the exam.

There are multiple versions of the examination. A weighted review process is in place to ensure that each candidate has an equal opportunity to pass the examination.

The passing grade is a scaled (weighted) score and not merely a percent of correct answers out of the 100 non-research questions. Candidates are not required to have a passing score in each of [the six domains of the examination](#) in order to achieve a passing score.

The BCPO® examination is a pass/fail examination and no actual scores will be reported to candidates. However, candidates who do not pass will be provided with an analysis of their performance, by content area, to assist in further study.

In most cases, you will receive your preliminary pass/fail result from the proctor at the testing center once you have completed your exam. Even with a pass result, the CPO® designation is not official until you receive your CPO® notification and certificate.

Notifications results will normally be mailed, via U.S. first class mail, within seven days of the end of the testing

window. However, when a new version of the examination is released, a comprehensive statistical and psychometric analysis of the score data is conducted prior to the release of scores. A minimum number of candidates must have taken the examination for the analysis to be conducted. Accordingly, depending upon the schedule of test dates for a given cycle, there may be occasions when scores are delayed for up to six weeks in order to complete this critical process.

Results WILL NOT be released over the phone. In order to receive your results, your email and mailing address must be current and any change must be submitted to SMT in writing.

### Re-examination

There is no limit to the number of times unsuccessful candidates may take the examination, provided that all the eligibility requirements in effect at the time of application for re-examination have been met. To apply for re-examination, candidates must complete all required application forms and pay the appropriate examination fees, each time.

### Confidentiality statement

BCPO® strongly believes in protecting the identity of examination candidates. The BCPO® Board of Directors, National Association of Professional Organizers Board of Directors and NAPO Headquarters staff members are unaware of the number of times a candidate has taken the exam or their score. All identities are kept confidential until there is a passing score.

## Examination Appeals

It is the policy of BCPO® that each candidate for certification shall have the ability to challenge a failing score if a candidate feels that there was an error in electronic scoring. If a candidate wishes to challenge a failing score, he or she can request a “hand verification” in writing from SMT. The candidate must file the challenge within 30 days from the date of the grade notice. SMT will then hand verify the candidate’s responses against the answer key and the mathematical calculation of the scaled score. The fee for processing this challenge is \$25, payable to SMT at the time of the submission of the challenge. No challenge will be processed without the fee.

If the candidate is not satisfied with the response from SMT, he or she may submit a written statement of exactly what he or she is challenging and the supporting rationale for the challenge. This will be submitted to SMT and they will forward it to the BCPO® Program Development Committee for a finding of merit or no merit. The decision of the BCPO® Program Development Committee shall be final.

BCPO® also provides a process of appeal for candidates who are denied entrance to the examination, or feel that some other testing condition prevented them from an appropriate opportunity. Candidates who are denied entrance to the examination, or feel there is some other basis for appeal, must submit a detailed and comprehensive explanation of the rationale for the appeal in writing to BCPO® staff, no later than seven (7) days after the date of the score notification letter. The fee for processing this appeal is \$25, payable to BCPO® at the time of appeal. No appeals will be processed without the fee.

The BCPO® Program Development Committee will review the appeal documentation and will notify the candidate of its decision within 90 days. The decision of the BCPO® Program Development Committee is final. If it is determined that the candidate was wrongly denied admission to the examination, the candidate will be permitted to immediately make an appointment to take the examination without paying an additional fee.

## Application Review and Audit

### Application Review

Each application will be reviewed by the BCPO® testing service (SMT) to ensure the eligibility of each applicant. Those applicants who do not qualify will be given the opportunity to provide additional documentation/information. However, in no circumstances shall the published application deadline be extended. Therefore it is important to submit the completed application as early as possible.

Based on the information provided, if a candidate is deemed ineligible to sit for the BCPO® Certification Examination, they will receive e-mail notification. An application may also be rejected if it is incomplete, illegible, or received after the application deadline.

### Application Audit

BCPO® is charged with the responsibility for safeguarding the integrity of the CPO® designation. Part of this responsibility entails ensuring that candidates who apply

for the certification examination do, in fact, meet the eligibility requirements. Accordingly, it is the policy of the BCPO® to mandate an audit of a percentage of candidate examination applications, by verifying the assertions made by the candidates about their eligibility to sit for the examination. These application audits are conducted by an audit committee comprised of CPOs on behalf of BCPO®, to ensure a non-biased and objective review of the candidate’s eligibility. The audits will take place approximately three (3) weeks after the close of the examination window.

Should you be randomly selected (via a computerized random number generator program) for an application audit, you will receive a notice to this effect via your email address of record, along with a CPO® Candidate Consent Form which MUST be executed and returned immediately upon receipt of the notice of audit. It is strongly suggested that you collect, organize and have available this supporting documentation as you complete your application, so that it can be readily submitted should your application be randomly selected for audit.

## *When You Can Begin Using the CPO® Designation and Logo*

**I**n most cases, you will receive your preliminary pass/fail result from the proctor at the testing center once you have completed your exam. Even with a pass result, the CPO® designation is not official until you receive your CPO® notification and certificate.

