

Examination Content Outline

NEW for 2020 Exams

I. Preliminary Communication, 12%

- 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. Assessment, 18%

- A. Identify client behaviors, skills, and characteristics
 1. Habits and routines
 2. Perception of situation
 3. Personal preferences (i.e., learning styles, behavioral styles)
 4. Organizing skills (e.g., space, data, objects)
 5. Productivity skills (e.g., time, information, priorities)
 6. Technological/computer skills
 7. Physical considerations (e.g., injury, illness, limited mobility)
 8. Mental health considerations (e.g., ADHD, OCD, hoarding, dementia)
 9. Other factors (e.g., influence of age, religion, culture)
- B. Evaluate environment
 1. Characteristics of physical space (e.g., square footage, power source, doors/windows, furniture and equipment, safety

2. Materials and supplies

3. Technology tools

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

- D. Determine available budget

III. Project Plan Development, 16%

- A. Review assessment findings

- B. Determine scope

- C. Prioritize objectives

- D. Determine tasks

- E. Identify and recommend resources

1. Organizational tools and supplies (e.g., containers, labels)

2. Productivity tools (e.g., calendar, task management systems)

3. Technology Tools (e.g., digital storage, cloud-based, online, devices, apps)

4. Furniture and equipment

5. Referrals (e.g., other professionals, educational materials)

6. Removal options (e.g., donation, disposal, selling, shredding)

- F. Establish project timeline

- G. Estimate cost (e.g., consulting fees, supplies, vendors)

- H. Finalize project plan

IV. Project Implementation, 31%

- A. Teach, transfer and apply organizing and productivity fundamentals and methodologies
 - 1. Consolidate, sort and, categorize
 - 2. Eliminate physical and digital excess
 - 3. Identify and optimize use of containers
 - 4. Optimize use of space
 - 5. Decision-making
 - 6. Maximize function and usability
 - 7. Process and work-flow
 - 8. Goal setting and prioritization
 - 9. Planning and time management (e.g., calendaring)
 - 10. Maintain systems (e.g., sustainability and change)
 - 11. Optimize personal resources (i.e., energy, money, health)
 - 12. Create routines and habits
 - 13. Set boundaries and delegate
- 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, 12%

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

VI. Legal and Ethical Responsibilities, 11%

- A. Recognize [BCPO Code of Ethics](#)
- B. Apply [BCPO Code of Ethics](#) to practice
 - 1. Conflict of interest
 - 2. Confidentiality
 - 3. Fees and services
 - 4. Intellectual property, trademark, and copyright protection
 - 5. Accurate representation of skills
- C. Protection (e.g., records retention, identity, cybersecurity)

Suggested Resources NEW for 2020 exams

This list of Suggested Resources is provided to aid in candidates' preparation for the exam.

In addition to a self-study reading program, candidates may also prepare for the exam by attending professional workshops, joining a study group, accessing on-line material, taking credit and not credit courses, and

participating in an exam preparation class.

Candidates are not required to purchase and/or read these texts, nor does use of these texts guarantee successful completion of the exam. BCPO does not endorse any particular author or content.

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Goldberg, Donna
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McCorry, K. J.
Mark, Teri
Morgenstern, Julie
Morgenstern, Julie
Silver, Susan
Smallin, Donna
Stanley, Debbie
Taylor, Harold
Tiani, Jackie
Winston, Stephanie

Title

Code of Ethics
Getting Things Done: The Art of Stress-Free Productivity
Mastering the Business of Organizing
The Complete Idiot's Guide to Project Management
Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones
The Organized Student
Essential Managers: Project Management
Fabjob Guide to Become a Professional Organizer
Organized to Last: 5 Simple Steps to Staying Organized
Conquering Chronic Disorganization
Organizing for the Creative Person
Organize Your Work Day in No Time
Organize Your Office: A Small Business Survival Guide to Managing Records
Organizing from the Inside Out
Time Management from the Inside Out
Organized to Be Your Best
Organizing Plain and Simple
Ethical Pitfalls
Making Time Work for You
Organizing for a Living
Getting Organized (2006 Ed.)

Additional Resources

Author

Bougher, B & Worthington, T.
Dellaquila, Vickie
Keller, Gary
McKeown, Greg
Tolin, Frost & Stekette
Walsh, Peter
Varness, Kate

Title

Embracing Conscious Simplicity
Don't Toss My Memories in the Trash
The One Thing
Essentialism
Buried in Treasures
It's All Too Much
The ICD Guide to Challenging Disorganization