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Buses and Boats and RVs, Oh My! - Transcript

[Speaker 1]

Welcome to Charity Therapy, the podcast where we explore the ups and downs of the nonprofit sector and answer your burning questions. I'm your host, Jess Birken, owner of Birken Law Office, and I'm excited you're here. Imagine hanging out with me and my super smart, funny nonprofit expert pals.

You get to ask them anything about your nitty gritty nonprofit life and get their wisdom for free. Whether you're a seasoned pro or just strapping on your nonprofit boots, we're here to share stories and remind you, you're not alone on this journey. So get ready to join the conversation and bring me the tough questions.

I ain't scared. Ready to rock? Let's dive in.

Hello, and welcome to this episode of Charity Therapy. Today, I am joined by my friend, Avi Olitski. Avi is a congregational rabbi turned nonprofit consultant, that's a life path, who helps organizations recognize when they're stuck and helps them get unstuck.

Thanks for being here today, Avi.

[Speaker 2]

Thanks, Jess. I'm really glad to be here.

[Speaker 1]

You know, I wanted to have you on the podcast because when we met, I was just like, oh my gosh, he is amazing. And I need to get him on here talking about all this org theory and development stuff. And I know that you kind of have like a special skill on demystifying the process of strategic planning for nonprofits.

And I feel like this is something that so many of my clients and listeners need help with. I think people are scared about it. And maybe they think they did it once and it was a bad experience or something like that.

So before we jump in with our listener question today, could you give us like a little 101 about what good strategic planning should look like?

[Speaker 2]

Sure. It's actually a great question. And this idea of demystifying, it's important because it's foreboding, and it could sound like a burden or overbearing.

The first thing to understand, especially in the world of strategic planning today, is there once was a time where we could say, here's your five year plan. Here's your 10 year plan. I can't tell you what's going to happen next year, let alone next week.

We live in this world I like to refer to as the era of hyper transition. And if we're thinking about this era of hyper transition, everything is moving so quickly that central to any strategic

planning today is a really hardcore, robust action plan that supports the strategic plan and recognizes that all plans are dynamic. That's the first piece.

[Speaker 1]

I love that. Absolutely.

[Speaker 2]

The second piece is there are a lot of consultants out there that will write the end of the report before they even start the work.

[Speaker 1]

Yep, it's in the can.

[Speaker 2]

That's right. Any plan that seems boilerplate or that feels boilerplate or you have a sense that they're leading the witness, if you will, that's already a sign of the not good plan. So what can I give you as the sign of a good strategic plan?

[Speaker 1]

Love that.

[Speaker 2]

First and foremost, there needs to be empathic listening at every stage of the process. That this is about amplifying and hearing voices instead of limiting the scope and limiting and closing the door to the room. Then all of that is underscored by a real core of innovation.

[Speaker 1]

Love that.

[Speaker 2]

If innovation is not part of amplifying voices, then you're not doing any sense of planning. You're just sitting in a room talking.

And once we get through all of that, at least in the work that I do, and far be it for me to suggest that this is the good strategic planning, it really is spread over four phases. And how long or how short, that varies on the client and the organization. But those four phases are discovery.

It's learning about the organization, learning about the audience, learning about the mission, learning about everything. It's synthesis, and it's taking everything you've learned, not putting it out there, but just that active listening, and coalescing it into some sort of idea and understanding of whom you're working with. Then it's ideation, which is frankly, industry speak around brainstorming and testing and trying to do some design thinking around how can we make this a better place and what comes next.

And then outcomes, here's the plan. And so those four phases, that's the core of any good strategic plan.

[Speaker 1]

I love it. And I'm like, not really giggling, but almost like, oh, inside because you're hitting on so many things that are like, if your organization has poor culture, or is embedded in some bad habits of the nonprofit sector, your process is going to be inflammatory for so many people.

[Speaker 2]

So many people.

[Speaker 1]

Oh my gosh. So I love it. And I love that being the foundation leading into this question.

Because I feel like we're going to be able to riff on this. Are you ready for our listener question?

[Speaker 2]

Oh, I am ready, Jess.

[Speaker 1]

Okay, here we go. Here's our listener's question. All right.

I'm going a little crazy and need feedback. I'm the executive director of a nonprofit that does creative media work. We're a small team that's definitely passion driven, and it's not a path chosen by card punchers or money seekers.

Okay. I realize I have the power in the hierarchy at the org, but I'm getting so frustrated. I feel powerless since we're never making progress toward the next level of achievement that I envision.

