

Punking Part Three: Praxis and Leadership

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Introduction

This workbook/zine is a companion to our two previous “Praxis”: workbooks/zines: *Punking: The Praxis of Community Acupuncture* and *Praxis and the Social Container*. Praxis means “practice as distinguished from theory; the application and use of knowledge and skills.”¹ It’s based on the Greek verb “to do”. All three workbooks are about the doing of community acupuncture, including those foundations that make the doing possible.

The first Praxis is about doing community acupuncture clinically, particularly the ways in which it’s different from doing private acupuncture. The second Praxis is about social entrepreneurship and how small business is foundational to the doing of community acupuncture. This Praxis is about the leadership and management of organizations in the context of doing community acupuncture.

All three of these workbooks/zines have come into being because, as the result of having an acupuncture school (POCA Technical Institute), we realized how complex community acupuncture really is. This is a confounding realization, because we all fell in love with community acupuncture in part for its simplicity. By our third year of operations, one of our school’s advisory board members pointed out that we really needed some form of leadership development for our students, and the board of directors enthusiastically agreed. However, we discovered that the available resources for leadership development didn’t seem to work for our particular setting, so once again, we were going to have to DIY our own resources.

Which turns out to be an apt reflection of the nature of leading and managing in a community acupuncture context. You have to make what you need, make it up as you go along, and make do.

It’s worth revisiting the introduction to the first Praxis workbook, in which a POCA Tech student described her experience of punking as similar to focusing a wide-angle lens. She discovered that treating patients in a community acupuncture setting requires continually zooming outward to see the big picture, then zooming back in to focus on the tiny details. That dynamic applies to managing organizations too: it’s a real challenge to see the big picture clearly enough to figure out how to navigate the small details (and there are a lot of small details!) but if you focus on the small details at the expense of the big picture – which is what acupuncturists tend to do in any context, unfortunately –you can get lost and overwhelmed. You need to figure out how to see the forest and the trees at the same time.

¹ <https://www.dictionary.com/browse/praxis>

Similarly, punking is all about the practitioner's intention. The great Miriam Lee, in her book *Insights of a Senior Acupuncturist*², says that if your intention isn't what it should be, you can't expect good results from your treatments. It's notable, though, that most punks don't approach leadership and organizations with any kind of clear intention, possibly because there haven't been many conversations about how to do that.

POCA Tech students need leadership development because being a community acupuncturist is likely to put you in unfamiliar territory where there's nobody to tell you what to do; where you might be the first of your kind; where other people are looking to you to determine what happens next. You might be the first person to open a clinic in a town that's never heard of community acupuncture. You might be starting up a nonprofit organization and having to recruit members for your board. You might be serving on another clinic's or organization's board where nobody knows anything about governance. Eventually, you might be creating jobs for other punks. It's hard to know exactly what kind of classwork could prepare you for such big unknowns, but we hope this workbook/zine is at least an introduction.

The material is divided into five sections:

1. Background, which is mostly about the relationship of community acupuncturists to organizations.
2. Blueprints, which is an overview of the structure of organizations and leadership, assuming no prior knowledge but possibly plenty of mental/emotional baggage.
3. Blueprints in More Detail, which drills down into topics like meetings, volunteers, managing a nonprofit board, and starting a nonprofit organization.
4. Resources Bricolage, which attempts to translate mostly conventional resources for leadership and organizational management into something useful for community acupuncturists.
5. WCA Case Study, which describes how one community acupuncture clinic navigated its leadership and organizational challenges.

You might or might not want to read this material in the order it's presented; skipping around to different sections might be more useful in terms of navigating between the big picture and the small details.

² Lee, Miriam. *Insights of a Senior Acupuncturist: One Combination of Points Can Treat Many Diseases*. Blue Poppy Press. Boulder, CO. 1992

Part 1: Background

Punking

Community acupuncturists call ourselves punks, which on one level is a joke but on another is an entirely accurate description, as well as grateful homage to all punk art. If conventional acupuncture were music, community acupuncture would be punk rock; if conventional acupuncture were Hollywood, community acupuncture would be No Wave Cinema, etc. From the first Praxis workbook, here's a not-necessarily-comprehensive list of the similarities between community acupuncture and punk subculture:

DIY ethic

minimalist/simplicity

iconoclastic

anti-authoritarian

subversive

experimental

powered by zines and other self-published stuff

concerned with social injustice and economic disparity

focused on direct action

rejecting perceived excesses of the status quo

often described as “too angry”.

Having devoted two workbooks to applying our punk filter to acupuncture clinical practice and small business/social containers for acupuncture, it's time to do the same for leadership and organizational management. Separated from the world of capitalism where CEOs are paid two hundred times the average worker's salary, leadership is just a category of work that has to get done — by somebody, whether or not they feel like they know what they're doing. So, let's talk about leadership for punks, or the organizational management equivalent of learning to play drums in your garage.³

It's worth revisiting the punk art concept of *bricolage*, which comes from a French word for puttering around or tinkering. It means making do, constructing something out of

³ Maybe it's not even drums --maybe it's more like Iggy Pop's band the Stooges playing their first public show: with a blender, a vacuum cleaner, several fifty-gallon oil drums, and a hammer.

(https://www.newyorker.com/magazine/2019/09/02/the-survival-of-iggy-pop?utm_source=pocket-newtab)

what's available: improvisation, using found objects, finding meaning in a jumble of seemingly unrelated stuff. Punks often take a bricolage approach to their acupuncture clinical work, combining various technical approaches into an individual style rather than adhering to a particular acupuncture lineage. Bricolage/making do/DIY describes a punk's entire attitude toward the project of making acupuncture accessible to people who otherwise couldn't afford it.

Fortunately, tens of thousands of books have been written about leadership; meanwhile nobody can agree on what it is or how to do it "right". Organizational management is similar. It's a perfect field in which to scavenge, borrow, repurpose and make do with anything we can get our hands on. Nobody else is doing any better! There's no reason not to get out our handmade instruments and start experimenting.

Punks, Leaders and Organizations

But can you even apply a punk ethos to the topic of leadership and organizational management? Do people who are enamored with a DIY ethic, minimalism, and being iconoclastic, anti-authoritarian, subversive, and experimental even *want* organizations? Do they want to be led? By anybody?

In my experience, a lot of the time the answer is: No, they don't. In fact, punks seem to have an innate desire to throw rocks at organizations. And leaders.

Things can get awkward if you're the leader. I've encountered my fair share of rocks but nonetheless I'm not giving up on this topic. I stand by what I wrote in the first Praxis workbook: "One of the commitments that defines punking is the decision to do what it takes to make acupuncture accessible to as many people as possible: to lower social, economic, and other kinds of barriers. That commitment shapes the punking job and it's what gets punks out of bed in the morning, day after day." This commitment applies to organizations and leadership — actually, it's an argument *for* organizations and leadership.

Making acupuncture accessible is *work*, because it's not inherently accessible in our society. And it's not going to magically become accessible just because we want it to be. Organizations are complex tools to coordinate human effort — which means they can be used to coordinate multiple humans' efforts to make acupuncture more accessible, which means being able to accomplish more than an individual human can. We can lower more barriers by working together than we can working alone.

Many punks were originally attracted to the practice of acupuncture by its simplicity and immediacy; it's the essence of direct action. Even though our society is afflicted by a host of complex problems and injustices, you can make a suffering person feel better instantly by putting a few inexpensive acupuncture needles in the right places. Needles, cotton balls, and stillness: sometimes that's all you need to make a huge and lasting difference in somebody's life. And it's kind of subversive to boot, so, what's not to love?

Nothing. It's just that immediacy has its limits. One person can only treat so many people by themselves, for so long. You don't have to renounce direct action to recognize that other strategies and other complex tools, like organizations, can be useful also in the project of making acupuncture accessible.

Some punks, however, are attracted to the practice of acupuncture because they've given up on everything conventional, including conventional tools like organizations. They've felt rejected by conventional society, and so they reject it right back. For some of us, practicing acupuncture is our last-ditch attempt to be part of society in some way, before we give up entirely, pack up and head into the woods to live off-grid. (Assuming that's a

viable option — for many people, it isn't.)

The idea of managing organizations doesn't sound appealing at that point when you've already given up on "normal" social structures. For some people, heading off to the woods is probably the right choice; but I think there are some other less drastic options, that aren't immediately obvious, that involve working with organizations. That's the argument this workbook is going to try to make.

You don't have to embrace, forgive, or submit to the status quo to learn how to use organizations as tools. If the status quo is the bathwater, organizations are babies you don't have to throw out with it. Organizations are tools just like acupuncture needles are tools, and all tools serve their users' intentions.

[*Praxis and the Social Container*](#) addressed the idea that community acupuncture as a concept isn't much good to suffering people; it has to actually happen in the real world, which means it requires a social container held together by relationships, boundaries, resources and systems — elements that have been scavenged or repurposed in service of the mission. This workbook assumes that you've made peace with the idea that you can't just critique existing structures, you need to be willing to build alternatives, and building is a lot harder and a lot more valuable than critiquing. This workbook also assumes that you recognize the necessity of either being an entrepreneur or working for entrepreneurs, and now you're ready to think about the social container in more detail, including the possibility of implementing organizational structures.

The Simplest Social Container

The absolute simplest social container for a community acupuncture clinic is a self-employed, sole proprietor punk. This legal structure requires nothing more than for the punk to have a social security number and to fill out self-employment tax forms every year. The punk can put their revenues from treatment — cash and checks — into an envelope, and then into a designated checking account, which they can use to pay expenses like rent and utilities. They can put their receipts from business expenses into a shoebox (or the digital equivalent, an email folder). They can buy simple malpractice insurance and add slip-and-fall coverage. They can answer their phones themselves and keep their overhead low by having a small space. They can get by without an accountant, a lawyer, employees or volunteers. There's nothing wrong with doing business this way. Everything else is optional.

For a lot of punks, this structure works just fine. It plays to their strengths and minimizes potential weaknesses, and it makes affordable acupuncture available to people who would never have had it otherwise. I've found that it helps to remind myself sometimes that if all else fails, I could always go back to this model! If you truly find organizations oppressive, you don't have to use them; your practice can just be *you*. (This presumes of course that you're not dealing with any kind of disability that makes working alone impractical.)

It's important to remember that the simplest version of the social container is also the foundation for any other, more complex organization that might ultimately rest on it. *The foundation of every community acupuncture clinic is a punk's ability to establish a large enough patient base to make a living.* If you haven't got that there's no point in trying to move beyond it. In a sense, each punk working for a larger organization always has the same basic responsibility as a sole proprietor punk: attract enough patients. What varies with larger organizations is who takes responsibility, and how, for maintaining a larger, more complex social container.

Pros and Cons of More Complex Social Containers (Organizations)

You might consider other options than working alone if you are concerned about some of the drawbacks to being a sole proprietor. The upside of being a sole proprietor is that your practice is just you — and that's also the downside! Drawbacks include: loneliness; having to do every task related to your business whether or not you like it or are good at it, because there's nobody to delegate to or even ask for help; being taxed at a higher rate than an employee of a corporation; and building up your practice as a resource for your community only to have it disappear if you stop punking. In my experience, solo practice can be uniquely empowering, but it can also be uniquely exhausting and discouraging.

You don't have to jump into more complexity all at once; you can ease into organizational management in stages, and in fact that's what most punks do. For the majority of community acupuncturists, organization-building happens incrementally. (If you like stories, at this point you might want to skip to the section on WCA as Case Study.)

The advantages of working in an organization instead of alone include:

Company. Humans are social mammals and most of us feel better with other people around, particularly when it comes to work. The value of social support can't be underestimated.

Division of labor. Nobody is good at everything, but everybody is good at something. People generally enjoy doing what they're naturally good at. If you can take advantage of humans' natural diversity by dividing up the many, many tasks of a business among people who will be good at and enjoy different parts of it, you can have a lot of fun — and meanwhile everyone can grow into talents they didn't know they had.

Taxes. Employees of a corporation have a tax advantage over self-employed sole proprietors.

Impact. An organization can have a greater impact than an individual, both quantitatively and qualitatively.

Longevity/Stability/Resilience. An organization can go on doing the work it was made to do long after its creator has retired, and in the interim, an organization can persevere through challenges that might derail an individual.

The disadvantages of working in an organization instead of alone include:

Humans and their problems. Or as John-Paul Sartre said, Hell is other people. If you choose to work with other people, you have to deal with other people (and they have to deal with you).

Structure. Somebody has to be responsible for how you and the people you work with are organized, and if you are the business owner, that somebody is you. This is potentially a huge amount of work on top of the clinical work of punking.