Notifications results will normally be mailed, via U.S. first class mail, within seven days of the end of the testing window. However, when a new version of the examination is released, a comprehensive statistical and psychometric analysis of the score data is conducted prior to the release of scores. A minimum number of candidates must have taken the examination for the analysis to be conducted. Accordingly, depending upon the schedule of test dates for a given cycle, there may be occasions when scores are delayed for up to six weeks in order to complete this critical process.

### **CPO® Logo Usage Guidelines**

- Logo may be used upon receiving formal notification from Board of Certification for Professional Organizers® that you have successfully completed the certification requirements.
- Logo may be used on marketing materials such as; business cards, letterhead, website, social media and resume.
- The CPO's name must appear on any materials where the CPO® logo is used. The logo cannot appear larger or more prominent than the CPO's name, product or service name, trademark or service mark, logo or trade or company name.
- The CPO® logo may not be used in any manner that expresses or might imply BCPO's affiliation, sponsorship, endorsement, certification or approval, other than as set forth by the BCPO® Application Agreement.
- The CPO® logo, or any elements thereof, may not be included in your trade or business name, domain name, product or service name, logo, trade dress, design, slogan or other trademarks. With approval from BCPO®, non-commercial websites utilizing the CPO® logo within the domain name for purposes of education or promotion of the mark are permitted.
- The CPO® logo may not be altered. It may not be combined or layered with other logos, text or images. Colors and shape of the CPO® logo may not be changed. The CPO® logo may not be hyperlinked to audio files.
- The CPO® logo may not be used as a design feature on any of your product or service materials.
- The CPO® logo may not be imitated in any manner in your materials.
- The CPO® logo and phrase "Certified Professional Organizer®" shall always be accompanied by ® except where prohibited by size constraints (e.g., business cards).

## Annual Maintenance Fees

**T**he Annual Maintenance Fee (AMF) is \$100 per year. The first payment is due upon passing the CPO® examination in order to officially become a CPO®.

CPO's will receive an invoice prior to their anniversary date each year. Important notices and reminders for recertification and annual maintenance fee (AMF) payments are sent by email. The CPO® is responsible for keeping a current email address on file. **Any invoices**

**unpaid or rules not followed due to failure to keep one's address current ARE the responsibility of the CPO®.**

CPOs are not able to recertify unless their AMF payments are current. Recertification notices are sent 60 days prior to the recertification date. Included with the notice is a reminder that the AMF is due for the new certification term.

## Recertification Eligibility

**A**fter initial certification, recertification is required every three (3) years. You may recertify by completing one of the following sets of steps prior to your recertification date.

- Confirm that you have entered 45 or more eligible CEUs in the CPO®-only area on the BCPO® web site.
- Submit an [application for recertification](#), including asserting to continued practice as a Professional Organizer and abiding by the BCPO® Code of Ethics.

OR

- Submit an [application for recertification](#), including asserting to continued practice as a Professional Organizer and abiding by the BCPO® Code of Ethics.
- Schedule and pass the examination.

If a CPO® chooses to recertify by examination and fails, at the end of the then-current term, his/her credential expires,

and he/she may no longer use the CPO® designation. Upon receiving a failing score, the CPO® is not eligible to re-take the examination for recertification.

If the CPO® meets the current eligibility requirements for initial certification, including earning 1500 work hours in the three years prior to applying to sit for the exam, he or she would be eligible to submit an application to take the current examination as a new candidate. A new candidate, upon receiving a failing score, is eligible to re-take the examination.

You will not be able to recertify if you have not kept your Annual Maintenance Fee (AMF) current. When you receive notice 60 days prior to your Recertification date, you will also be reminded that the AMF will be due for the first year of your new term.

Important notices and reminders for Recertification and your Annual Maintenance Fee (AMF) payments are sent by email. You are responsible for keeping a current email address on file, using the "Edit My Info" selection from the CPO®-only menu on this website.

## CEU Eligibility

One way to maintain your CPO® credential is through continuing education, but not all courses may qualify toward your Continuing Education Unit (CEU) requirement. CEU-eligible courses can come from any educational provider, and can be on any subject related to the type of organizing or productivity consulting in which you engage. Because your organizing or productivity specialty may vary from your peers, eligible classes may be different for everyone.

### CEU Requirements

Certified Professional Organizers who wish to recertify via CEUs (instead of re-taking the exam) must complete at least 45 CEUs. For complete details, see the Recertification FAQ in the next section.

### What's Eligible?

To determine whether a class/course qualifies as a CEU, it must be:

- at least 60 minutes long.
- a live class/course (whether in person, by phone, or online); OR  
an online learning module or recorded teleclass/webinar that provides proof of attendance/completion.

- a class/course that improves your organizing and productivity skills and knowledge so you can better serve your current and potential clients.

If the course allows you to increase your own organizing or productivity skills or your ability to teach or transfer knowledge and/or skills to the client, you have chosen an eligible course.

