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Why Nonprofits Need Standard Operating Procedures – Transcript

Jess Birken 00:00:02 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.

Meghan Heitkamp 00:00:42 Welcome to charity therapy. This is Meghan. If you're listening to this on the release date. Happy thanksgiving. Today we're bringing back this episode that feels extra relevant at this time of the year. Jess and I will be talking about SOPs, that standard operating procedures and getting all the things out of your head and throwing the busy badge in the garbage.

Meghan Heitkamp 00:01:03 This one's for all of you nonprofit people who will be burning the midnight oil as we get close to the end of the year. I hope you enjoy.

Jess Birken 00:01:11 Hello!

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Jess Birken 00:01:11 Welcome to this episode of Charity therapy. Meghan and I are here again to answer all manner of nonprofit questions. Meghan, do you have your tiny chef's?

Meghan Heitkamp 00:01:22 I do, I have my tiny chef. I have to grab it.

Jess Birken 00:01:25 Tiny chef I have my tiny chef, too.

Meghan Heitkamp 00:01:28 We're both happy to be here.

Jess Birken 00:01:29 If you don't know who Tiny Chef is, you really should just get on YouTube. Yep. And put in the words Tiny Chef. It's a really good palate cleanser.

Meghan Heitkamp 00:01:38 Hello, hello.

Jess Birken 00:01:39 Pure doom scrolling on the internet. You know what I mean?

Meghan Heitkamp 00:01:42 Yep. It's very important. Thanks, Jess.

Jess Birken 00:01:44 I'm very happy to be here.

Meghan Heitkamp 00:01:46 Should we move away from Tiny Chef? Sadly, for a moment here and talk about the content of this episode, yes.

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Jess Birken 00:01:53 Unfortunately, we can't dedicate our whole episode to Tiny Chef as much as I would like to.

Jess Birken 00:01:58 Truly, truly. But I will say this.

Meghan Heitkamp 00:02:01 Episode is going to be like a little different than our typical ones. This time we're not asking like, strictly legal questions, but instead we're looking at how to run a non-profit as a small business. And listeners, if you could hear Jess and I talk throughout a normal workday, you'd know that we're both like super big nerds when it comes to fixing our project management and like, business systems here at the firm. And that sounds like really, really lame, even just to, like, say, out loud right now.

Jess Birken 00:02:33 It's cool. We're cool nerds.

Meghan Heitkamp 00:02:36 It's so cool. It's so cool.

Jess Birken 00:02:38 Efficient operations are cool.

Meghan Heitkamp 00:02:41 Exactly. And it's like, frankly, all kinds of businesses need this stuff, including nonprofits, including nonprofits. It's like how you make the things go. So normally I start out these episodes by having you give us some a little overview or background information about a topic, but I actually have a listener question that I feel like is a perfect sort of introduction question.

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Meghan Heitkamp 00:03:03 So this person says, why do so many nonprofits struggle with project management? Do they just not have the know how or is it a matter of resources? I find it super frustrating. Should an organizations invest more in project management and systems so that they're more efficient overall?

Jess Birken 00:03:20 Yes. Period and outro. Yeah.

Meghan Heitkamp 00:03:23 Done. That's the whole episode.

Jess Birken 00:03:26 Yes. Yes they should. They should. They're like putting the hail on the net. Hitting the hail.

Meghan Heitkamp 00:03:31 On the head. Yeah.

Jess Birken 00:03:32 Yes, absolutely. 100%. I wish all non-profits valued their project management and systems even just, like a little bit more. And I get it. Like, they're usually under-resourced, and they're usually just cobbling things together, and then cobbling things together becomes the system. But if we all agree that the mission is important, then? Isn't it also important to run our nonprofit smoothly, efficiently, so we can, like, make as big of an impact as possible? Right. That's what we're trying to do here. We're not even a non-profit.

Meghan Heitkamp 00:04:08 Yep.

Jess Birken 00:04:09 So, like, having a tax exempt status isn't an excuse for not doing things well. But I feel like the why here like really kind of like lifts up the carpet on some like cultural stuff. And we've talked about this before, but it's a huge problem in the

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nonprofit sector that we sort of like devalue our infrastructural services because it's overhead. Yep. Right. And so $0.92 of every dollar goes to program and that $0.08 is evil. Yep. Like no it's not evil. Right. So everything from like your staff to your equipment and software and the lights and the computers gets sort of, like, shrunk down, never updated. And just like. Minimized as much as possible so that $0.92 or $0.93, we could improve our number of cents on the dollar that goes to program. And that just makes it a certainty that you're not going to invest in things like project management. And there's this mentality that like working overtime and just grinding it out, just putting in more time and more effort into everything means that you believe in the mission the most.

Jess Birken 00:05:24 And it's like this competition to who can be the best martyr for their mission and who sacrifices the most of their life. But ultimately, implementing some basic business management strategies can really help you be more effective overall, without all the terrible mental health and boundaries and problems that come to us in the nonprofit sector by working 1,000,000 hours like, let's just be more efficient so we can actually have more impact.