Cost. As a business model, community acupuncture is the most lucrative (at least in the short term) if you work alone, doing all the work yourself and keeping all the money yourself. The infrastructure of an organization can be costly; there's often a direct trade-off between how much structure you have and how much money you take home.

The most meaningful advantage, though, to working in an organization is *inclusion*. If you're truly inspired by making acupuncture available to as many people as possible, you have to recognize that an organization of punks can open up access for many, many more patients than a solo punk can. Furthermore, most people (including punks) aren't cut out to be sole proprietors for the long term; that's a relatively uncommon and valuable skill set. If sole proprietorship is the only model available for punking, that means any number of otherwise skilled, devoted punks are simply not going to be able to work, and any number of patients are never going to benefit from their talents — just because those talents don't include being a sole proprietor. And beyond punks themselves, the existence of community acupuncture organizations makes it possible to include more people in the project of making acupuncture accessible. Non-punks can make enormous contributions to increased access and organizational stability as administrative volunteers or employees.

Organizations can function as a kind of collective investment: punks working together so that they all have a place to work, ideally for the long term. Organizations can also be a collective creation: a shared project that depends on a group of creators working together to make the space that they want to work in. Organizations can be a form of punk art, as subversive and experimental as music played on a vacuum cleaner.

Insert: Community Acupuncture is a Social Business

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When I first heard this phrase, it was explained to me that social businesses value building “social capital” – reputation and goodwill – more than they value accumulating money profits. Of course, we have to earn enough to pay the rent and salaries, and utilities and supplies, etc., but once the bills are paid, what matters most is growing roots into our community and providing a valued service.

Ten years into working at and co-managing Sarana Community Acupuncture, I find myself surrounded by social dividends.

Years ago, I don't remember where, I heard that humans evolved to interact best in small communities, villages of several hundred people at most, where everyone pretty much knew everyone else, by reputation, if not more closely. By contrast, I live in an urban area among hundreds of thousands of people, but I have interactions with very few. In my pre-acupuncture life when I worked at an architecture firm, I mostly interacted with my dozen-or-so co-workers, plus, at most, another couple dozen friends, relatives, and acquaintances who I might keep up with regularly on evenings and weekends. Later, as a self-employed freelancer, I could go days without conversing with anyone between 9am and 5pm unless I took a walk to the copy store or corner grocery. I don't think my situation was unusual. I don't think I felt isolated, but in retrospect, I see my prior professional life as socially impoverished.

Now, as a community acupuncturist three days per week, I regularly interact face-to-face with a couple hundred people each week. Although my circle of fellow-employees is less than a handful, I also see a rotating array of 20-30 volunteers who work the front desk and do laundry, housekeeping, bookkeeping, and plant care. Most of them are stellar people: idealistic, competent, responsible, wanting to give of themselves to support their community clinic. Their backgrounds are widely diverse: black, white, American-born, immigrant, Asian, Latino, teachers, students, parents, retirees, an engineer, a real estate agent, a translator, artists, musicians, actors. They expand my world and make my life easier.

The biggest enlargement of my social sphere are my clients, the 50-60 people who each week, in five-or-less minutes per session, month after month, year after year, share their lives with me. Admittedly, not all of these acquaintances pan

out. Some people disappear. Some become burdensome and I've had to learn how to limit the attention I give them. But I've gained much from my clients, above and beyond the already-powerful experience of treating them and witnessing the progression of their lives. I've heard anecdotes — learned about Doug's parrot who, wanting to hide, would respond to "Where's Birdie?" with "Birdie's not here!". I've had a client connect me to a cellist who lives near me — now we play Friday evening early-music regularly. I've acquired catch-phrases that clients originated: "dinosaur points" for points near the lower brain; "that's why we travel in herds" for the wisdom of more heads being better than one; "you can only treat one patient at a time" for a reminder to slow down and not get flustered. I've traded books with clients, reading suggestions, horrible puns, fruits and vegetables, plant cuttings, jams and honey, recipes, artwork, and many, many expressions of gratitude. I've come to know people, many whose life experiences are vastly different from my own. I've come to respect how much I cannot know of the struggles people face.

Community Acupuncture is a social business. It's been said that our society is forgetting how to be civil. Letters to Dear Abby and Miss Manners gripe of people who text through dinner dates, who don't say thanks, who engage in road rage and display varying degrees of rudeness, selfishness, and obliviousness to their fellow beings. Community Acupuncture offers all of us --clients, punks, volunteers-- an opportunity to practice being social without the burden of much conversation. It may be just a bunch of people sleeping in recliners, but it is also a place for us to be together, to acknowledge human suffering, and to value ourselves and each other for whatever we bring to maintaining a calm shared space. Community Acupuncture demonstrates the pleasure to be had in simple, caring, well-defined social interactions. In a world that can be seen as full of fear, uncertainty, stress, anxiety, and polarity, Community Acupuncture helps re-weave the social fabric.

Making an Organization in Stages

Be a solo practitioner

(and build a big enough patient base to support yourself)

Be a solo practitioner plus volunteers

(see sections on starting a nonprofit/working with volunteers)

Create a corporation, employ yourself and your first acupuncturist and/or receptionist. (At this stage your organization could be in various forms: partnership, PC, C, S or a nonprofit, but mostly it requires that you and any other acupuncturists are actively working to grow/maintain a big enough shared patient base to support the employees of the corporation)

Create an organizational/management structure so that you can work together effectively

Employ enough other people that there are other managers besides you, and together you can employ more people without anybody losing their mind — that's the goal, anyway. (This stage requires a very large, stable, shared patient base)

Build structures and create succession plans for long-term sustainability: develop other leaders so that your organization can survive without you. (So all those patients will have someone to see when you retire)

Spine, Heart, Brain

All the happy advantages of working together instead of alone notwithstanding, a leader and/or creator of a community acupuncture organization can expect to find themselves between a rock and a hard place. On the one hand, you've got punks who are primed to see any organization as something to rebel against first and ask questions later; and on the other, you've got capitalism itself, broadcasting the message to everybody all the time that the only things worth having are things that individuals can own and also, the sole point of every human activity is private accumulation. Punking makes rebels, but capitalism makes consumers, and in a lot of ways consumers are harder to deal with.

At one point I summed up my acupuncture organizing history like this:

The acupuncture profession is a harsh environment: it can't support much life, especially not in complex forms. Professionally, we're the equivalent of a bunch of single-celled organisms competing for scarce nutrients, bumping around, unable to do much for each other. When we first started reaching out to other acupuncturists, we could have focused on trying to help a few people be the biggest, best amoeba in their corner of the wasteland (the way most acupuncture business coaches do) but that's not what we wanted. The point of making a cooperative was to organize. To become a complex organism. To have a spine and a heart and a brain, not just a mouth.

It's a sad fact of living in capitalism that a lot of acupuncturists, including community acupuncturists, can't imagine being anything other than a mouth. This attitude keeps us from creating healthy, beneficial organizations in the first place and can also contribute to tearing down the few that manage to exist. It's easy to be a mouth demanding that an organization give you what you want; it's much harder to be part of evolving in the direction of more complexity in order to create what you and others need, so you can share it — including with people who have fewer resources than you do.

The point of doing the difficult work of growing a spine, a heart and a brain (like the point of punking, period) is inclusion. If you're a leader, you're going to experience a lot of frustration in dealing with the mouths. Mouths are not really interested in the big picture of inclusion, no matter what they say; they're interested in getting what they want for themselves in a particular moment. In my experience, the only thing that makes all the frustration worth it is knowing how much inclusion you've managed to create in spite of them.

Both rebels and consumers take organizations for granted in different ways. Sometimes naïveté about what organizations can and can't do, rather than malice or entitlement, is the problem. There's not much to be done about malice or entitlement other than fending them off as best you can, but my hope is that this workbook might be able to help punks with our collective naïveté about organizations.

Looking back on my own history of being, at different times, both a rebel and a consumer, what those experiences had in common was disempowerment. It didn't occur to me that I could learn enough about organizations that I could make what I needed; I thought that if the world wasn't offering me what I wanted, my only options were to rage or to look harder for somebody else who might provide it. For a long time, I didn't recognize my other option, the one that wasn't a variant on rock-throwing or shopping. One of the most empowering things that ever happened to me was learning, by trial and error, how to *build*. I can testify that learning to understand, create, and maintain organizations can help you feel infinitely more empowered with respect to organizations, as opposed to attacking them or constantly looking around for some better prefabricated version. That's the essence of the DIY punk spirit — *make your own*.

In reaction to all that, because I *hated* the professional acupuncture culture, I landed hard on the other end of the continuum and put organizations and collective projects ahead of my own well-being in a variety of ways that weren't healthy. Full disclosure: this was only partly unconscious. Some of the sacrifices I made in this area were conscious and strategic. I've explained my reasoning in the past by using the Stone Soup folktale, which is about a trickster who figures out the only way he can get what he needs is by setting up a situation in which otherwise completely individualistic people end up enthusiastically supporting a collective project without realizing they're doing it. I knew that what I needed was something much larger than my own individual practice. I also knew that this larger something would benefit a lot of other people as much as it benefited me. But I was in no position to ask for cooperation. I wouldn't have gotten it, because at that time nobody saw the point in anything other than individual practices and individual gain. (See above: capitalism, consumers, mouths.)

Understanding this part of my life backwards, I can see now that sustainable organizations require give and take. To some degree, everybody has to make sacrifices, and everybody has to see their organization as a long-term investment that's worth it. Before I understood that, and for a long time, I made sacrifices that were way out of proportion because in my assessment, that's what it was going to take to get the collective aspect of community acupuncture off the ground. I still don't know if it was a mistake; I did eventually figure out that I couldn't keep doing it. I realized I was trying to maintain organizations by taking responsibility for them in ways that nobody else wanted to. This was my Stone Soup strategy of trying to provide the benefits of organizations to people who were (at best) ambivalent about organizations, in the hope that they would eventually come around. It worked on a lot of levels, but it also sucked, for me.

Like other kinds of work, leadership and organizational management go better when they have certain kinds of boundaries and support. A really basic one is the acknowledgement that you're doing it. However, as any small business owner knows, leadership and organizational management can easily become a category of invisible labor in addition to whatever work the business itself does (providing acupuncture in a community clinic, providing coffee in a coffee shop, etc.).

I had this problem in spades, because I was dealing with more than one organization at a time, and also, I was trying to use the Stone Soup strategy to get (and keep) people involved. In hindsight, I was trying to accomplish certain functions on behalf of the organizations I worked for (see section on Leadership as a Job): overseeing the big picture, carefully making order out of chaos, coordinating other people's efforts, defining goals and results, articulating and amplifying values, and communicating constantly — without drawing attention to any of it. For the most part, nobody including me recognized that this was work (see section on Barriers to Leadership). More

problematically, I made it look like part of my social life, as if doing all these things was somehow a subset of hanging out with people (I really thought it was).

I didn't recognize that this arrangement did in fact suck (for me) until I started thinking seriously about succession planning, at which point it became obvious that I was doing a huge amount of unrecognized, uncompensated, and unprotected work. When the answer to the question of, "Who would want to do what I do?" is "Nobody in their right mind", it's time to make some changes.

This problem, of course, isn't unique to community acupuncture; it's common in a lot of nonprofit organizations. And even in community acupuncture, it wasn't unique to me; I've seen a lot of my comrades come to the realization that they're wearing themselves out trying to maintain organizations for people who are (at best) ambivalent about organizations. They've created jobs for punks whose response is to throw rocks at them (or to take those jobs for granted in ways that are actually worse than overt rock-throwing). Obviously, *that's* not sustainable.

So, in the search for a healthy balance of mutuality, for the sweet spot between too much selfishness and too much selflessness, I thought I'd try something that's worked for me in the past: making a zine. And so here we are.

If I had to do the whole thing over, instead of taking on more than my share of responsibility for organizations and trying to lead without anybody noticing (so that they wouldn't get mad at me) (they did anyway), I would have some very clear conversations with potential cooperators. I would try to spell out in detail: this is what you might gain from being part of an organization; this is what you might have to contribute and/or give up; and this is what it would take, in general, to create and sustain this organization in terms of leadership and infrastructure. Everybody clear on all that? Everybody in? If so, great, let's proceed to becoming a complex organism together! Spine, heart, brain, here we go! If not, okay; I guess we're all going to keep being amoebas.

I couldn't have had that conversation, though, not just because nobody would have listened to me, but because back then I didn't understand anything about organizations or leadership, either. And not just because I was primed by our society to be alternately a rebel and a consumer, but because the topic of leadership and organizations is wrapped in layers of mystification, and there's little or no permission to experiment and learn by trial and error. I didn't know what I didn't know, and every time I indicated how much I didn't know, it felt to me like somebody was waiting to pounce on me for being stupid. There was no opening to say, I really want something other than being an amoeba, but I'm clueless, where do I start?