### What's Not Eligible for CEU Credit

- Course topics related to starting, building, growing or administering your own business — such as marketing, finding clients, choosing an organizing specialty, exploring different business models, and branding
- Recorded conference sessions or other recorded courses/classes that don't provide proof of attendance

BCPO® highly recommends that you take business-building courses in order to improve those skills. However, BCPO® certification focuses on organizing, so, like all credentials that follow accreditation standards, the CEUs must be related to the certification skill itself — organizing and productivity.

## Recertification Audits

BCPO® is required to audit a certain percentage of qualified candidates for recertification. Candidates are randomly selected for audit. In the event of an audit, the candidate must be prepared to provide documentation to support their eligibility for recertification.

## Notification of Recertification Application Results

Upon receipt of the recertification application, payment of all Annual Maintenance Fees, and documentation of continuing education requirements as specified by BCPO®, a new CPO® certificate and ID card will be mailed to the CPO®.

## CEU Eligibility

### Q: How often do I need to recertify?

A: Recertification is required every three (3) years.

If you sit for the exam any time during the month of:	You must complete your re-certification criteria by:
June 2016	6/30/2019
October 2016	10/31/2019
February 2017	2/28/2020
June 2017	6/30/2020

### Q: How do I recertify?

A: There are two methods to recertify. For both, the CPO® must assert to continuing practice as a professional organizer as a part of completing the online [recertification application](#), and have Annual Maintenance Fees (AMF) paid in full. In addition, the recertifying CPO® must either (a) earn at least 45 eligible continuing education units (CEUs) during the 3-year certification term or (b) retake and pass the CPO® examination.

### Q: If I choose to recertify by exam instead of earning CEUs, what happens if I don't pass? May I take the exam again before my certification expires?

A: The BCPO® encourages recertification through continuing education to ensure that a CPO® stays current with professional knowledge. When a certificant attempts to recertify by exam and fails, it signifies that the individual no longer possesses the minimum knowledge required to maintain certification. If you choose to recertify by examination and fail, your certification expires with the expiration of your current

certification period. Although you cannot sit for an exam again to recertify, you may apply to sit for the exam as a new candidate, as long as you meet all of the [eligibility requirements](#) for initial certification, including earning 1500 work hours in the three years prior to applying to sitting for the examination.

### Q: What does it cost to recertify?

A: There is no fee for recertification; however, your Annual Maintenance Fees (AMF) must be paid, in full, prior to your anniversary date each year. Each CPO® will automatically receive an AMF invoice 2 months prior to that anniversary. If you choose to recertify by taking the examination (rather than obtaining and recording CEUs) the standard application fees will apply. The application fee is in addition to, not in place of, the Annual Maintenance Fees prior to applying to sit for the examination.

### Q: How much is the Annual Maintenance Fee?

A: The AMF is currently \$100 per year.

### Q: Can't I pay all my fees at the end of the 3 years when I recertify?

A: Your first AMF is due upon receipt of your certification packet; the following two AMFs will be due prior to your subsequent anniversary dates. If you prefer the convenience of one payment, you may pay the AMF for all 3 years at the start of your first year, but you cannot defer payment until the end of your certification term. If your AMF is not paid in full by 30 days after the due date, your CPO® status will be considered inactive and your name and any web links will be removed from the CPO® directory. If your AMF is not paid in full by 60 days after the due date, your CPO® status will be revoked.

### Q: Can my recertification be audited?

A: Yes. As with initial certification, a set percentage of all recertification applications may be randomly subject to audit. If selected, you may be notified of the audit,

and a summary of your CEUs will be submitted to the Audit Committee for review. If the committee has any questions regarding the applicability of the content to your practice, a representative will contact you for additional explanation or information. If the Audit Committee determines that a CPO® has not obtained the requisite 45 eligible CEUs, CPO® status will be revoked. CPO® status may be regained by reapplying as a new candidate after meeting the [eligibility requirements](#) in place at that time and passing the examination.

## Questions About CEUs

**Q: Are the guidelines for continuing education courses the same for recertification as they are for initial certification?**

A: Yes. The criteria used to determine the eligibility of courses, as spelled out at the [CEU FAQ](#), is the same: the course must contribute to your ability as an organizing practitioner to better serve your client. If the course allows you to increase your own skills or your ability to teach, transfer or demonstrate knowledge and/or skills to the client, you have chosen an eligible course.

The basic requirement for a CEU eligible class is that it is:

- at least 60 minutes long
- a live class/course (whether in person, by phone, or online)

OR

an online learning module or recorded teleclass/webinar that provides proof of attendance/completion

- a class/course that provides skills and knowledge that allow you to better serve your current and potential clients

A CPO® must obtain a minimum of 45 CEUs prior to recertification, up to 15 of which can be “non-live” courses (e.g., online learning modules or recorded

teleclasses/webinars providing proof of attendance/completion).

**Q: Can I listen to recorded conference sessions or other CD’s and count them as CEUs?**

A: No. The only recorded sessions that are eligible for CEUs are those that include a way of proving you have listened to and interacted with the entire session, such as recorded teleclasses from the ICD, which include a password to verify attendance. Recorded conference sessions do not offer a way of proving you have listened to the entire session, and also do not offer proof of attendance/completion.