When I present the vision to outside smart people, they seem to genuinely think it's amazing. But I feel like I spend all of my energy explaining, justifying, demonstrating, modeling, proposing, and trying to implement new structures internally, and we just aren't progressing. I get agreement from the team, and often it seems sincere, but then everyone just immediately reverts to their old ways without good justifications as to why.

Here's an example from the communication side. I want our team to learn how to create virality on TikTok in a structured way and stop making stuff people don't respond to. We've had conversations about changes, and yet nothing seems to happen.

A part of me thinks I just have a bunch of undisciplined, unmotivated, less than brilliant people on my staff, and we need to fire them and do a dramatic rebuild with people more aligned with our mission. But then another part of me wonders if maybe I'm just a shitty leader, and the problem is mostly me. I know it's hard to analyze with such limited info, but help!

I really want to make progress toward my vision, but I feel like we're in a standstill.

[Speaker 2]

Wow.

[Speaker 1]

Okay. There's a lot there.

[Speaker 2]

Wow. All right, Jess. If I had to quick punt, the two concepts that immediately come to mind, or better, not two concepts, but one concept and one tool, is Jim Collins' Good to Great.

I highly recommend everyone read this book. I'm a data-based theory guy. I really believe in using data to our advantage, not to measure performance per se, but to inform the paths that we take.

One of the things that Jim did, even though this book is on the for-profit model, there's a lot of things that can be translated to the non-profit sector, is he talks about one of the central attributes of those companies that go from good to great, or any positive organization writ large, is having the right people on the bus.

[Speaker 1]

Yeah, yeah.

[Speaker 2]

It doesn't matter where you're going. It matters having those people on the bus. If you have the right people on the bus, then you make sure they're in the right seats, and when they're in the right seats, you're going to figure out where you're going together.

I have to read into the listener's question that that listener already seems to sense that they don't have the right people on the bus. Sometimes, our gut is the best barometer. The second piece, Jess, I don't know how many of your listeners are familiar with the Colby A Index.

There are all these different tools out there we learn from. There's Myers-Briggs. There's DISC. There's StrengthsFinders. There's all these different tools out there, and many of them are great. Some people are skeptical about them. Some people think it's just another product to buy or sell.

[Speaker 1]

Right. They're a tool. They're a tool.

[Speaker 2]

It's a tool. I have used the Colby A Index. I use it in my own personal life. I have often used it for organizational assessments. What the Colby does is it measures one's instinct, so it's the gut that drives how individuals take action. Why do I bring this up?

Because, unlike all the others, your Colby never changes. With the appropriate amount of motivation, anyone could do anything, but understanding a team member's instinctive drive minimizes the amount of stress and frustration while maximizing their time, their energy, and their happiness. It very well could be that the way that the listener organizes information and shares information is completely opposite the majority of their team.

Therefore, they think, what do you mean? I'm clearly sharing this and articulating exactly what I'm thinking.

[Speaker 1]

Yeah. It sounds like they've been doing a lot of that.

[Speaker 2]

Correct. Whereas, based on where the team is, they might instinctively say, well, I need to research this, and I need to get into the weeds. Well, they're already moving on to the next brainstorm.

On one hand, we might say, sure, you don't have the right people. Yes, you need the right people on the bus. For me, the way that you measure whether or not you have the right people on the bus is understanding what is the entire solar system of your organization.

[Speaker 1]

Yeah. First of all, you are just the most kind and generous human in reading this question and giving such a warm and productive answer because I read this, and I'm like, maybe you are a shit leader.

[Speaker 2]

Fireball.

[Speaker 1]

Because I'm like, what is this? I know I have the power in the hierarchy of the org. Talk about a top-down approach. I read this, and I get a little bit frustrated.

Just having the title is not what gives you authority over people. You need to demonstrate leadership, and you need to share your vision with them in a way that they want to come on board and go where you're going.

[Speaker 2]

That's right. I'm with you. I didn't immediately jump to the, oh, maybe you are the shit leader, because for the listener to say that at the end really came across as a dose of humility to me.

[Speaker 1]

Yes, I agree.

[Speaker 2]

Had that statement not been there, then I would have been like...

[Speaker 1]

You're a jerk.

[Speaker 2]

Honey, you need to look in the mirror, right?

[Speaker 1]

No, and I think we've all been there, right? Oh, for sure. If you're in a leadership role, and you're just beating your head against the wall, trying to move something forward, and especially when you're passionate about something, and you're like, I know this is an amazing thing.

I know there's a need for this. You just can't get people to coalesce around you. It's super frustrating.