Rebels and Consumers

It would have helped me quite a bit, at the beginning of my acupuncture career, if I'd been more conscious of my attitude toward organizations. Being unconscious meant that sometimes I was a rebel, sometimes I was a consumer, and all of the time I was disempowered. Until I started building organizations myself, I had no real idea how they worked, which led to taking them for granted.

Acupuncture school was a good example. I didn't think much about my acupuncture school as an institution, outside of being frustrated that it wasn't what I wanted. A lot of people have similar, negative consumer experiences with acupuncture school; it's a "buyer beware" situation and there are a lot of us who probably should have beware-d instead of enrolled. I was alienated and disengaged, and I didn't know what to do about everything I didn't like about my school other than to disengage further.

Much later, I was a raging rebel in relationship to my acupuncture school. I'd moved from disengagement to an active desire to see it burn. At one (low) point, I found out that my acupuncture school had mentioned my clinic during a recruitment session as an example of alumni success, and I actually called up the poor employee who was responsible for the recruitment sessions and hissed that the only reason I was successful was that I'd taken everything I'd learned at that school and had done the opposite, *so don't you dare use me in your promotions.*

Whether I felt that acupuncture school was a purchase I shouldn't have made, or whether I felt it was a villain intentionally oppressing me, I didn't really get that it was a structure built by humans for certain purposes. All that labor was invisible to me. Obviously, my school's purposes clashed with mine (or I wouldn't have been so mad), but the point is, the school only existed because somebody built it, following certain blueprints. If the blueprints had been different, my experience would have been different. It took decades to recognize that what mattered was the blueprints.

I had a similar trajectory with acupuncture professional organizations. Initially I ignored them because they didn't seem to offer anything that I, personally, wanted; later I spent a lot of time throwing rocks and issuing demands. Here's what was consistent, though: nothing I did as a consumer OR a rebel made any difference or did any good — not just for the organizations in question, but for me.

I wish there had been somebody who could have sat me down and said:

Hey, I get that you're unhappy with all this. But relating to organizations is not like ordering pizza; what YOU really want is unfortunately not something that anybody is going to be able to deliver to you in a nice warm box. Even unsatisfying organizations like the ones you're complaining about are really, really hard to create and maintain,

particularly in the acupuncture profession. So, let's save your energy and consider your options.

Are you getting *anything* from this organization that's useful to you? A paycheck, a place to practice, access to patients, information about what other practitioners are doing and thinking (even if you don't agree with it), information about laws and regulations (even if you'd rather not know)? What, *exactly*, do you want that this organization isn't giving you? (If you want it, you're going to have to spell it out in detail.) Support to practice in a way that makes sense to you, *truthful* information about how other practitioners are really doing, a community you'd want to be part of? Is there anything you'd be willing to give, or give up, in order to get more of what you want? Your time, your energy, your attention and focus to learn how this organization works (which right now you think is really boring)? How much of those things are you willing to give?

And finally, are you up for considering what would happen if this organization and others like it didn't exist at all (because that's always a possibility in the acupuncture profession)? Would you be willing to help build a replacement? Do you have a reasonable idea of how much work that involves? And does that prospect change your calculations about what you're getting and what you want from the organization that you're currently unhappy with?

All organizations involve trade-offs and transactions. Organizations don't just fall from the sky to give you what you want or to give you a hard time; they take shape as a result of human effort; they are the way they are for human reasons. If you really want something different than what's available right now, you'll need to participate in the trade-offs and the transactions — *if* it's worth it to you.

You can only participate effectively if you can (at least sort of) read the blueprints and make the invisible labor visible.

Worksheet

- Pick an acupuncture organization that you're unhappy with, that you'd like to change. Possible candidates: acupuncture state associations, acupuncture national associations, your acupuncture school, a clinic you hope to work for, etc.
- List (in detail) what you're getting now from participating in that organization.
- List (in detail) what you're not getting now from that organization that you want.
- Describe, in detail, the structures that make that organization possible and who is responsible for maintaining them. Include:
 - Cash flow (how does the organization make its money?)
 - Communication (internal and external communication structures)
 - Accountability (to what people or organizations is the organization accountable? who is responsible for making sure work gets done, are they staff or volunteers, etc.?)
 - Decision-making (how does this happen in this particular organization? who makes the decisions and how?)
 - Organizational infrastructure and bureaucratic paper trail (these go together: what structures does this organization have to maintain in order to exist? a board, bylaws, board meetings, paperwork for employees, etc.)
- Describe, in detail, how the structures of the organization would have to change in order to give you what you want.
- Would you be willing to do the work to make that possible? If not, why not? If you think someone else could do that work, what practical incentive would they have to do it?

Demystification

In that way, leadership reminds me of practicing acupuncture. When I graduated from acupuncture school, I had logged a lot of hours in the classroom, but I had very little idea of how to build a practice and particularly, how to help ordinary people benefit from acupuncture. Communication and setting reasonable expectations for treatment — both for myself and for my patients — were two of the biggest challenges. It took me years to figure out that communication and reasonable expectations were actually more important to my patients' healing process than my technical skill as an acupuncturist. My ability to explain and coordinate treatments in partnership with my patients actually mattered more than where I put the needles; the part of treatment that I did in coordination with them was more important than the part I did by myself.

In acupuncture school I developed a vague idea that acupuncturists were either amazing wizards or pathetic hacks, and the amazing wizards didn't want to give away their secrets. That was a destructive, disempowering binary to believe in, since it didn't leave much room for gradual improvement or trial and error (the only way I seem to learn). In hindsight, I'd say that I was taken in by some strategic mystification by other people in the acupuncture profession: some senior practitioners didn't want the basics to be clear to newcomers, because mystifying acupuncture bolstered their authority. Demystifying my job so that I could actually get better at it took a long time and a lot of effort, but it was one of the best things I did for myself.

Leadership is like that. As far as I can tell, it's similar to acupuncture in that it contains some genuinely magical, inexplicable elements — but it also depends on some very basic practices and good habits that any practitioner can cultivate if they want to. But, like acupuncture, it's very hard to learn to do if you think you're supposed to be innately amazing at it. It's hard to learn if you can't ask what seem like stupid questions and you can't make mistakes. Come to think of it, it's hard to learn to do anything if you have to pretend you already know.

This zine/workbook is written at the level I needed when I was starting out; it's the guide to building organizations I wished I'd had. It assumes no prior understanding of organizations or leadership. My goal is to go over the basics, as I laboriously put them together over the years, without shaming anybody for what they don't already know. My hope is that if anybody else needs to have a conversation with potential cooperators about putting together (or remodeling) an organization, that conversation can happen relatively easily and without anybody feeling stupid.

A Few Barriers to Leadership (and Entrepreneurship)

But first, let's talk about barriers to building organizations. It can't be said too often, or in too many different ways, that our society has some very dysfunctional ideas about leadership, which overlap with dysfunctional ideas about entrepreneurship. These ideas converge in the default image of a leader/entrepreneur: a white, upper middle class, able-bodied, confident-looking man wearing a suit, probably standing in front of his framed MBA diploma – the leader/entrepreneur as a veritable icon of social power.

The irony, of course, is that most entrepreneurs don't match that image. Countless successful small businesses are created by women, people of color, immigrants, people with disabilities, and people with histories of incarceration – people who build businesses because they might not have a choice about it. All of these entrepreneurs are practicing leadership that is at least as real as the Silicon Valley version, and also a lot more difficult.

If you're a punk, odds are high that you don't match that image either. Part of the mystification of leadership is tying it vaguely to image and identity, as opposed to breaking it down into concrete skills that anyone can practice. It's worthwhile to take inventory of any internalized barriers to leadership you might have, and particularly, to be conscious of ways that you've been told by society you're not qualified to lead based on ways you don't match the image.

I don't match the image with respect to my class background, my gender, or my mental health. Obviously, your mileage will vary depending on who you are, but in case it's useful, here are some examples of the kind of unpacking of barriers that I'm recommending.

Class

As someone who comes from a working class/working poor family, I've had to sort out:

A deep inherent suspicion of anything related to management, managers, or “bosses” in any form.

Difficulty with recognizing abstract work, like management or organizational planning, as “real work” because it's not work you do with your hands.

An inability to see myself in a leadership role/ fear of being an authority figure.

Fear/avoidance of bureaucracy (for some people this can include bureaucracy being an actual trauma trigger, which makes it very difficult to even think about it).

Difficulty with long term planning in general/difficulty with getting out of survival mode.

Feeling even more isolated in a leadership role than leaders do already.

My inability to take my own organizational work seriously has created major practical difficulties in my life; there were long stretches where I was working around the clock and simultaneously feeling guilty that I wasn't really working, because everything I was doing was administrative. (Because my job didn't involve actual physical labor, I felt like I was getting away with something.) Once I recognized this pattern of thinking, I was embarrassed that I was still having so many internal conflicts related to my class background, what was the matter with me that I couldn't just get over it, I've been wrestling with this stuff for decades etc., etc. So, it was actually a relief to get confirmation that the conflict wasn't all in my head, which happened one day in the context of a conversation with a friend, Gary.

Gary was much more than a casual friend; he had been one of the most enthusiastic supporters of my clinic for a decade-plus as well as a trusted adviser. Gary was a proud union member of the International Brotherhood of Boilermakers. He also led an outlaw motorcycle club. When I ran into him one day at his daughter's coffeehouse, he commented that he hadn't seen me working in the clinic lately. No, I said regretfully, I've got a lot on my plate with organizational stuff, I hardly have any time to treat people. Gary chuckled. And winked. Oh right, he said, So you're "supervising."

I think he actually used air quotes — and Gary was not the kind of guy you'd expect to use air quotes. It was good-natured teasing, but the message was loud and clear: organizational work isn't work. Even Gary, who did a lot of organizational work himself (biker gangs don't exactly run themselves) didn't really believe in it. Okay, I thought, I'm not imagining this, it's an actual working-class problem. Since then, I've recognized other punks with working class or working poor backgrounds who had similar blind spots when it came to organizations.

I've seen my comrades:

Be intimidated by, or knee-jerk resistant to, setting up basic organizational structures that would make everybody's lives easier in the long run

Assume that they should be able to do everything related to their jobs completely by themselves (expecting no support and overvaluing self-sufficiency)

Struggle with impostor syndrome in management roles, which can be expressed by overcompensating and being overly responsible/perfectionistic with management tasks and/or overly deferential to people they're trying to manage

Fear a loss of identity as hard-working, down-to-earth people if they do anything other than direct service work, and

Fear the judgement of their families/communities for “getting above themselves” (this fear is definitely based in reality; working class people can be quick to smack each other down).

Gender

There’s a lot of literature out there about how female-identified people aren’t socialized or encouraged to lead. One punk I know, summed up her experience like this:

I thought, I have proven myself to be good in leadership roles so why am I still questioning my leadership abilities and then I remembered oh yeah. I have been told since childhood by one person or another, either a parent (my Dad) or a partner (ex-husband) that I am not smart enough, good enough, driven enough and every other enough to be a leader. Why would anyone take me seriously. Childhood trauma led me to believe that I am not worth much so why would anyone listen to me. It’s a work in progress that sometimes keeps me from speaking up or jumping into a leadership role because there is always a little voice there saying who do you think you are? What do you have to offer? You're not worth listening to. It’s still an invisible wall I run into sometimes and then think hey what was that and then remember oh yeah, it’s that stupid little voice that’s always tearing me down. It has gotten easier to tell that voice to fuck off, but it still trips me on my way by. ⁴

Abelism

See above: a lot of us have trauma histories that affect us physically, mentally, and emotionally. In addition to having had personal experiences that undermined our confidence, we’re affected by ableism in our society in general. Ableism is responsible for defining a very narrow range of what is “normal” for bodies and minds, and then stigmatizing anything that falls outside it. If you’re not even “normal”, ableism says, how could you be a leader? Not to mention all the practical issues that people with disabilities encounter in navigating a world that isn’t built for them, which makes extra work for them on top of the work of building and maintaining an organization.

As someone who has had to put a lot of energy into managing their mental health and can never take it for granted, I know I’m not imagining this barrier either. Oddly enough, though, all the skills I developed to manage my mental health – particularly

⁴ Haley Merritt, WCA punk.

learning how not to get overwhelmed in various situations – have come in very handy as a leader and an entrepreneur.