**Q: How can I track my continuing education credits?**

A: You must track your CEUs in the professional development section of the NAPO website. Once you’ve logged in, you can enter new CEUs, or view and/or edit previously entered CEUs. We recommend that you enter your CEUs as soon as you earn them to keep your records up-to-date.

**Q: What if I make a mistake while I’m recording my continuing education credits on the BCPO® website?**

A: You will have the ability to preview and, if necessary, revise your CEU data before your entry is saved. Additionally, if you later find that you’ve made an error, you may edit any entry from the Professional Development section by clicking the edit icon associated with the course title.

**Q: What if I mistakenly enter the same class twice?**

A: You may delete any CEU by clicking on the trash can icon associated with the course title.

**Q: Do I need to earn 15 CEUs each year or can I earn them all at once?**

A: You can earn CEUs at any time during the 3 year period, as long as you have accumulated at least 45 CEUs by your recertification date.

# Certification Policies

**A** CPO® has made a professional, educational and financial investment in BCPO® certification. In order to maintain the integrity of BCPO® certification, as well as the respect associated with the CPO® designation, BCPO® is committed to established policies designed to protect that investment.

## Accreditation Standards

BCPO's certification program (eligibility requirements, policies and procedures, exam development and administration, certification maintenance, etc.) abides by the accreditation standards set forth by the National Commission for Certifying Agencies. For details about the rules that must be adhered to, please review the accreditation standards in the [NCCA Guidelines Handbook](#).

## Non-Discrimination Policy

BCPO® does not discriminate among applicants on the basis of age, gender, race, religion, national origin, disability, sexual orientation or marital status.

## Request for Special Testing Accommodations

### Disabilities

Board of Certification for Professional Organizers® provides special accommodations in accordance with the [Americans with Disabilities Act of 1991](#). If a disability prevents you from taking the examination under normal conditions, you may request special accommodations. You must submit along with your application form a written request for special accommodations that explains the nature of the disability and the type of accommodation you feel is appropriate. In addition, you must provide supporting documentation of the diagnosis from a licensed health care professional.

## English as a Second Language

The CPO® examination is offered in English only. If English is not your primary language, BCPO® recommends (but does not require) that candidates sit for the TOEFL® (Test of English as a Foreign Language) examination prior to sitting for the CPO® examination. Your scores on the TOEFL will provide a useful gauge for you to ascertain whether reading and comprehending English will present problems for you on the CPO® examination.

## Religious Beliefs

Should a candidate desire to sit for an examination in which the date conflicts with religious beliefs in any way, BCPO® recommends the candidate check the list of the [examination dates](#) for an alternate date or an alternate location with an examination scheduled on a conforming date. If an alternate date or location is not available, the candidate should notify [registrations@isoqualitytesting.com](mailto:registrations@isoqualitytesting.com) immediately.

## Contact Information Changes

CPO®s and CPO® candidates are required to keep BCPO® informed of updates to their contact information as a requirement of certification. CPO®s must update their directory information within their profile on [www.napo.net](http://www.napo.net). Important notices and reminders for Recertification and your Annual Maintenance Fee (AMF) payments are sent by email. You are responsible for keeping a current email address on file. Any invoices unpaid or rules not followed due to failure to keep one's address current are the responsibility of the CPO®.

## Privacy Policies

The Board of Certification for Professional Organizers (BCPO®) has created these Privacy Policies in order to demonstrate our firm commitment to privacy. The following discloses our information gathering and dissemination practices.

BCPO® reserves the right to change these policies at any time by notifying users of the existence of a new privacy statement.

## Collection of Data

BCPO® does not collect personal data about individuals except when such individuals specifically provide such information on a voluntary basis. Users should also be aware that non-personal information and data may be automatically collected through the standard operation of NAPO®'s Internet servers or through the use of "cookies."

## Purpose of Processing

The personal data collected is used by BCPO® and third parties acting on its behalf for customer administration and marketing-related purposes. If you do not wish to receive any direct marketing from BCPO®, please inform us using the instructions below.

In some cases, such as to apply for the CPO® examination, BCPO® does require the collection of home address and telephone numbers. It has been our experience that residential contact information is more constant than business contact information because of the mobility of professionals through their careers. This information is only used to contact individuals about upcoming examinations and related educational opportunities.

BCPO® will occasionally perform statistical analyses on our website of user behavior and characteristics in order to measure interest in and use of the various areas of the site. BCPO® will provide only aggregated data from analyses to affiliated third parties. BCPO® also uses your IP address to help diagnose problems with our server and to administer our web site.

As BCPO® is an organization based in the United States, your personal data will be collected and processed in the United States by BCPO® and third parties acting on its behalf in accordance with and for the purposes set out in these Privacy Policies. If you do not wish your personal data to be handled in this way, please inform us using the instructions below.