I work with startup founders all the time who are just like, they get it, and it's like, how do they translate it from their mind to everybody else? It's such a struggle.

[Speaker 2]

The other thing that I think would be really interesting to unpack with an organization, and I say this trying to reflect on what I believe is a non-binary world. When we talk about gender, you very often are faced with a situation where the person who's leading the organization is really not up to snuff. They're not up to the cause.

The man will say, I could do that. I'm going to make that happen, and I'm going to force it, whereas the woman who very well might be up to snuff, she's already second-guessing herself because of this toxic climate that we've created. Some people think it's amplified in the for-profit sector.

It's actually amplified even more in the dysfunction in the non-profit sector. Some of what I do is try to help create that environment where people see what those natural strengths there and don't shy away from them. I worry, without knowing anything about the listener, I worry what that environment looks like, both for her own or his own team and what those staff are experiencing as well.

[Speaker 1]

It goes back to your overview of what a good strategic planning process looks like. What I heard you say was, we're going to listen to everybody in the room. We're not going to close doors.

What's in the subtext of this listener's question is that they're like, I have a vision. I am the boss. I am going to tell you what the vision is.

They're not engaging. They're not hearing all the voices. They're not trying to do a strategic plan, but they're trying to execute on their strategic vision.

You just can't barrel your way through and just force people to take your edict from up on high or whatever.

[Speaker 2]

That's right. To be clear, what's interesting is there's a difference between an organizational chart and an accountability chart. This listener is saying, yeah, I realize I have the power of the hierarchy, but I feel powerless.

Well, maybe you are powerless. Power doesn't just come because of the role and the position that you have. There's referential leadership.

There's nominal leadership. There are all different types of power. Part of that is not leading from the top.

Like you said, it's leading from behind. Sometimes you have to be able to motivate your team not to follow your example, but to understand that they're valued and appreciated and that they have a role to play. It goes back again to, do you have the right people on the bus?

Maybe you, the leader, aren't the right person to be on that bus in the first place.

[Speaker 1]

Yeah, totally. Also, I would want them to talk with someone outside of their organization. The whole bit about, I want you to create viral content and stop creating content people don't respond to, that feels very fantasy, fantastical, magical thinking.

To say that you can absolutely capture in a bottle what makes something go viral or what makes something that donors will engage with or whatever it is, I feel like that's a little unrealistic.

[Speaker 2]

There isn't a recipe to viral content. There is a recipe to understanding what people want to see and what people look at, what people consume. If the reason the virality isn't happening is because of relevance and simple meaning and lack thereof, sure.

I'm reading in a similar way, Jess, that the listener, the one who's asking the question, the leader of this organization, completely disagrees with the barometer that their team is using to measure what's relevant and meaningful, which either means the listener has a disconnect or the entire team has a disconnect, but there's certainly a disconnect between those two groups regardless.

[Speaker 1]

Totally. I'm a big believer in, if you're the boss, effectively everything is your fault. If your team's not performing- Yeah, the buck stops somewhere, right?

Yeah. That's on you and you've got to figure it out. I love that they are asking the question and willing to look in the mirror.

If this person came to you and you had these facts, how does this person move forward? I don't know that just fire everybody is the right answer.

[Speaker 2]

Correct. Correct. This isn't even about a strategic plan.

This is doing a pulse check or a leadership assessment. Depending on how large the team is, I would want to sit down with a 60 to 90 minute one-on-one with each person. We're going to ask them the same question.

We're going to find out the challenges that arise and we're going to build almost a 360 degree of the organization. We're not doing a 360 of the question asker's leadership, but let's get a real lens on here, because at the end of the day, there are 70 faces to every question. If we understand that this listener's view of the organization is this, but what if one of their team members is saying, oh, we are robust and we are humming along and we are working like a team and another one says, no one listens to me.

I don't even know why I show up to work. What is going on there? Does each person understand the mission?

Does each person understand the goal? I often work with organizations that confuse tactic for strategy and don't know what the goal is. This listener said, I'm the ED of a nonprofit that does creative media work.

We're all passion driven. It's a small team that's passion driven. What does that mean?

What is their goal? Because already I'm hearing tactic. I'm not hearing the strategy and I'm not hearing the goal.

[Speaker 1]

Well, I think it's telling that they didn't really articulate their mission very well in this, what does that even mean? Creative media work. That's an outcome.

[Speaker 2]

Right. If it's a nonprofit that does so, what does that mean too?

[Speaker 1]

I know. I had the same thought. I'm like, what is your mission?