To sum up, it's important to identify any way in which our profoundly unequal society might have persuaded you that you're not leadership material, because this is society's problem, not yours. Organizational management and leadership are just work, pure and simple, that somebody has to do, and that somebody might as well be you.

Part 2: Blueprints

Can't Punk Forever?

Here's a compelling reason to investigate organizational management: because you might not be able to be a punk forever, but you also might not want to leave community acupuncture.

If there's one thing that you learn by working in a community acupuncture clinic, it's that humans are amazing in their diversity. Some people can barely feel dozens of needles and strong stimulation, while others jump out of their skin at the most delicate insertion. Some people's problems respond instantly and seemingly miraculously to acupuncture, while others' stubbornly resist the punk's best efforts. Some people will talk your ear off if you let them, others communicate (barely) in grunts. One of the things that keeps punking interesting is that you never know what you're going to discover when you roll up your chair to a new person.

This principle also applies to punks: despite being a very small, self-selected group, punks vary tremendously as individuals. One of the other things that keeps punking interesting is that it's an art form; you can subtly modify your style to fit your personality and needs. Humans grow and change over time, and most punks need to make changes in their clinical work to reflect their personal development. Because our little subculture is so new, however, we don't have a lot of information about how long most people can stay in the punking role, period; all we know right now is: like everything else, it varies.

I know one acupuncturist who decided that punking was not for her after doing it for three hours; after her first busy shift she basically threw up her hands and walked out of the clinic, never to return. I know another who feels like he's finally getting the hang of it after twenty years of high-volume practice. Some people approach punking as one phase of their careers; others can't imagine doing anything else, ever. Some might want to punk for the rest of their lives, but that's just not in the cards — for any of a number of reasons.

Most of us heard stories in acupuncture school about people who were actively practicing into old age, like Ing Hay. If we were lucky, we actually met senior acupuncturists who were still working past what would normally be considered retirement age because they were so good at what they did. When I went to acupuncture school, I hoped I would be one of those people. It was disconcerting to realize that wasn't going to happen. Instead I fit a profile more common to people in professions like social work: after about twenty years of direct service, I needed to transition into a non-clinical work. Post-punk, to use my friend Chris Rogers' (of Wasatch Community Acupuncture) term.

It's complicated, because needing to make a transition is not necessarily the same thing as burnout, though they can be related. The World Health Organization (WHO) defines

occupational burnout as a syndrome resulting from chronic work-related stress, with symptoms characterized by "feelings of energy depletion or exhaustion; increased mental distance from one's job, or feelings of negativism or cynicism related to one's job; and reduced professional efficacy."⁵ Punking is such a demanding job that in order to do it at *all*, never mind forever, you have to develop sophisticated stress management techniques and systems. If those techniques and systems don't seem to be working, the first order of business is to try to fix them, rather than get out of punking! Burnout is associated with chronic frustration, and punking was designed not to be frustrating, so if it is, it's worth trying to untangle what's gone wrong.⁶

When I stopped punking, 21 years after graduating from acupuncture school, I wasn't negative or cynical or frustrated about the punk role; it just felt like it wasn't a good fit anymore. I used to describe the punk role as something I put on like carefully tailored work clothes; by the time I stopped punking, it felt like the sleeves were too tight and the pants were too long and every time I turned around, I was tripping over what used to fit like my own skin.

Something to consider doing if you also find yourself post-punk for whatever reason: become a punk administrator. If you love community acupuncture passionately, but for whatever reason, the work of needling people isn't for you anymore, you could use your experience of punking to create or fill an organizational support role. (Leadership is an organizational support role.)

Here's a list (likely incomplete) of what being a punk and being a post-punk administrator have in common:

- Both require concentration and focused attention. You can't be absent-minded while you're doing either.
- Both are all about systems. Punking reflects a set of clinical systems (see Praxis 1) while administrating reflects another set of systems, behind the scenes, that support the clinical systems.
- Both require finding a pace and a rhythm for activity so that you don't get overwhelmed.
- Both are fundamentally about responding to other people's needs.

⁵ https://en.wikipedia.org/wiki/Occupational_burnout

⁶ see Harvard Business Review's take on the difference between stress and burnout: https://getpocket.com/explore/item/why-some-people-get-burned-out-and-others-don-t?utm_source=pocket-newtab

- Both demand an order of operations. It's simpler and more repetitive when you're punking (tend to chairs, pull needles, treat patients, repeat). Administrating sometimes requires figuring out the order of operations before you can proceed. For example: We need a new manual for the volunteer program. Who needs to be in the meeting we'll have to hold in order to figure out what goes in it? If we can't all attend at once, how will we make sure everybody gets the same information and has the chance to give input? Could we do the whole process by email, why or why not? Who is ultimately responsible for making sure that we end up with a manual at the end of the process? Etc.

For both punking and administrating, the work itself might not look like much but when it's effective, it's suddenly magical. There you were, just sitting on your stool putting needles into somebody's arm, and suddenly your patient's quality of life is so much better that they're crying with gratitude while they're telling you how they can now sleep through the night without pain. There you were, just pecking away on your laptop and/or sitting in a meeting room talking to people, and suddenly the punks working at your clinic get a well-deserved raise.

For both punking and administrating, you have to have good boundaries and not take things personally. (Because humans.) Learning how to have good boundaries and take things less personally will also make you happier in general, however, so this requirement is actually a gift.

Here's a list (also likely incomplete) of what being a punk and being a post-punk administrator do NOT have in common:

- Administrating is not working with your hands. Punking is so satisfyingly tactile, and needles are in my opinion the coolest of tools, tiny and sleek and flying through your fingers. I mean, I like my laptop, but I don't feel about it the way I'll probably always feel about needles.
- Administrating demands more from your left brain. One of the beauties of punking is that it can be done from the left brain, the right brain, and usually both, in some unique individual combination. I loved feeling parts of my left brain switch off when I walked into the clinic, allowing intuition and instinct to take over. I definitely use both intuition and instinct as an administrator, but my left brain never shuts up entirely, the way it used to.
- Administrating requires holding a big picture in your head at all times while you work. For punks, if your clinic is set up right, in most ways, the clinic will hold the big picture for you while you scoot around on your rolling stool, banishing headaches and back pain and otherwise doing work that you can immediately feel good about.

- Administrating involves being more directive and less purely responsive. Punking involves a lot of going with the flow when the clinic is busy and showing up for people in the moment, over and over. Administrating requires a lot more stepping back and asking yourself, what's going on and what do I do about it?

The relationships you have as an administrator are similarly more directive and less responsive than the relationships you have as a punk. In short, you have to be able to oversee, guide, and evaluate other people's work, which is utterly different from the supportive, nonjudgmental approach punks take with their patients. This was probably the aspect that made it most necessary for me to let go of punking; it became too hard to toggle between those two modes of being with people.

A difficult aspect of managing people, for punks, is that punks aren't oriented towards managing — they're oriented towards *helping*. This can create problems, particularly when a punk moves from being a solo practitioner to working with volunteers and/or employees. It's taken years for some of us at WCA to make the transition from looking at everyone from the perspective of, "how can I make this person's life easier?" to "what does the organization need from this person, and is that also something that they have to give us?" A lot of the mistakes we made were related to trying to take care of people at the expense of accountability. The boundaries between practitioners and patients are not the same as the boundaries between employers and employees, or between coworkers. It can get even more confusing in a community acupuncture clinic when everybody's also still getting treated in the clinic, which of course they are; most of us need acupuncture.

As noted elsewhere, for a punk, maintaining a patient base is a lot like being the nucleus at the center of a little electron cloud of patients. Being an administrator, especially a leader, is also like that, except the bonds holding your electrons in place are qualitatively different. They should have more to do with a shared sense of mission than with one person helping the other; they should reflect a clear distribution of responsibilities; and they should be able to be written about in documents like job descriptions. If they don't and they can't, you might be heading for problems with boundaries with your employees, coworkers, or volunteers.

In other words, some of the best parts of the punking job overlap with being an administrator, but unfortunately not all of them do.

So, if I loved being a punk (and I did) why am I happy now as a post-punk administrator?

I started out as a punk with the simplest social container — me as a sole proprietor, stuffing my receipts into an envelope. My clinic grew over time, through various

configurations (see WCA Case Study) but there's never been a time, over the last eighteen years, that I haven't been taking care of my clinic in some form, in addition to being a punk. I could imagine not punking, but I couldn't imagine not taking care of my clinic (I did try to imagine this). And because my clinic had grown to the point where it really needed more organizational support, and I was already stretched uncomfortably between the two roles, it was a relief to let go of punking and focus on administration.

One of the parts of punking that I loved most was the feeling of lowering barriers for people to be able to get acupuncture. After a certain number of years, it was clear that I could lower more barriers, for more people, as an administrator.

But if I could have figured out how to do some punking along with administrating, I would have gladly kept punking, at least a little bit, because I still miss the parts that are sweet and irreplaceable. Any amount of punking requires a lot of energy, probably more if you're an introvert (I am) and at the end of the day, I just couldn't keep up with the demands of both roles, particularly when punking was no longer the perfect fit that it used to be. Your mileage may vary; you might be able to extend your punking career by mixing it up with some elements of administration. If not, though, I'm here to testify that if punking is the best job in the world, post-punk administration might be the next best.

To be an administrator, you have to have an organization to administrate, so let's look at the basics of organizations.

Components of Organizations

Cash Flow

How does an organization make money?

Oddly enough, this isn't where most people start when they describe how organizations work, but it's the only way I've ever been able to make sense of them. An organization's foundation is its cash flow. All organizations are *shaped* by their cash flow. If you don't understand the cash flow, you don't understand the organization.

But wait, you say, what about all-volunteer organizations? What about organizations where money isn't the point? All-volunteer organizations are, in a sense, a special case that we'll get to later in more detail (see Volunteers section). If an organization isn't *earning* money, then the money required to support its infrastructure is probably coming from donors who are *giving* it money, and just like all other organizations, that cash flow of donations will shape how the organization runs. If there really isn't any money at all involved, then the donors' time and energy takes the place of cash flow. Either way, you'll have to take into account donors' desires, intentions, preferences, and motivation. Organizational infrastructure is never free; if the organization can't pay people to do the work of maintaining the infrastructure, somebody has to want to do it for free (see more under Volunteers and Motivation).

Call it cash flow or call it "resources"; either way, you can't ignore your organization's fuel.

If there's no flow of resources, and the organization isn't doing anything, you won't have an organization for long. I'd argue that if there's no flow of resources and the organization isn't doing anything; you never really had an organization in the first place; what you had is an *idea* for an organization. (I've known a number of acupuncture organizations that fit this profile.) Ideas are cheap and endlessly flexible; you can *imagine* an organization doing anything you want! Actually doing it in the real world, however, and taking into account your resources and results, is a whole different story.

This is a good place to acknowledge a crucial point about how community acupuncture clinics make money. In order to earn money, clinics have to attract patients. However, many punks have learned the hard way that *clinics* don't attract patients, *practitioners* attract patients. Successful punks need to be proficient in a special one-to-one, relationship-oriented, human type of magic, in order to be able to build a patient base. Hanging a shingle doesn't do anything other than give you a place to start doing the real work, and no amount of marketing can overcome your deficiencies in relationship building. A successful clinic is essentially the sum of its successful punks' ability to build relationships with patients. No relationship building = no cash flow.

Something important to ask about an organization is, who is ultimately responsible for creating the cash flow? In a community acupuncture clinic, it's the punks. Which means that you can't really create jobs for punks from *the outside*; all punks have to create their own jobs from *the inside*, by doing the invisible work of attracting patients. Employers of punks have learned this painful lesson over and over. So, in terms of a community clinic, you can't understand how it functions as an organization if you can't understand punking, which is how it generates the money to *be* an organization. And a clinic won't be an effective organization if it isn't structured to support the needs of its punks, who are the foundation of its cash flow. On the other hand, the punks need to understand the needs of the organization, or the whole thing will fall apart.

A somewhat less foundational issue with cash flow, but still extremely important, is that it has to be tracked very carefully within an organization. This tracking, which can include not just monitoring but recording activities like bookkeeping, is somebody's job. See below under "Accountability" and "Bureaucratic Paper Trail".

Most people who live in capitalism learn to be afraid of money in different ways, to different degrees, so working with cash flow will require you to unlearn at least some of your fear. You don't have to do it all at once (that probably isn't even possible). I've been unlearning mine in small increments over a couple of decades; the process involved a lot of trial and error and it hasn't looked like anybody else's process. I started out completely intimidated by money, which meant I was also completely intimidated by cash flow, but I gradually got to the point where I was relatively relaxed about being responsible for an organization that earns and spends about a million dollars a year. Cash flows in, cash flows out, and at this point I feel okay about it.