Meghan Heitkamp 00:05:52 Right. We don't need to measure our dedication by how many hours we work overtime. And instead it's like if you can get that same amount of work done in a normal 40 hour workweek because you can do things more efficiently, that's totally a win. You're not losing your badge of honor by saying, I only work 40 hours a week.

Jess Birken 00:06:09 Yeah, 100%.

Meghan Heitkamp 00:06:11 Totally. All right, Jess, I've got a question for you on this topic. Then let's do it. So listener wrote in and said, we are an all volunteer organization and have never been very organized. It shows in our turnover and our effectiveness in general.

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Meghan Heitkamp 00:06:25 We're attempting to become a more mature organization, but we have a lot of we will fix that later type issues. One of the big ones is storing knowledge. It seems like no matter what we do, we're always reinventing the wheel. Every new event or volunteer, we have to figure out how to do this all from scratch. Any suggestions to fix this?

Jess Birken 00:06:45 Oh yeah. I mean, hashtag relatable content, right? Like this is not a nonprofit specific problem. Like anybody that's worked in a small to midsize business has seen this. I mean, at the firm, we've been dealing with this, too. You just cannot grow or evolve if all the information only lives in people's heads. And if it only lives in someone's head, then you're going to be redoing things. Or like, breaking everything down to the smallest possible denominator every single time somebody has to learn it all over again. And I guess you know, the answer here is super simple. You have to get it out of your head.

Jess Birken 00:07:27 And I mean, I just relate to this even from like, volunteering on my kid's robotics team. It's like if anybody in one of the key areas leaves, they're screwed because.

Meghan Heitkamp 00:07:39 Absolutely.

Jess Birken 00:07:40 Only Steve knows how this works. Only Jennifer knows how that works. And it's like, that's been something I've been trying to help them with is just documenting. How do we do this? Who do we buy our t shirts from? How does that work? Where do we store our graphics files? Like just making a system so that there is a standard operating procedure for all the things that you do and like literally all of it. Because if somebody has to come in tomorrow and figure it out, how do you open the office? How do you collect the mail? How do you buy the t shirts? Who do you talk to? How do you train your volunteers? How do you use the printer? Write all the things like big or small, whatever. They have to be documented. And yes, that takes time.

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Jess Birken 00:08:25 And yes, that's time theoretically away from the mission. But you're sort of paying the tuition when you do that, because now you've written it down and now somebody can learn from that instead of wasting all of your human resources like retraining everybody or worse, reinventing the wheel when somebody new comes on board. So it does take time. There's no way around that. But like every time you do something routine, you shouldn't be done until you've documented how to do it. Yeah, there are like tons of platforms for this, right? Like we use this awesome one called tetra. You could also use Evernote, you could use OneNote, you could use Google Docs. But I would say, don't do that because I freaking hate Google Docs. Yep, that's another episode. I actually got into an argument with one of the high schoolers that my child is friends with about, like the relative benefits of like, Google Docs. I like to think I won that debate.

Meghan Heitkamp 00:09:22 I mean, you are a grown adult running a business based on office products only and not Google Docs.

Jess Birken 00:09:29 Just because you've used it at school your whole life doesn't mean it's better. It's just the only thing you know.

Meghan Heitkamp 00:09:35 Absolutely.

Jess Birken 00:09:36 Yeah, but it's really not even like the system. The most important thing is that it's a platform that everyone can access, everyone can update, everybody can look at it and go, oh, we tweaked that. This is out of date. I need to update it. Or like, oh, why do we do it that way? Because now there's this like AI thing that we could do that would take like one tenth of the time. Let's consider updating our process when you have everybody involved and everybody can like see what the rules are and what the standard operating procedures are, you're going to just inherently be more efficient and improve your process. And you don't want to pour all of your energy into like making something, but putting it in a three ring binder that goes up on a shelf and like nobody ever looks at and nobody has access to.

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Meghan Heitkamp 00:10:27 Yeah. And I think, you know, we've been doing this, like you said, at Burke and Locke quite a bit.

Meghan Heitkamp 00:10:32 And one of the things that comes up when you start documenting all of this is you don't realize how much is really in your head. You know, there's like.

Jess Birken 00:10:41 Oh, dude, yes.

Meghan Heitkamp 00:10:43 You can make a really basic checklist at first, and then someone who's not familiar with your day to day work will look at that checklist and be like, I have no idea what I'm supposed to do. Still, like, great, you have this checklist. I don't know what it means. And so I think it does take a little bit of a shift in your perspective to say, okay, I'm going to draft this for anyone in the future to come forward and look at this. And it doesn't have to be a checklist. It doesn't have to be a written document at all. You can record a video, you can record a voice note like whatever makes the most sense. But the biggest thing is that you can't keep it all in your head, even just for you. If you're the executive director of a small organization and everything sort of flows through you like there's too much for you to remember, too.