[Speaker 2]

Right. If there's difficulty articulating that, well already that, no, I'm not going to hold them to the fire or hold them to task in the same way because they sent in a mission and they sent in a question and it sounds like they are just pulling their hair out frustrated. I get that. We've each, I imagine, been in that seat.

There is not a day that goes by without a bone of frustration in the nonprofit sector. I see that in the for-profit sector with the clients I work with there too. How do you move past the frustration?

Going back to your original question, Jess, it's about trying to understand, give me a snapshot of where the organization is right now, and I got to hear from every voice to get there.

[Speaker 1]

Yeah. I love that. I think there are some takeaways I can get out of this.

To me, I think for this particular person who wrote in, just remember that hierarchy isn't a blank check to sort of get your way. You have to enroll people into your vision, and you need to be clear on your vision, mission, and what your goals are. You need to listen to every single person at the organization and make sure that everybody is coming with you.

Then, once you feel like you've been doing that, it's probably a good idea to really assess your team. In my experience, if you are feeling frustrated with people on your team, that is worth looking into. Using a tool like the Colby A Index, doing some things to measure your team's personalities, their instincts, defining everybody's roles, and making sure you have those right seats on the right bus.

Checking out Jim Collins' book, From Good to Great, and learn about do you have the right people on the bus? Is everyone driving the bus in the same direction?

[Speaker 2]

That's right. That's right.

[Speaker 1]

But sort of starting with- And how many people think they're on a boat? Yeah. Or an RV or something.

[Speaker 2]

Right.

[Speaker 1]

Or they're going camping with a backpack. You're not even on a bus. But I think really that concept of you can't just be like, I'm at the top and so therefore, I'm in charge.

Leadership, it comes with a lot of responsibility to bring people along with you. And that's not always just dinging them on the head and telling them what to do.

[Speaker 2]

I would also add one more piece, Jess, that I just thought of when you mentioned all the different people in the seats and who's doing what. I don't fully believe that EOS, entrepreneurial operating systems, can apply to the non-profit sector. But I do really understand and appreciate how there are different roles and different seats for the visionary, for the integrator, for the implementer.

And when the visionary has to be the implementer, that's where sometimes there's a stress test on the system and it fails. And that could be what's happening here too. Maybe the listener simply needs to stay in the lane of being the visionary.

[Speaker 1]

Yeah. I love that. And if you don't know what EOS is, there's a great book called Traction.

You can read and learn about that. And I love that you qualify that, that it's like, everything from the for-profit sector doesn't always translate to the non-profit sector, but there are tools that we can learn from.

And I find that so true that so often there is a visionary person and they need their operations person standing next to them to go implement and execute, or it just all falls apart. 100%.

[Speaker 2]

Correct. I often say that the only real difference between the non-profit sector and the for-profit sector is tax status, right? The non-profit can be just as financially successful as the for-profit.

They just have to spend their money at the end of the year. But if there's mission there, that's the distinguishing factor.

[Speaker 1]

Yeah. And I talk people out of starting non-profits all the time and say, you can be a business that does good deeds. That's fine too, right?

[Speaker 2]

That's right. Be a B Corp, right?

[Speaker 1]

Absolutely.

[Speaker 1]

Let's go. I agree.

[Speaker 1]

This is awesome. I feel like, I hope this person's listening because you've gotten some really good advice. Avi, I really appreciate you being here.

You're amazing. I cannot wait to get to know you better. I'm super glad we got introduced.

If folks want to connect with you, if somebody is like, I need to talk to him, where can people find you?

[Speaker 2]

LinkedIn is always easiest, right? Find Avi Olitski. There is no other Avi Olitski in the world.

That's the beauty of having this name and this identity, right? You have a lot of other names out there. Avi Olitski, you're going to find me.

That said, you're welcome to go to olitskiconsulting.com as well. That's O-L-I-T-Z-K-Y, olitskiconsulting.com. You'll find me or a member of my team and it certainly will reach me.

[Speaker 1]

Awesome. We'll put all that in the show notes too. Folks, if you enjoyed this episode, do me a huge favor.

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About the Author



Hi, I'm Jess Birken.

I'm the owner of Birken Law Office, I help nonprofits solve problems so they can quit worrying and get back to what matters most – The Mission. I'm not like most attorneys, I actually have an outgoing personality, and – like you – I like to think outside the box. Most of my clients are passionate and have an entrepreneurial spirit. I'm like that too. My goal is to help you crush it. Getting bogged down in the minutia sucks the joy out of the important stuff. My clients want to do the work – not the paperwork.

Let's connect!

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