In hindsight I just wore down my fear a little at a time, on the sandpaper of the day to day operations of a small business. It helped me to recognize that a lot of people are intimidated by everything related to cash flow, including the process of tracking it (bookkeeping is scary at first!). Find people who will cheer you on and answer your questions without implying that they're stupid questions (and the corollary, avoid people who treat you like you just fell off the turnip truck or who make you feel more fearful, even when/especially when they present themselves as experts). That goes for all the other components, too.

Communication

How do people within organizations connect with each other, give and receive information, give and receive support, argue and problem-solve? What channels do those elements move through?

Because organizations are tools to coordinate human effort, they can't exist without communication any more than they can exist without cash flow. For a punk it's a natural metaphor: both cash flow and communication are like qi — you can't have a living organization without them. If you don't understand how the communication happens, if you can't identify the pathways, you don't understand the organization. Communication isn't something *extra*, something nice to have but not really necessary, any more than cash flow is. Communication, like cash flow, is foundational.

Channels of communication take shape in all kinds of ways in organizations: formal and informal; written, spoken and nonverbal; functional and dysfunctional. I didn't understand for a long time that making sure communication happens is work, real work; it requires effort, focus, and practice; and someone has to be responsible for it. Also, most people undervalue it to a spectacular degree. In trying to understand (or to build) an organization, it's always useful to ask, who is communicating with whom, and how are they doing it? Is there enough communication to keep things running smoothly? Is there enough communication to steer the organization in a good direction? How much communication you need depends in part on how many people you have in the organization; more people = more communication work.

In a community acupuncture clinic, punks communicate with patients about clinic procedures and treatment recommendations; punks (if there are more than one of them) communicate with each other to coordinate treatments; owners/managers communicate with employees, and vice versa, about everything related to running the clinic. The quality of communication often directly affects the organization's cash flow.

Organizational infrastructure (more about this in a minute) is a form of communication.

Communication can be intimidating just like cash flow can be intimidating. It cheered me up greatly when I figured out that every organization has problems with communication. (Reading management books helped with that perspective.) Nobody is 100% successful at it; communication is supposed to be a constant work in progress. All you can really do, at any stage of organizational development, is keep plugging away at it. It gets easier with practice.

Accountability

Merriam-Webster defines accountability as “an obligation or willingness to accept responsibility or to account for one's actions.”

Accountability in an organization determines who has to explain themselves to whom, about what, and under what circumstances. For community acupuncture clinics, the most basic level of accountability is represented by the punks' acupuncture licenses. Part of the reason why any state regulates acupuncture is to give patients someone to complain to (the licensing body) about acupuncturists, and to give acupuncturists

someone to answer to (the licensing body). If something goes really wrong in the acupuncturist-patient relationship, for example the time an acupuncturist punched his patient in the face because she was angry and yelling at him because she'd found out he was dating lots of other patients besides her — in addition to getting arrested for assault, that acupuncturist had to explain his behavior to his state licensing body. (This happened in Oregon, and yes, they did yank his license.) That's not the level of accountability where most of us, thankfully, want to hang out.

The next most basic level of accountability is tracking cash flow so that the organization can fulfill its tax and reporting obligations to the government. As noted above, this represents work for somebody. Accountability, in general, isn't free; it's work; it requires time and effort. (If you expect accountability from anyone, you need to be prepared to describe in detail *how* that accountability happens, as well as possibly building the structures from scratch if they're not there.)

More fun kinds of accountability have to do with an organization defining its goals and what success means to it, and then determining what role each person in the organization plays in reaching those goals and achieving success. Accountability has to do with what people in the organization expect from each other, what they depend on from each other, and how all that gets communicated. The more transparent this is to everyone, the better. It's pointless to hold anybody accountable for expectations that are unreasonable, or expectations they didn't know about. Accountability only works when expectations are reasonable, clearly spelled out, and agreed to BEFORE anybody starts calling anybody else accountable. Navigating issues of accountability has a lot in common with navigating boundaries; it's a learning curve for most of us.

Organizational infrastructure (more about that later) is one big, overarching way that accountability gets enacted, via lines of communication and reporting. Accountability can also be expressed via tools like performance evaluations. And accountability can be as simple as one coworker saying to another, hey, did you do that thing you said you'd do?

Unfortunately, the word "accountability" can also get thrown around in threatening and arbitrary ways, which can contribute to people feeling intimidated by it. I got a lot out of the book *Crucial Conversations* by Patterson and Grenny,⁷ because it framed the topic in ways that made it much easier to understand. One of the points in the book is that accountability doesn't work unless people feel relatively safe.

⁷ Joseph Grenny, Al Switzler, Kerry Patterson, David H. Maxfield, Ron McMillan. *Crucial Conversations: Tools for Talking about Broken Promises, Violated Expectations, and Bad Behavior*. June 2013. Publisher: McGraw-Hill Education

Accountability in an organization can also be translated as who gets to complain to whom, and about what? Because if you have more than one person involved in any enterprise, there will be complaining. (I wish I had realized this earlier.) I don't know anybody who likes to be randomly complained at, out of the blue, so it's important for accountability structures to be transparent and without surprises.

Decision-making

An organization navigating its life in the world requires decision-making. The first aspect of decision-making takes the form of a mission statement: why does this organization exist? Sometimes mission statements exist without being articulated (it was years and years before WCA had a written mission statement; for a long time, the "why" lived in my head). It's better for an organization if the mission statement is written out, clear, and easily shared.

Now that we have one, WCA's mission statement is:

Working Class Acupuncture provides low-cost acupuncture to the community through a cooperative, grassroots, financially self-sustaining model. Our goal is to offer people as much acupuncture as they want, in support of whatever goals they have, so that they can use it in whatever way works best for them.

Our mission statement represents a set of decisions that determine or eliminate other decisions. For example, we decided we wanted our organization to be self-sustaining financially, rather than relying on donations from wealthy benefactors, and as a result, WCA doesn't qualify for most conventional grants even though we're a 501c3 nonprofit. Deciding to be one thing prevents us from being another thing. Similarly, being financially self-sustaining means that we run on a shoestring budget, so our administrative processes have to be very lean, another factor making us a poor fit for conventional grants. WCA can't function outside of the fundamental decisions we've made about who we are and how we do things, even when people want us to.

All organizations will have pre-made decisions like that; also, small decisions that need to get made in order to keep their operations running; and big decisions that can influence their trajectory and future. Creating an organization requires determining who gets to make decisions, how, and why. If you're a sole proprietor, this part is easy — you make all the decisions! If there's even one person besides you involved in your organization, however, you'll benefit from having clear decision-making structures.

Decision-making can be centralized or dispersed, but what it can't be, is separated from responsibility, because that never leads anywhere good. People in organizations often want to participate in decision-making because they correctly recognize it as a form of power; however, to paraphrase Spiderman, it's not a good idea to separate power from responsibility. Many organizational problems arise from people making decisions whose

consequences they're not responsible for (this could be considered a subset of accountability).

The system of sociocracy (more about this later) was a big help to me in learning not to be intimidated by the processes and structures of decision-making (see Resources section), in part because it creates routines for decision-making, and routines make anything less scary. If you don't like sociocracy, anything else that creates routines would probably be helpful. Decision-making is also something that gets much easier with practice.

Organizational Infrastructure

Organizations are social containers, you could say, like baskets are containers. There are different kinds of baskets: big baskets and small baskets, nonprofit baskets and for-profit baskets, very simple baskets and very elaborate baskets. At the end of the day, though, their job is to hold something: the work of the organization. If you look at a basket, it has a structure that somebody wove into place: base, spokes, strips, handle. If you make an organization, that's what you're doing: weaving the components into place to make a secure container that will hold what you want it to hold.

Organizational infrastructure blends elements of all of the components listed above: cash flow, communication, accountability, and decision-making. Those components take form in things like mission statements; goals and objectives; job descriptions; teams and meeting schedules for teams; manuals; schedules, deadlines and evaluations. (When I was a sole proprietor, to the degree that organizational infrastructure existed at all, like the mission statement, it lived in my head and nowhere else.) The components stabilize each other the way parts of a basket stabilize each other. Organizational infrastructure has to change and evolve if the organization grows in size or if the organization's functions change; what works at one point in an organization's life might not work at another.

For me, the more I could identify the individual components and what they did, and see how they fit together, the less intimidating organizational infrastructure became. It doesn't have to be created by a person wearing a fancy suit, with an MBA degree, in order to be real. Organizational infrastructure is good and useful to the degree that it works, and holds what it's supposed to hold, and doesn't break — just like a basket.

Bureaucratic Paper Trail

All of the prior elements of an organization have to exist within a form that's recognizable to the larger society. If you look closely at how exactly this happens, what you'll see is, essentially, a paper trail: a bunch of documents. For example, the organizational infrastructure is represented by an organizational chart or diagram, which is part of the paper trail; tracking cash flow is represented by bookkeeping

records and completed tax forms, which are part of the paper trail; hiring people is represented by employee files and HR paperwork, which are part of the paper trail. All organizations have to create and maintain a paper trail; the degree of complexity varies widely, but at the end of the day, it's all just paper (or the digital equivalent).

For a sole proprietor who is running their practice on a shoestring, the paper trail is simply the sole proprietor's personal taxes (in the US, that would be Schedule C, Income from Self-Employment). In addition to taxes, more complex organization will need documents like bylaws, budgets, and manuals (operations manuals, employee manuals, board manuals, the list can go on and on).

Like many people from working class/working poor backgrounds, I was intensely intimidated by bureaucracy. The more insecure your socioeconomic position in capitalism, the more likely you've experienced bureaucracy as something to fear, something that can be used as a weapon against you, something that might take away the little that you have. It took me a long time to feel competent in relationship to bureaucracy, and a key to that competence was recognizing that making a paper trail isn't rocket science; mostly it requires patience, determination, and a willingness to create and organize documents.

Actually, it's not that much different than making zines. I had an advantage here because I've always liked to write (it's been a hobby since I learned how in kindergarten). If you're afraid of writing (many people are!), you'll have more to overcome in this department. I promise it's possible, though — you don't have to be Herman Melville to become good enough at the kind of writing that makes an organization. Like communication in general, establishing a paper trail mostly requires plugging away at it. The people who will look at your paper trail mostly want to see that it's *there*; they don't need it to be perfect or stylistically beautiful.

One more thing: a paper trail needs a secure, well-organized place to live. These days, that mostly means cloud storage, though you'll also probably need at least one filing cabinet for everything that's on paper.

To Sum Up

Leadership means being able to understand your organization's cash flow, communication, accountability, decision-making, organizational infrastructure, and paper trail — and to do what's needed to adjust any of them if they develop problems, or if they just need to change because your organization has changed.

And by "problems", I mean that they are in some way interfering with your organization fulfilling its mission — because a leader's job is to make sure that the organization fulfills its mission.

Leadership as a Job

Let's look at that in more detail. After about fifteen years of leading, in one capacity or another within a small business context, here's my take on what the leadership job actually involves, minus all the mystification. Leadership, like punking, is a technical job that you can learn how to do.

Have a clue (harder than it sounds)

This comes from the book *Reframing Organizations: Artistry, Choice, and Leadership*⁸ (which someone who actually went to school for organizational management told me is a sort of bible for leadership development). The authors make a point early on of saying that a leader's primary job is to grasp what's going on in their organization (so that they can respond appropriately), and when leaders fail, it's usually because they got it wrong. This makes a lot of sense if you realize that most people in organizations are not paying attention to the big picture, they're just doing their own jobs, keeping their heads down and trusting that somebody else will take care of the rest. Having a clue about what's going on with the organization as a whole is not easy to do, because even a small organization can have a lot of moving parts, and not all of what's happening is out in plain sight.

Then there's the issue of how the organization is doing in relationship to its environment. Having a clue about this, and how difficult it is to do, is summed up by the often-quoted "wrong jungle" metaphor:

You can quickly grasp the important difference between (managers and leaders) if you envision a group of producers cutting their way through the jungle with machetes. They're the producers, the problem solvers. They're cutting through the undergrowth, clearing it out. The managers are behind them, sharpening their machetes, writing policy and procedure manuals, holding muscle development programs, bringing in improved technologies and setting up working schedules and compensation programs for machete wielders. The leader is the one who climbs the tallest tree, surveys the entire situation, and yells, "Wrong jungle!"⁹

One thing about having a clue is that you can't schedule it on your calendar or plug it into a productivity app. Leaders can feel like they're supposed to look busy (I've struggled with this, and it was helpful to hear from other people in leadership positions that they do too) but the problem with being busy is that it can interfere with having a

⁸ Lee G. Bolman, Terrence E. Deal. *Reframing Organizations. Artistry, Choice, and Leadership*. 2017 Jossey-Bass.