Jess Birken 00:11:26 Like, yes.

Meghan Heitkamp 00:11:28 That's valuable brain space. You could be freeing up preach so that you can think about other things. And when you have to remember how to schedule your monthly newsletter, you can go back and look at your own.

Jess Birken 00:11:41 Yep.

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Meghan Heitkamp 00:11:42 Standard operating procedure on that.

Jess Birken 00:11:44 Especially that. Like, I don't want to lose track of that because your quality of life and your ability to, like, relax at the end of the day. So much of that hangs on your ability to sort of say, like, I know where all the things are and I can like, let go of this for a minute because everything is going to be there when I wake up tomorrow. But if you're sort of like holding everything in your brain and trying to remember where all the things are, and that's like, do you have a project management system? Do you know where all of your things are in a state of to do, doing done right? Do you know that thing that you have to do twice a year? Maybe there's this like annual filing and it just takes 15 minutes.

Jess Birken 00:12:25 But like every time you do it, you kind of have to reteach yourself because you can't remember from the last time you did it. All of that stuff should be documented. And yes, it's a big undertaking. And yes, it's a pain in the ass. And yes, it's going to. You know, like.

Meghan Heitkamp 00:12:41 Slow you down.

Jess Birken 00:12:42 It's going to get that the mountain of laundry problem, the overwhelm is going to be triggered. But it's worth doing.

Meghan Heitkamp 00:12:49 Absolutely, absolutely. You know, it's all coming back to this idea of like when you are running a nonprofit and you're inherently running on less than you want to be like. That is where so many of our clients work on. You know, I have good news. This is a free thing that you can do. Yes, it takes some time, but you don't need to invest in super fancy software or anything like this. You can just take some of that knowledge out of your head, both for you and for the, you know, future of the organization so that the important institutional knowledge doesn't get lost.

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Jess Birken 00:13:23 So, yeah, I mean, we just had a client the other day who was like, I'm the new Eddie, and the old Eddie was here for 30 years and didn't write anything down.

Meghan Heitkamp 00:13:31 Yeah, I don't know how to do the basic stuff or I don't know what I'm missing, you know? Absolutely.

Jess Birken 00:13:37 Yeah. It's not cool. So what do we have for takeaways here Meghan?

Meghan Heitkamp 00:13:40 All right I have a couple for you. So first I think it's important to note that, you know, working in nonprofits, it's not a competition to prove your dedication. There's not this sort of like benchmark of you've ground yourself down to a nub, and therefore you are more dedicated in the mission than your colleagues. We need to change that whole mentality around. Which leads directly into my second point, that doing things more effectively and efficiently is ultimately better for your mission. Taking the long route over and over and over, because it's, you know, you've got that badge of I worked until 2 a.m. kind of feeling isn't actually better for your mission.

Jess Birken 00:14:16 So throw the busy badge in the garbage.

Meghan Heitkamp 00:14:19 Exactly. Get rid of that. And the last one is just basic. It's worth investing in the business of the nonprofit, whether that's investing time, investing money, whatever you can put towards building sustainable practices within running the business will ultimately help you be more efficient and dedicate more time and energy towards your mission driven work. At the end of the day, yeah.

Jess Birken 00:14:43 And speaking of investing, I will just put in a shameless plug for Airtable. Oh, as the tool you should be using.

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Meghan Heitkamp 00:14:51 The.

Jess Birken 00:14:51 Best. And yeah, it might not be free for you as a non-profit, but it is worth its weight in gold. You can do almost everything you want with it. It's cloud based. It's totally flexible. Anything that you do, any mission you have, you can make this thing work for you. Meghan and I are constantly saying how much we love Airtable, so I don't get any money from promoting Airtable. I just think Airtable is, like, amazing.

Jess Birken 00:15:16 And invest in something that's paid. And don't just stick with Google products because they're free for non-profits. They're garbage.

Meghan Heitkamp 00:15:25 Absolutely. Find the tool that works for you and take the time and effort you need to make it work for the nonprofit long term. Yep.

Jess Birken 00:15:34 Well, I think those are some great takeaways. And if folks want to check out Airtable, go to airtable.com. Do it. Try it. It's so amazing. We love it. It does so many things. Meghan, thanks for being here.

Meghan Heitkamp 00:15:51 Thanks, Jess.

Jess Birken 00:15:52 Folks, if you enjoyed this episode, go subscribe. Go rate it. Apparently the Apple podcast thing is like where you should leave a rating. I'm an Android, so I can't rate this, so it's up to you. You're going to have to do it. Go to your Apple app. Rate us. Give us five stars. Share it with a friend. It really helps us out. If you have a question.

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Jess Birken 00:16:16 Or story to share. We need you to ask us.

Jess Birken 00:16:19 We need a story.

Jess Birken 00:16:20 We need your question. So send me a note online. Thanks for listening.

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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.

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