## Your Rights

BCPO® is a certification organization and maintains information on those who possess its certifications or have expressed an interest in them. If you would like to see the information BCPO® retains about you or would like to be removed from the BCPO® database, please write to us at the address below. Be aware that if you possess any BCPO® certification and request to be removed from its

database, you will correspondingly lose your certification. In those cases when you want BCPO® to provide a copy of the information held on you, BCPO® may require the payment of an administration fee of \$15. Additionally and upon your written request, BCPO® will update/correct personal information previously submitted which you believe to be inaccurate. Requests regarding your personal information may be sent to:

**BCPO®**  
**1120 Route 73, Suite 200**  
**Mount Laurel, NJ 08054**  
[Info@CertifiedProfessionalOrganizers.org](mailto:Info@CertifiedProfessionalOrganizers.org)

## Opt-Out

BCPO® must maintain contact information on all certificants to communicate relational or transactional information. BCPO® also sends promotional material promoting conferences, education opportunities, or other offerings. From time to time, BCPO® collaborates with other organizations and companies to promote other programs that may be of interest to professional organizers and BCPO® certificants. In such cases, BCPO® does not provide these organizations with any mailing information or otherwise disclose any contact information but distributes the organization's information on its behalf to those who have elected to receive such information. If, at any time, you do not wish to receive marketing material, every marketing e-mail will include an opt-out link at the bottom, or you may notify BCPO® in writing at the address below. This does not include opting-out of BCPO® (meetings, newsletters, CEU notices) or transactional notices (called "official" communications.)

## Third Parties

Occasionally, BCPO® out-sources administration and other functions to contractors. In such cases, BCPO® may provide these third parties with contact information for the sole purpose of performing BCPO®-sanctioned tasks under the supervision of NAPO® employees. These contractual relationships specifically address the manner in which they may use contact information and that they may not copy or disseminate that information or use it for any purpose other than that specified in the contract. Additionally, upon termination of the contract, they must return all information to BCPO® and destroy any copies that they might possess.

## BCPO® Public Directory

As a service to the general public and BCPO® certificants, BCPO® publishes, on the public side of its web site, a public directory listing of certificate holders. Listing in this directory is entirely voluntary. Those who elect to be listed should be aware that when they voluntarily disclose personally identifiable information (e.g., name, email address) on the CPO® Directory, such information, along with any substantive information disclosed in the Directory, can be collected and correlated and used by third parties and may result in unsolicited messages from other posters or third parties. Such activities are beyond the control of BCPO®.

## URL Links

The NAPO® website contains links to other sites. NAPO® and BCPO® are not responsible for any actions or policies of such third parties. Users should check the applicable privacy policy of such a party when providing personally

identifiable information. In any event, users should be aware that when they voluntarily disclose personal data (e.g., user name, email address) on the CPO® Directory, that such information, along with any substantive information disclosed in the Directory, can be collected and correlated and used by third parties and may result in unsolicited messages from other posters or third parties. Such activities are beyond the control of BCPO®.

## CPO® Lists for Employers

Periodically, BCPO® is asked by an employer to verify that those CPO®s who are employed by their organization hold BCPO® credentials. To that end, we provide names of those CPO®s who list the requester as their employer. No information, other than name, is revealed, and it is provided only to the employer upon written request. If you are a CPO® and do not wish to be identified as such to your employer, do not list your employer in your contact information, as this is the information used to identify you for inclusion to such a list.

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- An electronic or physical signature of the person authorized to act on behalf of the owner of the copyright interest;

- A description of the copyrighted work that you claim has been infringed;
- A description of where the material that you claim is infringing is located on the Site;
- Your address, telephone number, and e-mail address;
- A statement by you that you have a good faith belief that the disputed use is not authorized by the copyright owner, its agent, or the law; and
- A statement by you, made under penalty of perjury, that the above information in your Notice is accurate and that you are the copyright owner or authorized to act on the copyright owner's behalf.

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You agree to indemnify, defend and hold NAPO® and our affiliates, partners, officers, employees and agents harmless from any liability, loss, claim and expense, including reasonable attorneys' fees, arising directly or indirectly from your breach of this Agreement or your use of the Site.

## Disclaimer and Limits of Liability

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We are not liable for any indirect, special, incidental or consequential damages (including damages for loss of business, loss of profits, litigation, or the like), whether based on breach of contract, breach of warranty, tort (including negligence), product liability or otherwise, even if advised of the possibility of such damages. The negation of damages set forth above is a fundamental element of the basis of the bargain between us and you. This site and the information would not be provided without such limitations. No advice or information, whether oral or written, obtained by you from us through the site shall create any warranty, representation or guarantee not expressly stated in this agreement. Some jurisdictions do not allow the exclusion or limitation of incidental or consequential damages, so the above limitation and exclusion may not apply to you.

## Privacy Policies

Our Privacy Policies, as they may change from time to time, are a part of this Agreement.

## Links to Other Websites

The site contains links to other websites. We are not responsible for the content, accuracy or opinions expressed in such websites, and such websites are not investigated, monitored or checked for accuracy or completeness by us. Inclusion of any linked websites on our website does not imply approval or endorsement of the linked website by us. If you decide to leave our website and access these third-party websites, you do so at your own risk.

## Information and Press Releases

The website contains information and press releases about us. While this information was believed to be accurate as of the date prepared, we disclaim any duty or obligation to update this information or any press releases. Information about companies other than ours contained in the press release or otherwise, should not be relied upon as being provided or endorsed by us.