⁹ Covey, Stephen R. *The 7 Habits of Highly Effective People*. Free Press. 1981. Page 101

clue. A cluelessly busy person in a leadership position can actually make things worse for everybody else in the organization. Doing too much, at the wrong time, in the wrong way, can result in unnecessary work for other people and bog down the whole operation in ways that you'll have to spend time and effort cleaning up later. Usually leaders have plenty to do without trying to look busy, but it's frustrating that the most important part of the job, and sometimes the hardest work, is often nothing you can point to.

I used to walk my dog next to an open field with long grass. Sometimes when I'd look up, I'd see a hawk hanging in midair over the field, beating its wings every once in a while, waiting for a mouse to move in the grass. "Riding the thermals!" another dog walker told me cheerfully. Some parts of leadership remind me of riding the thermals. It didn't look like the hawk was doing much of anything, but there's a lot of effort involved in getting up there, staying up there, and paying attention to the entire field.

Make order out of chaos (carefully)

This is closely related to having a clue; in fact, making order out of chaos is pretty much having a clue + making decisions + communicating decisions. Leaders have to look at confusing or unmanageable situations and break them down into clear and manageable parts so that everybody else can work on them. But you have to have a clue even about this, especially in organizations with shoestring budgets like community acupuncture clinics, because TOO much order is a) unaffordable, and b) fascism.

A subset of making order out of chaos is navigating danger and uncertainty. A crucial part of the leader's job is to hold the center for the organization when things get scary, while simultaneously making practical decisions that need to get made. This aspect of the leadership job has been in the global spotlight during the coronavirus crisis, particularly for government officials; it's an aspect that people really miss when it's not happening (particularly when the consequences are life and death). If you're leading, you need to be able to not only tolerate uncertainty (unfortunately, many people can't) but to approach it calmly and pragmatically so that you can figure out what to do with it.

A punk doesn't panic when a patient shows up to the clinic in a lot of pain, because pain is a punk's *job*. Similarly, a leader doesn't panic when an organization is facing uncertainty, because uncertainty is a leader's job. There's some overlap in emotional tone: punking involves learning how to stay centered in the presence of stressed-out people, which is what leaders also need to do. Managing a busy treatment room is not completely unlike managing a crisis, though a busy treatment room is of course much nicer to be in.

Also, making order out of chaos doesn't mean micromanagement, which isn't leadership; that's more like a way for a leader to be unproductively busy at the expense of actually leading. There's an art to feeling out the difference between too much order

and too little order, which makes it one of the frustratingly mystical aspects of the leader's job — but in my experience, you can also get better at it through trial and error.

Micromanagement *feels* draining, both for the people being micromanaged and for you if you're doing it. Getting the right balance of just enough order so that everyone knows what they're doing and feels good about it, on the other hand, *feels* satisfying, and also gives everybody more energy to get their work done. I think you just have to practice finding the sweet spot: if it feels like too much order (and your efforts are making you tired!), step back, and if it feels like too little, step in. Make incremental adjustments. Repeat as needed until things are humming along, meaning you're doing the leadership job but you're *not* doing, and you're not getting in the way of, anybody *else's* job. It's kind of like a fractal of the punking job: when you punk, you're not trying to do your patients' healing *for* them.

Build and manage teams

This is a subset of having a clue and making order out of chaos, and it's my absolute favorite part of leadership. I love teams. Whole books have been written about team building (see Resources section) so I won't try to replicate all that information here. What I wished I had known when I was starting out: teams are how administrative work gets done. Teams are a support structure for communication, accountability, and decision-making. Teams facilitate transparency. Teams are how you grow more leaders.

But most of all, when teams are in good shape, they're *fun*. I never played sports in school, so I didn't discover this until I was trying to run a business. Now, my first approach to solving an organizational problem is to think about how to either build a new team or use an existing team to tackle it.

No, I didn't have any training in this area; I learned how to build and manage teams by building and managing teams. You start by asking a bunch of people if they want to work with you, and you take it from there. (Tip: for this to work, you have to be good to work with.) See more below.

Coordinate other people's efforts; get the best out of other people

This is a subset of building and managing teams. As noted above, most people in an organization are preoccupied with their own jobs; a leader looks at everybody else's jobs and how they fit together. Once you have enough people in an organization, there needs to be somebody responsible for coordination or problems will develop. These can show up within teams as well as between teams.

I was resistant to coordination for a long time (see above: working-class suspicion of everything related to managers; it just didn't seem like "real work") and I only came

around reluctantly after having some bad experiences. Specifically, with coworkers being so territorial about their own jobs that they interfered with other people's. For whatever reason, I've never been territorial about my own work, so I didn't understand that it's a thing. (It's a BIG thing.) There are other situations, of course, that could point out the need for coordination, but here's what it took for me to get it: seeing repeated examples of how it's not uncommon for people to focus only on what they perceive as best for their individual jobs, no matter what the consequences for the organization. In my experience, the territorial person might feel perfectly justified, or be unconscious of their own attitude; the person or people on the receiving end of the territorial behavior (which can escalate to outright hostility) can't do anything about it, because anything they do will be met with more resistance. The organization will suffer unless someone, who is responsible for coordination, steps in to sort out the problem, including checking the territorial person as needed. (Checking the territorial person also requires having and using authority — which I was also resistant to.)

This type of coordinating problem might not just be a person with a territorial attitude; the problem could also be structural. For example: a task that needs to get done but that isn't in anybody's job description, so it's slipping through the cracks and having bad effects on everyone; a decision-making process that's gotten bogged down somehow so that people's work is being held up; or a failure of communication caused by a glitch in the way a team gets its information. Regardless, though, there has to be someone whose job it is to step in and unclog the vacuum, so to speak, because the vacuum can't unclog itself. And the longer there's a clog, the more frustrating it is for people affected by it, and then you'll have a whole other problem related to morale and effectiveness. Without leadership, organizational clogs just grind everybody down. A big part of a leader's job is to help everybody else feel and *be* effective — which means removing obstacles to their effectiveness.

In order to do this well, a leader has to want to get the best out of everyone. A lot of people enjoy negativity on some level; they like drama and conflict and they like it when other people fail so that they can look like they're doing well by comparison. A leader can't be one of those people themselves, and also should be careful about getting too close to those people, because negativity is contagious. A leader has to *genuinely* want everybody else in the organization to succeed and to thrive. A leader's job is to find ways to get the best out of people, including creating opportunities for people to do what they're really good at and minimizing opportunities for people to fail in areas where they're not so good. That's all part of coordination.

And when someone, for whatever reason, can't or won't be coordinated, or despite the leader's best efforts, can't do good work, it's the leader's job to protect the organization by firing them. This is possibly the least fun part of the job, but someone absolutely must be responsible for it.

Define goals and results

This is another subset of building and managing teams, because what's a team if not a group of people working together to achieve a goal? It's also one of the most important subsets of having a clue, because it's the leader's job to make sure that the goals and results are the right ones for the organization.

In my experience, having the right goals is a big factor in building a healthy, productive team that's also fun to work with. I don't think you need "team building" exercises if you're making progress towards goals that everyone feels good about, and you're getting results together that you can collectively be proud of. The feeling of doing work that actually moves an organization forward is powerful glue. This means that your chosen goals have to be achievable, and your desired results have to be possible — which might seem like a no-brainer but sadly is not.

I've noticed that a lot of acupuncture organizations are not great at choosing achievable goals. I remember one organization, now basically defunct, who announced in 2011 that, according to their strategic plan, acupuncture would be fully integrated into the US healthcare system by 2014. I think they felt that any lesser goal would be unworthy of them somehow — but it was definitely a sign (a ten-foot-tall neon sign, with blinking red lights) that their leaders didn't have a clue. If it's a leader's job to help everybody else both feel and *be* effective, a leader won't damage their team by letting them bang their heads against a wall of unachievable goals. A leader has to take good care of their team's valuable time, energy, and motivation, which means not wasting those things on goals that might sound good (especially to people outside the organization!) but are way out of reach.

Speaking of unachievable goals, "everybody gets along all the time" or "everybody gets everything they want" are a couple of examples that new leaders, in particular, need to be wary of. My friend Jade Fang put it this way: a healthy organization spends at least as much time saying no as it spends saying yes. In order to make the kind of tangible progress towards goals that keeps everybody motivated, the organization has to be discerning and selective about where its energy goes. The corollary: leaders have to be prepared to disappoint people by saying, "no, we can't do that."

There's an important relationship between defining goals and results and maintaining a bureaucratic paper trail: it's a good idea to *write your goals down* so that everybody is clear about what they are. I used to be very resistant to things like mission statements, goals and objectives (see above: working-class fear of bureaucracy); now I love them, the clearer and more concrete the better. Because they *work*. The process of defining your goals and objectives forces you to look at whether they're achievable, and what it will take for you to make them real. Yes, it takes time and energy to get them down in writing, but it will save your organization from wasting time and energy later on.

Articulate and amplify values

An important aspect of the punk's job in the clinic is setting the tone or being responsible for "the vibe" of their shift. For patients to get acupuncture in a group setting and enjoy it, the vibe of the room needs to feel soothing and centering, even when it's very busy and the punk is racing around trying to stay on schedule. If a punk can't set the tone, the vibe will feel chaotic and/or unfocused, and patients won't like it and won't come back. The analogy in leadership is that it's the leader's job to articulate and amplify the values of the organization in order to establish "the vibe" for everybody else. Just like having a clue, this function often looks like the leader not doing anything in particular — but it requires clarity, focus, and effort.

For example, an important organizational value in my world is transparency. On a personal level I need it; I'm not happy and not effective in an organizational setting where it's missing. Since I'm in a leadership position, my job is to articulate transparency as a value and then notice where our operations have it and where they don't. In decision-making processes, it's my job to push for more transparent choices and push against less transparent ones. And it's also my job to explain what I'm doing and why, including saying dorky things like, "Well, I like option A because it feels more transparent to me and transparency is important to us as an organization" even when I feel like everybody else is rolling their eyes and thinking, "yeah yeah yeah we *know*, because you've said that like a million *times*".

Lots of people in an organization should be able to express and advocate for the organization's values, but the leader really has to do it, and especially has to do it in situations where other people won't (possibly because they don't want to sound like dorks?). That goes double when there might be a price to pay for sticking to the organization's values; the leader then has to be prepared to explain to everybody else why it's worth it even though it's inconvenient.

Communicate, communicate, communicate — about goals, values, and results

Here's a quote from the book *The Hard Thing About Hard Things*¹⁰:

"Perhaps the CEO's most important operational responsibility is designing and implementing the communication architecture for her company."

This is a nice neat summation of something it took me more than a decade to figure out: communication is a core aspect of the leader's job. Starting about 2002, I spent way too

¹⁰ Horowitz, Ben. *The Hard Thing About Hard Things: Building a Business When There Are No Easy Answers*. Published March 4th, 2014 by Harper Business

much time being mad that people didn't "get it", with "it" being any number of things related to the community acupuncture model — in part because I just didn't know that it was my job to explain, well, everything.

It wasn't until we had an acupuncture school that I finally realized (with a lot of help from a mentor) that I could never assume that people knew or understood ANYTHING, no matter how basic. If I wanted or expected people to do anything, it had to be crystal clear and ideally, I should document, somehow, that I had communicated it. Leadership requires way more *intentional* communication than normal life does (and I'm saying this as someone who has lots of planets in Gemini — sometimes I literally can't stop talking).

It's not possible to coordinate people's efforts in an organization without some kind of "communication architecture", which includes not just the communicating the leader does as an individual, but also making sure that other people are also communicating in consistent, documentable ways. It's also not possible to move the organization towards its goals without this. Lack of communication is something that people in organizations really like to complain about, and lots of people will do so endlessly without making any effort to fix the problem; the leader can't be one of those people. The leader's job is to make the communication architecture actually *work*. A leader has to continually establish and maintain channels of communication.

In general, the amount of communication that a leader is responsible for represents a huge amount of time and energy. And it's not something extra; if that level of communication doesn't get done, it leads to all kinds of organizational problems. (See more in the next section under Meetings and How Not to Hate Them.)

The Ongoing

Finally, a leader's job is to keep doing all of these functions, together, over time.

A leader has to oversee the organization's progress toward its goals, which means identifying and removing obstacles and making course corrections as needed. A leader has to keep an eye on the big picture and then communicate in order to help everyone else see it too. A leader is accountable for delivering results and also has to help everyone else be accountable (this includes sharing credit for results). A leader has to plan for the future and manage timelines in order to keep the organization's progress on track.