## Miscellaneous

This website (excluding linked sites) is controlled by NAPO®, with offices within the state of New Jersey, United States of America. By accessing this website, you agree that the statutes and laws of the state of Florida, without regard to its conflicts of laws principles, will apply to all matters relating to the use of this website and that any disputes arising hereunder will be decided in the courts of the State of Florida, including the federal courts therein. You expressly submit to the exclusive jurisdiction of said courts, consent to extraterritorial service of process and hereby waive any jurisdictional or venue defenses otherwise available to you. Those who choose to access

this site from other locations do so on their own initiative and are responsible for compliance with local laws, if and to the extent local laws are applicable. The language in this Agreement shall be interpreted in accordance with its fair meaning and not strictly for or against either party. Should any part of this Agreement be held invalid or unenforceable, that portion shall be construed consistent with applicable law and the remaining portions shall remain in full force and effect. To the extent that anything in or associated with the site is in conflict or inconsistent with this Agreement, this Agreement shall take precedence. Our failure to enforce any provision of this Agreement shall not be deemed a waiver of such provision nor of the right to enforce such provision.

# Ethics Complaint Procedure

## PREAMBLE

The program of certification for professional organizers exists to foster the development and growth of organizing professionals, to promote high ethical standards and practices in the professional organizing industry, and to establish and maintain public confidence in the integrity and professionalism of organizing professionals, thereby protecting the public. The Code of Ethics for Certified Professional Organizers (“BCPO® Code of Ethics”) sets forth the ethical principles to which all Certified Professional Organizers (“CPOs”) have subscribed. CPOs who violate the BCPO® Code of Ethics or commit other acts of professional misconduct defined herein are subject to prescribed disciplinary procedures and sanctions set forth in this document.

## ARTICLE I

### PURPOSE AND FUNCTION

**1.01 Purpose.** The disciplinary process set forth in this Ethics Complaint Procedure provides for an objective review of a Certified Professional Organizer’s compliance with the BCPO® Code of Ethics, including a CPO’s eligibility to retain said certification. Any Certified Professional Organizer® engaging in acts found to be in violation of the Code of Ethics or otherwise to constitute professional misconduct hereunder is subject to sanction under Article V-VII hereof.

**1.02 Function.** The function of this Ethics Complaint Procedure is as much evaluative as it is punitive. When a complaint is filed under Article V hereof alleging that a Certified Professional Organizer® has been involved in unethical conduct or other professional misconduct, the disciplinary process set forth in this Ethics Complaint Procedure will be invoked.

## ARTICLE II

### AUTHORITY

**2.01 Board of Directors.** The Board of Directors of the Board of Certification for Professional Organizers (“BCPO®”) has the authority to impose sanctions set forth in Article VII hereof and to act upon applications for reinstatement of certification status.

**2.02 Ethics Complaint Committee.** The Ethics Complaint Committee, a subcommittee of the Professional Practices Committee of the BCPO® shall be appointed by the Chair(s) of the Professional Practices Committee and is be vested with the authority to investigate alleged violations of the BCPO® Code of Ethics or other professional misconduct and to recommend action to the Board of Directors.

**2.03 Conflict of Interest.** If a member of the Ethics Complaint Committee shall, with respect to any matter before the Committee, be considered by the Committee to have a conflict of interest with respect to such matter,

such member shall be excluded from participation therein by the Committee. As deemed appropriate, the Chair has the authority to appoint temporary Committee members to substitute for disqualified Committee members. In the event that the Chair of the Committee has a conflict of interest with respect to a matter before the Committee, the remaining members of the Committee shall elect from among themselves a person to serve in the capacity of Chair with respect to such matter.

## ARTICLE III

### GROUNDS FOR DISCIPLINE

**3.01 Acts or Omissions.** Professional misconduct by a Certified Professional Organizer<sup>®</sup>, as defined below, shall constitute grounds for discipline, whether or not the act or omission occurred in the course of a client relationship:

(a) Any act or omission which violates the Ethical Principles of the BCPO<sup>®</sup> Code of Ethics.

(b) Any act or omission to obtain or to assist another in obtaining certification or recertification as a Certified Professional Organizer<sup>®</sup> by fraud, misrepresentation or deception.

(c) Any act or omission in responding to a request from the Ethics Complaint Committee that, in the opinion of the Committee, obstructs the Committee's performance of its duties.

(d) Any conviction of a felony or crime of moral turpitude or the equivalent of either under the criminal law applicable to a Certified Professional Organizer<sup>®</sup>.

## ARTICLE IV

### OBLIGATIONS TO REPORT PROFESSIONAL MISCONDUCT

**4.01 Reporting of Violations.** A Certified Professional Organizer<sup>®</sup> having knowledge of an act or omission by another Certified Professional Organizer<sup>®</sup> which violates the BCPO<sup>®</sup> Code of Ethics or otherwise constitutes professional misconduct as defined in Section 3.01 hereof, has the obligation to report the matter by filing a complaint under Article V hereof.

**4.02 Cooperation with Investigation.** It is the obligation of any Certified Professional Organizer<sup>®</sup> to

cooperate fully in the investigation of alleged professional misconduct.

## ARTICLE V

### COMPLAINTS OF PROFESSIONAL MISCONDUCT

**5.01 Complaint of Professional Misconduct.** A complaint of professional misconduct by a Certified Professional Organizer<sup>®</sup> must be signed and notarized, accompanied by substantiating documentary evidence, and submitted in writing to the Ethics Complaint Committee. A complaint may only be submitted once and may not be re-filed. The complaint must involve conduct which occurred within six (6) months of the date of the complaint. The complaint must include a detailed description of the nature of the alleged professional misconduct, as well as all pertinent facts and circumstances. The proceedings as a whole shall be treated confidentially, except to the extent required to complete the investigation, and except as provided herein in the event that certain disciplinary sanctions are imposed by the Board of Directors.

**5.02 Initial Determination.** Based upon the complaint and accompanying documents, the Ethics Complaint Committee will determine whether sufficient evidence exists to proceed with an investigation. If the Committee determines that insufficient evidence exists, the complaint shall be dismissed; the complainant shall be notified in writing of the dismissal. If the Committee determines that sufficient evidence does exist to initiate an investigation, it shall proceed as described below.

**5.03 Formal Investigation.** The Chair of the Ethics Complaint Committee shall inform the respondent in writing, by certified mail addressed to the last known address of the respondent, that a complaint of professional misconduct has been filed and that the Committee has determined to initiate a formal investigation of the matter. The Committee shall provide a copy of the complaint and all accompanying supporting documentation and evidence to the respondent. The identity of the complainant shall be revealed. The respondent shall have thirty (30) days from the date of receipt of the notification letter to prepare and submit a response in writing, along with whatever affidavits and documentary evidence the respondent feels support the response. The Committee shall have the right to seek additional information regarding the matter from the complainant, the respondent and/or relevant third parties. In conducting its investigation and evaluating all evidence, the Ethics Complaint Committee shall presume

at the outset of its investigation that the respondent acted ethically and shall determine that an act of professional misconduct has occurred only if it finds clear and convincing evidence of such misconduct.

#### **5.04 Determination and Recommendation.**

The Ethics Complaint Committee shall evaluate all documentation pertaining to the matter and render one of three (3) decisions within ninety (90) days of receiving all relevant evidence:

- a. There is insufficient evidence to make a determination.
- b. The complaint is substantiated.
- c. The complaint is not substantiated.

In the case of a decision under a. or c. above, the complaint shall be dismissed, and both the complainant and the respondent shall be so notified by the Committee Chair in writing. If the Ethics Complaint Committee finds clear and convincing evidence of professional misconduct, it shall issue a written decision setting forth the basis for its decision and recommending to the BCPO® Board of Directors an appropriate sanction from among those set forth in Article VII hereof.

**5.05 Notification of Determination.** Following receipt and consideration of the decision and recommendation of the Ethics Complaint Committee, the BCPO® Board of Directors shall, within thirty (30) days of receipt of the Committee recommendation, vote upon implementation of the sanction recommended by the Committee, or any lesser sanction proposed by the BCPO® Board of Directors. A sanction will be implemented only upon its approval by a two-thirds (2/3) vote of the BCPO® Board of Directors. Should the BCPO® Board of Directors vote not to implement any sanction, the complaint shall be dismissed, and the complainant and respondent shall be notified of same in writing. Should the BCPO® Board of Directors vote to implement a sanction, the respondent, but not the complainant, shall be notified of same in writing by certified mail. The notice shall advise the respondent of the right to submit new evidence under Article VI and of the fact that, in the absence of any such submission, the sanction will be effective thirty (30) days after the respondent's receipt of the notice. Unless the BCPO® Board of Directors reverses its decision under Article VI, the complaint and the sanction shall be recorded in the respondent's official certification file.

## **ARTICLE VI**

### **APPEALS PROCESS**

**6.01 Limited Right to Appeal.** Any dismissal of a professional misconduct complaint, whether by the Ethics Complaint Committee or by the BCPO® Board of Directors, shall not be subject to appeal. A decision of the BCPO® Board of Directors to implement sanctions against a respondent is subject to appeal by the respondent, but the sole ground for such appeal shall be that the respondent has new, relevant information which was not considered by the Ethics Complaint Committee. Any respondent having new information to submit to the BCPO® Board of Directors shall, within thirty (30) days of receipt of the written notice required by Section 5.05, file with the BCPO® Board of Directors a written notice of appeal stating the reason for the appeal and including the new information not considered by the Ethics Complaint Committee. Following review of the entire investigative file, the decision and recommendation of the Ethics Complaint Committee and the new information submitted by the respondent, the BCPO® Board of Directors shall, within thirty (30) days of receipt of such new information, render a final decision which may not be further appealed. If the complaint is dismissed, the complainant and the respondent shall be notified of same in writing. If the appeal is denied, the respondent, but not the complainant, shall be notified of same in writing by certified mail, and the sanctions imposed by the BCPO® Board of Directors shall be implemented immediately.