As noted above, it's the leader's overarching job to make sure the organization fulfills its mission. This means making sure that the organization's operations are tied to its mission and tightening the knots as needed, over and over, forever.

Sustainability

I know I just said “finally” but there’s one more thing — a leader’s job includes making sure the leader’s job is sustainable. Nobody else is going to do that — nobody else can! Because if the leader’s job isn’t sustainable, the organization is going to be in a lot of trouble, sooner or later. This is still a big growth curve for me, so I don’t yet have a lot to report, but learning more about leadership sustainability is a high priority.

Part 3: Blueprints - More Detail

Meetings (and How Not to Hate Them)

Early in WCA's life as an organization, I was very resistant to meetings. I thought they were a bureaucratic waste of time, so for the most part, we didn't have any. Meetings are probably the area in which I've made the biggest reversal (like teams, now I love them) but I understand why a lot of people approach them with dread: they can be awful.

Meetings remind me of asparagus, actually. My introduction to asparagus happened sometime in the 1970's, in my grandmother's house. She hated to cook, so a lot of meals came from cans. The first time I tasted canned asparagus, it was colorless, mushy, stringy, and above all, slimy — I was astonished that anybody actually ate it. (I think I spit it out.) I was reintroduced to asparagus in college — *fresh* asparagus, bought from an outdoor market, cooked on a tiny apartment stove by a person I had a crush on, who showed me how to snap the ends of the spears off to get rid of the stringy parts, and scoop the spears out of the sauté pan when they were radiantly green and still crunchy. *That* asparagus was an entirely different story.

Meetings can be nourishing, stimulating, and possibly even delicious when handled properly.

As everybody knows, I'm into fractals — and I think meetings are organizational fractals, or tiny self-similar versions of the whole. If your organization's meetings are well planned, well structured, productive, and energizing, chances are your organization feels that way overall. But for that to be true, somebody needs to know what they're doing. Good meetings don't happen by accident. Specifically, I think in order to have good meetings, you have to be clear about both the purpose and the structure — because meetings without purpose and structure are worse than canned asparagus.

I learned a lot about meetings from sociocracy (see more in the Resources section). Sociocratic meetings are very structured; they have certain elements that together add up to a kind of ritual that, in my experience, is very effective in creating the meeting equivalent of fresh asparagus. The purpose of meetings, in sociocracy, is to be a container for decision-making, and the structure facilitates that.

Meetings are also a container for interpersonal connection, which make them an important part of team building. What meetings aren't, necessarily, is a space for information-sharing, because there are lots of other ways to do that (though connection and decision-making can involve some information-sharing). There's a reason you can buy a coffee mug that says, "I survived another meeting that should have been an email". In a sense, meetings are a subset of communication, but they're a very particular subset with particular limitations and requirements. They can't be a kind of kitchen sink for communication; they have to be approached with intention. In general, I've learned to love meetings because when they're done right, they're not a waste of time at all: they're crucial to an organization's ability to make progress on its goals.

We borrowed and improvised freely from sociocracy, so this is WCA's version of meeting structure:

1. Opening Round

This is the very first thing: everyone in the room checks in briefly. People don't have to say anything more than, "I'm okay" if they don't want to — "I'm okay" is totally fine! — but it's a place for people to share things like, "I'm wiped out because my kid is sick and we were both up all night" or "I'm preoccupied because my partner's mom is moving in with us" or "I have a migraine, I'm just barely hanging in here". These check ins are important information because they help everyone have realistic expectations of people's energy in the meeting. For example, they know not to take it personally if the person with the migraine keeps wincing. The opening round also serves a kind of ritual function: even if people just say, "I'm okay", it's a way for people to officially join the meeting, to remind everyone that we're all humans, and to start the meeting on a note of intentionality.

When I go to meetings where there's no opening round, I feel noticeably less connected and less confident. As in, is everybody truly ready to be there? Have they really consented to spending an hour of their lives this way, or are they quietly cursing about it? How do I know? Is that person wincing because what I'm saying is painfully stupid, or do they have a headache? Etc.

2. Agree to the agenda

Meetings must have agendas. A meeting that has no agreed upon agenda is almost guaranteed to waste everybody's time, and even if it doesn't, to stress people out by making them *wonder* if it's going to waste their time. In more formal meetings, each item should have an estimated amount of time allotted to it, and there should be a timekeeper to make sure the meeting stays on course. At WCA, our informal meetings are usually just a list sent around by email ahead of time. An agenda is like a promise: there's a reason for everybody to be here, we're going to get something accomplished, and here's a general idea of what that might be. (If you have no idea what you might accomplish in a meeting, you probably shouldn't have it at all.) If people don't agree to the agenda, the first order of business is making an agenda that everyone *can* agree to.

3. Proposals

Sociocracy introduced us to the value of proposals as a way to encourage problem-solving. If someone wants to change how an organization does something, the first step is for them to bring a proposal to a meeting. This can apply to small issues (for example: "I don't like the pens at the front desk, I propose we buy a different brand") and large ones (for example: "I would like us to have a new policy and procedure regarding

employee evaluations, here's my proposal for what that could look like"). Proposals are a great way to cut down on time wasted in discussions that go nowhere and on unproductive venting; they're a nice neat method for moving things forward.

The expectation that people will bring proposals can be a polite (structural) way of saying, "put up or shut up", which is something leaders need to say sometimes. It sounds like, "Okay, I hear that you're unhappy with X, how about you bring us a proposal to do it differently?" Having the ability to reroute complaining towards solutions in a consistent, methodical way can be crucial to protecting everyone's energy from people who enjoy complaining for its own sake, or who just like to hear themselves talk. If meetings are mostly about complaining, people will hate them, and if people hate meetings, you'll have all kinds of other problems.

4. Reaction rounds

Either as part of a discussion, or as a response to a proposal, reaction rounds are very useful. They're just what they sound like; the facilitator announces, "Reaction round!" and everyone in the meeting takes a minute or so to give their quick reaction. For example, "I like this proposal but I have concerns A, B, and C" or "I need some time to think about it before I could say yes or no, could we revisit it next week?" or "I love this proposal so much I want to marry it." Reaction rounds make sure that everyone gets to respond, and everyone *knows* they'll get to respond without being interrupted, which generally makes them more able to listen to everyone else. The reaction round isn't finished until everyone has spoken. At that point, the facilitator can steer the discussion towards issues raised in the reaction round and keep repeating the process until agreement has been reached.

5. Consent

"Consent" is foundational to sociocracy, and it's a major reason that sociocratic meetings are effective. Consent is a modified version of consensus (more about this in the Resources section). With regard to meetings, consent represents a goal: *everyone in the meeting agreeing on a course of action that they can live with*. Not necessarily a perfect course of action that they love, or would choose above all others, but one that they can live with in part because everyone else can live with it too. A successful proposal is one that everyone in the meeting can consent to; one sociocracy resource describes it as "good enough for now and safe enough to try".¹¹ A function of reaction rounds is to flush out obstacles to consent, which have to be discussed in order to be worked through. A proposal will often get modified in a meeting, based on everyone's reactions, until it becomes something that everyone can live with, even if they don't love

¹¹ <https://patterns.sociocracy30.org/consent-decision-making.html>

it. Giving consent in a meeting means that any objections you had have been addressed to the point that they're not bothering you anymore.

I love the concept of consent because it recognizes that a team doesn't have to make perfect decisions — they just need to make decisions that are good enough to keep the organization moving forward. Consent helps make room for trial and error; it allows you to try things, together. It gives people the option to say, "I'm not sure about your idea, but I can live with trying it out, to see if it works" as opposed to "No, I disagree." Consent is a structured way to release people from unhelpful binaries like agreement/disagreement and right/wrong.

6. Closing Round

In sociocracy, the closing round is supposed to be something of a mini evaluation of the meeting, where people can comment about what they liked, didn't like, or want to do differently next time. At WCA it rarely gets used that way and is mostly a ritual function — but it's still a useful ritual function. Generally, when the facilitator announces, "Closing round", people will just say something like "thanks, good meeting" or (referencing a brief check in during the opening round) "I'm okay — I'm *still* okay, despite this meeting". Closing round is often an opportunity for jokes.

As a leader, I like to use closing rounds to express appreciation for something that I think went well about the meeting (see above: articulating and amplifying values, also, sounding like a dork). For example, "I really appreciate how honest everybody was, that was a challenging discussion about X but I think we did well with it". Closing rounds, even when they're perfunctory or silly, are a way to end on an intentional note.

To Sum Up

Sociocratic meetings have a variety of structural elements that work together to keep them from getting tedious, bogged down, or draining. If you don't use sociocracy, you'll need some other structure to keep meetings productive and energizing. Leaders are ultimately responsible for their organization having at least a template for good meetings. Obviously a leader isn't going to be in every meeting that happens in an organization, even a small one, so they can't be responsible for how every meeting goes — but if there's a pattern of ineffective or unpleasant meetings throughout an organization, that's something the leader should have a clue about, and deal with. The rhythm of meetings provides a rhythm for the administrative life of the organization; leaders need to take care of that rhythm. (You don't want to screw around with your organization's *heartbeat*.)

Meetings are also a good way to incrementally practice leadership; they're a nice, time-limited exercise in coordinating a group of people. Running a meeting has some fractal similarities to running an organization. You need to have a clue about what's happening

in the meeting; you need to carefully bring order out of potential chaos; you need to get the best out of people in whatever amount of time you have with them; and you need to have a goal for the meeting (expressed ahead of time via the agenda). Running a meeting requires taking responsibility for it; you want your meetings to be good experiences for people, or at the very least, not something they hate.

See Appendices for examples of meeting agendas.

Scaffolding – Or How to Use a Very Bureaucratic Paper Trail to Build an Organization

I learned a lot about organizations from, oddly enough, making an acupuncture school. (See WCA Case Study for more details.) The creation of POCA Tech represented the purest of punk impulses: lots of people practicing community acupuncture *hated* their own acupuncture school experiences and were determined to DIY an alternative. This iconoclastic, anti-authoritarian, subversive, experimental urge brought us face to face with the opposite polarity: big state and national bureaucracies. Acupuncture as a profession, as well as educational institutions in general, are highly regulated in the U.S. Because our goal was for our students to be able to get licenses and practice legally (see above: inclusion, making it possible for more people to get acupuncture) we had put ourselves in the position of DIY'ing our own educational bureaucracy in order to be compliant with all the regulations.

Ironically, that collision of punking and bureaucracy was amazingly fruitful on multiple levels. The one I want to focus on here is, how building a bureaucracy from scratch can be a template for understanding and building organizations in general.

We got very lucky in that every state department of education is different, and Oregon's happens to be a fortuitous combination of benign, user-friendly, and rigorous. Oregon *wants* more private career schools; it doesn't want to regulate them out of existence or discourage people from making new ones. The Oregon Department of Education's target demographic is the welder working out of his garage who wakes up one morning and decides to train other welders. The educational bureaucrats in Oregon didn't expect us to know what we were doing, thank God, and they gave us what I started calling our "paint by numbers" plan for the school. In order to get a license from the state to run a school, you have to fill out an application, and Oregon's application for private career schools told us *exactly* what to do. In theory the state licensing process was a kind of gatekeeping, but in reality, it was more like coaching. (In hindsight, this was a transformative experience for me in relating to bureaucracy: receiving help led to believing I could work with it, without freaking out.)

Right on the heels of getting a state license, we had to start interacting with the national regulatory bureaucracy for acupuncture schools, the Accreditation Commission for Acupuncture and Oriental Medicine, which we had reason to be much more wary of. Long story short, in our experience ACAOM also turned out to be benign, user-friendly, and rigorous; they also had a template for us to follow. We took the bureaucratic paper trail that they needed to see in order to approve our school and worked backward to build our organization. Here's ACAOM's list of what you need, organizationally, to have an accreditable school:

- Mission

- Strategic plan
- Outcomes/goals and objectives
- Systems to stay in compliance with regulations (state and national)
- A governance structure: a board, bylaws, and meeting minutes
- An administrative structure, described by an organizational chart, job descriptions, HR/employment paperwork, and some method for accountability (employee evaluations)
- A system for tracking and planning the school's finances
- A system for evaluations: in other words, how do we know what we're doing is working? How do we know students are learning what we want them to learn, and how do we know the school is doing what we want it to do?
- Manuals (employee manuals, student manuals, operations manuals — if the school requires something to get done, how it gets done should be written down in a manual)
- Published communications (descriptions of the school itself such as a catalog and a website), and
- Grievance policies and other kinds of internal checks and balances.