## **ARTICLE VII**

### **SANCTIONS**

**7.01 Censure.** Censure may be invoked with respect to professional misconduct not deemed sufficiently severe to warrant greater sanction. An unpublished written reproach from the BCPO® Board of Directors shall be mailed to the respondent. A copy of this letter shall become a permanent part of the respondent's certification file. In the event of such a censure, the Certified Professional Organizer® would retain certification status and all of its rights and privileges.

**7.02 Probation.** A respondent may be placed on probation for a period not to exceed three (3) years; should, during the period of probation, any further professional misconduct complaints be found to be substantiated, the respondent's certification status shall

be suspended or revoked, as determined by the Ethics Complaint Committee and the BCPO® Board of Directors. A Certified Professional Organizer® placed on probation would retain certification status and all of its rights and privileges during the period of probation.

**7.03 Suspension.** Certification status may be suspended for a specified period of time not to exceed three (3) years based upon the severity of the professional misconduct. At the conclusion of the period of suspension, the professional organizer may apply to the BCPO® Board of Directors for reinstatement of her/his certification status. Had the professional organizer, absent such suspension, been subject to a recertification requirements during the period of suspension, such recertification requirements shall be imposed as part of the reinstatement process. A professional organizer whose certification status is suspended shall, immediately upon such suspension, not be entitled to any of the rights and privileges of certification status during such period of suspension.

**7.04 Revocation.** Certification status may be revoked in the event of egregious acts of professional misconduct, including without limitation knowingly falsifying information submitted to obtain and/or retain certification or cheating on the certification examination. Applicants for professional certification who, before certification status is awarded, are determined to have knowingly falsified application information or to have cheated on the certification examination shall be denied certification and may be forever barred from applying for certification. A professional organizer who has had her/his certification status revoked by BCPO® is not eligible for reinstatement of certification status. A professional organizer who has had her/his certification status revoked shall be eligible to re-apply for certification only if so determined by the BCPO® Board of Directors at the time of revocation and only following such period of time as the BCPO® Board of Directors may specify in its revocation determination. A professional organizer whose certification status has been revoked shall, immediately upon such revocation, no longer be entitled to any of the rights and privileges of certification status.

**7.05 Additional Disciplinary Sanctions.** The Ethics Complaint Practices Committee may recommend additional disciplinary sanctions, including without limitation mandatory professional education or other sanctions approved by the BCPO® Board of Directors. Disciplinary sanctions may not include the imposition

of fines, but may include the payment of restitution to a respondent's client(s).

## ARTICLE VIII

### PUBLIC NOTIFICATION OF SUSPENSION AND REVOCATION

**8.01 Public Notification.** Unless otherwise determined by the BCPO® Board of Directors in a particular matter, it shall be standard procedure to publish, in a manner deemed appropriate by the BCPO® Board of Directors, the fact of any suspension or revocation of certification status, including the identity of the professional organizer involved. No publication will be made of the imposition of any other sanction.

## ARTICLE IX

### USE OF CERTIFICATION CREDENTIALS

#### DURING PERIODS OF SUSPENSION AND REVOCATION

**9.01 Ownership of Certification Credentials.** All certification credentials, including without limitation logos, the Certified Professional Organizer® and CPO® marks, certificates, wallet cards, placards, decals, cuts, insignias, emblems and/or any other material used by the certificate holder to indicate or otherwise note status as a Certified Professional Organizer®, are and shall remain the sole property of the BCPO®.

**9.02 Prohibitions Against Use.** In the event that a professional organizer's certification status has been suspended or revoked, he/she is no longer permitted to hold herself or himself out as a Certified Professional Organizer® or CPO® and must refrain from using all certification credentials, including those described in Section 9.01 above. Failure to comply with this prohibition will jeopardize the possibility of reinstatement of or reapplication for certification status, should the BCPO® Board of Directors have determined that reapplication would be permitted.

**9.03 Refunding of Fees.** Should a professional organizer's certification status be suspended or revoked, there shall be no refund of any fees already paid in connection with such certification.

## ARTICLE X

### AMENDMENTS TO THE ETHICS COMPLAINT PROCEDURE

**10.01 Amendments.** This Complaint Procedure may be amended by a two-thirds (2/3) vote of the BCPO<sup>®</sup> Board of Directors, provided that written notice of any proposed amendment shall be given to the BCPO<sup>®</sup> Board of Directors together with the notice of the meeting at which the amendment will be considered.

**10.02 Effective Date.** An amendment so made shall be effective immediately upon adoption, unless a later effective date is specifically adopted at the time the amendment is enacted. Amendments shall be published to the organizing profession.

As outlined in Article V, a complaint of professional misconduct by a Certified Professional Organizer<sup>®</sup> must be signed and notarized, accompanied by substantiating documentary evidence, and submitted in writing to:

**BCPO<sup>®</sup> Ethics  
Complaint Committee**

**c/o Credentialing Ethics Specialist, BCPO<sup>®</sup>**

**1120 Route 73, Suite 200**

**Mount Laurel, NJ 08054**

## Contact Information

For more information about certification, contact BCPO® headquarters at 856.380.6842 or [Info@CertifiedProfessionalOrganizers.org](mailto:Info@CertifiedProfessionalOrganizers.org).