That's it. It's a lot, but it's not infinite. It turned out to be doable and even interesting to build our own bureaucracy.

At the beginning of the process, I genuinely didn't understand why we needed a mission statement, goals and objectives, systems for evaluations, grievance policies or anything else on that list. I saw the requirements as a series of stupid hoops to jump through in order to get what I really wanted, which was well-trained community acupuncturists who weren't drowning in student loan debt. I was nervous that becoming bureaucratically compliant meant losing our punk soul.

What it actually did was force us to be creative and thoughtful about organizational infrastructure. Making an educational institution out of very limited resources — basically, building a school in our garage — required us to understand organizational infrastructure in a way that was different, and clearer, than if we had just been able to throw money at the process.

One thing I wish I'd known when I was worried about losing our soul: if you take any given group of people, the default setting is for them to go in as many different directions as there are individuals. The default setting is for them to prioritize their own short-term interests instead of the group's collective long-term interests. This is *normal*. If you want anything *different* from that (such as, people striving together towards a common goal, actually having fun in the process, and maybe even achieving it), you are going to have to *work* for it. It doesn't just happen without effort. Amazingly enough, a

bureaucratic scaffold is a way for you to make that effort more manageable and sustainable over the long term. And a bureaucratic scaffold isn't inherently oppressive (though many punks relate to it that way) — it can actually be a fairly neutral way of coordinating people's efforts.

One of the most important elements of the school that came out of our reverse-engineered paper trail was the decision to use sociocracy as an organizational framework for the school. (See more in the Resources section.) This wouldn't have occurred to us, though, if the ACAOM paperwork hadn't specified that we needed to describe exactly how employees of the school communicated, made decisions, and were evaluated. It turned out that sociocracy was what would make it possible to a) run the school on a shoestring budget and 2) maintain the intimidating paper trail we needed in order to stay in compliance with state and national regulators. Sociocracy turned out to be an elegant solution.

If you're not building an acupuncture school in your garage, the template can still be helpful. Depending on the scale and purpose of your organization, you might need more or less of these elements. Here are the different parts of the template mapped to the basic components of organizations.

Mission Statement

This is the foundation of your accountability and decision-making; when it's written clearly, it's like a compass for your organization.

Strategic Plan

Same; also, helpful in creating timelines for organizational work, because strategic plans usually cover 3-5 years.

Outcomes/goals and objectives

These are like the mission plan except broken down into measurable pieces. They're a straightforward kind of accountability: did we do these things? Can we measure how we did them? (Pro tip: if you can't measure it, ask yourself if it's achievable, and if so, how do you know?)

Systems to stay in compliance with regulations (local, state and national)

These help your organization stay accountable in the most fundamental ways (laws!). If you don't stay accountable in these ways, you're not going to get to do much else. Also, it is surprisingly easy to break certain kinds of laws without meaning to or even realizing

you did it (this is not like throwing a Molotov¹² cocktail or other fun punk transgressions — this is more like not filling out a form that you didn't know existed).

A governance structure: a board, bylaws, and meeting minutes

A board of directors is all about decision-making; bylaws and meeting minutes are about the paper trail. (See more under Governance.)

An administrative structure, described by an organizational chart, job descriptions, HR/employment paperwork, and some method for accountability (employee evaluations)

Administrative structure represents communication, accountability, decision-making, organizational infrastructure, and the paper trail. A nice clean efficient administrative structure makes everyone's life better.

A system for tracking and planning the school's finances

Cash flow + paper trail: fundamental to having an organization at all.

A system for evaluations

This is about accountability and communication — and also about helping leaders to have a clue. Evaluations can let you know if your organization is drifting off course.

Manuals

Some communication *needs* to happen in writing. Manuals are a much better option than you endlessly talking to one person at a time, having to say the same things over and over when they ask you how to do something, until you finally fall down in an exhausted heap.

Published communications (descriptions of the school itself such as a catalog and a website)

This is just communication to the world at large. See above: it's a much better option than answering the same question over and over in a thousand individual emails. Our school website, for example, has multiple FAQ sections, because we have learned that FAQs save us a lot of time and effort.

¹² I'm telling you, Molotov cocktails work. Anytime I had a problem, and I threw a Molotov cocktail, boom! Right away, I had a different problem. — Jason Mendoza, *The Good Place*.

Grievance policies and other kinds of internal checks and balances.

Grievance policies are useful for when people miscommunicate (which they will) or otherwise make a mistake in some aspect of the organization. They represent a chance to go back and fix mistakes or clarify miscommunications. It's much better to figure out procedures for how to do that before you're dealing with a bunch of upset people; using a grievance policy gives everyone something to do instead of just being upset, but they only work if they're put in place before you need them. (Pro tip: humans make mistakes. It's good to plan for that the way you plan for any inevitability.)

A bureaucratic scaffold is a form of investment. It doesn't make any sense to build one of these unless you're really committed to your organization, because it's so much work and the results are only reaped over the long haul. If you are really committed, though, having a bureaucratic scaffold will make your organization infinitely more sustainable.

The trick, of course, is to be able to make this investment on a shoestring budget. Conventional organizations pay people to build a bureaucratic scaffold. Punk organizations can't.

Volunteers

Part of what oriented me towards thinking my clinic belonged to the community rather than to me as an individual was the overwhelming generosity of my patients. From the beginning they wanted to support the clinic and so they offered to help in different ways: getting us featured on a morning television show, building bike racks, scavenging recliners, doing repairs – I was amazed at the range of skill sets that people deployed on the clinic's behalf. I was pretty sure that most small business owners weren't getting this kind of support.

And so, I've always thought that there was a role for volunteers in building and sustaining community acupuncture clinics. Beyond the material benefits, volunteers can bring a whole new dimension to a clinic/organization. Having a volunteer program is a tangible way to invite the community in and amplify a sense of solidarity.

Making use of all that potential goodwill, though, requires organization. Here are some things to keep in mind about using volunteers, some of which I learned the hard way.

Volunteers Are Not Free Labor

Volunteers are like a case study in demonstrating the need for organizational structures and planning. You can get by without much structure if your volunteers are only doing one-off projects that they can largely manage themselves: for example, the volunteer who built our bike racks didn't need much direction from us, apart from where to bolt them down. If you're going to integrate volunteers into your operations in any kind of ongoing way, though, you have to expect to manage them – which requires time, effort, and resources.

Volunteers are also like a case study in the need for boundaries. Patients often volunteer for a clinic because they feel a strong sense of investment, which is wonderful, but it can also be a double-edged sword. In a small organization, with a few individuals wearing many hats, boundaries can get blurry and people can get confused about their roles. Many community acupuncture clinics have experienced what happens when patient volunteers get over-invested and feel that their donated labor means that they can also give direction to the punks/clinic owners: it can turn into a big, dramatic mess very quickly. More than one clinic owner has said something to the effect of, "Wait, when did this previously helpful volunteer turn into my angry ex-girlfriend/my critical parent/my worst interpersonal nightmare?"

The only way I know to ward off this kind of drama is with structure (aka bureaucracy). Before you invite people in to help your organization, you need to have clear expectations for their roles and yours, and these expectations need to be communicated in a way that involves a paper trail. (See more under legality of volunteers.) At the least this involves a volunteer agreement, a confidentiality agreement, a job description, and

some orientation materials. I'd advocate for more, though: a volunteer application, an interview process, a volunteer manual that everyone has to read and sign off on, and a plan for how to let volunteers go when the relationship is not working out. (See appendix for WCA's volunteer materials.)

I realize this sounds like a lot. I would never have sprung for so much paperwork when I was afraid of bureaucracy so I understand if it seems overwhelming; but if you can put it in place systematically, a little at a time, it'll actually be a lot less overwhelming than dealing with a suddenly obnoxious or even hostile volunteer. I swear, bureaucracy has some benign qualities, and one of the most important for community acupuncture clinics is that it can actually prevent certain kinds of blowups and meltdowns that can otherwise be destructive and exhausting.

Volunteers and Leadership

These are the aspects of leadership that apply to working with volunteers:

Have a clue: especially about the volunteer's role in relationship to the organization as a whole. Using volunteers demands clarity about the trajectory of your organization and where everyone fits. You also need to keep an eye out for signs of potential trouble; is the volunteer's role getting ambiguous? Should it really be filled by a paid employee? And can you clearly explain the difference in roles between a volunteer and an employee? (Things can get particularly blurry since potentially both the clinic owner and the volunteers are working for free, but in different ways: the owner as an entrepreneur, and the volunteers as, well, volunteers.)

Make order out of chaos (carefully): many people would love to help with your clinic, but they don't know exactly how; it's your job to figure out how they can actually *be* helpful as opposed to unhelpful/in the way. Inviting a whole bunch of people into an organization without having a plan for how to use them is guaranteed to create chaos. The whole process of developing a structure for volunteers should be grounded in your sense of what is enough order for your clinic, without being too much; then you can decide where and how to plug them in.

Build and manage teams: if you have volunteers, it's best to think of them as a team (or a set of teams). Anything you can do to make it possible for them to support each other and have a sense of camaraderie will both save you some work and make their jobs more fun.

Coordinate other people's efforts; get the best out of other people: this is maybe the most important leadership aspect of working with volunteers, and it takes significant energy. You want to find roles where your volunteers can be successful and feel great about what they're contributing. You never want to inadvertently set them up to fail.

Depending on what their roles are in your organization, you may need to be available for coaching — which is important to think about before you invite people in.

Define goals and results: you should be able to describe, to yourself and your volunteers, what results you expect by involving them. WCA uses both volunteers and paid receptionists at our front desk, and we have financial targets for how much money our volunteers save the organization. This aspect is also critical in avoiding situations in which volunteers take on roles that aren't useful to your organization as a result of getting over-invested; being clear about your intended results helps you set boundaries.

Articulate and amplify values: when people are working without being paid, odds are very high that they're doing it because of their values. A key aspect of working with volunteers is recognizing, reinforcing, and appreciating the values that drive them to support your organization. At the same time, part of the reward for volunteers is having a setting in which they can live out their values, and so the better you can articulate those values, the more fulfilled your volunteers will be.

Communicate, communicate, communicate — about goals, values, and results: in some ways, having volunteers is no different than having employees, particularly with the level of communication that's required. Be prepared for this part to demand more energy than you might think. This is a good reason to have some excellent written materials available to your volunteers, as well as a clear orientation at the beginning.

Volunteers and Motivation

I've learned a lot from being a volunteer with both acupuncture organizations and non-acupuncture organizations. My first job out of college was as a volunteer coordinating other volunteers, so I've observed the volunteer role from a variety of angles, and I think there's a point that often gets missed:

It's crucial to consider volunteers' motivation as a precious resource that needs to be managed — carefully.

If you've invested in the administrative structure to have volunteers, you also need to think about how to keep them motivated. Especially for a small organization, high volunteer turnover can mean the whole project isn't worth it, in terms of time and effort. Some volunteer programs put energy into what's called "volunteer recognition" in ways that feel wasteful or beside the point to the volunteers themselves: for example, getting a personalized mug with the organization's logo is kind of nifty, but it's not a replacement for having a fulfilling, nourishing volunteer *experience*. If it's not fun or rewarding to do the work that volunteers do, all the swag in the world won't help.

Volunteers need to feel a sense of accomplishment as much (or more) than employees do. It's crucial not to squander your volunteers' precious motivation by directing their efforts toward unachievable goals. Getting results and seeing that their efforts make a difference will motivate people, and the opposite will demotivate them. Since getting results is what a leader is ultimately accountable for anyway, it's better to put your energy towards that than personalized mugs. (Especially when your organization has limited resources, which all community clinics do.)

I've been a volunteer for several organizations that were struggling financially; one in particular, outside of the acupuncture profession, taught me a lot about what not to do. The organizers were vocal in their requests for more people to step up and help out; they said they had too few people shouldering too much work, so I volunteered for one particularly understaffed committee. After a couple of meetings where the mood was decidedly depressing, it became clear that the unstated goal for recruiting new volunteers was to revive "the good old days", which in the case of this particular community institution were a really long time ago. They did need people to help with specific, do-able tasks, however their overarching goal was impossible: to turn back the clock and recreate the organization as it was circa 1980. They were in mourning (understandably) for volunteers who had passed away, moved on, or burned out, and unfortunately, they had a track record of burning out new volunteers as well. I was determined not to be one of those people, but of course I became one. I loved the organization, but I couldn't stay motivated to volunteer, although I tried; it just felt...futile. And the futility wore me out, as it wore most people out. (I can't say nobody warned me; I just didn't listen).

I know the organizers believed that if more people would just get involved, the organization would feel more vibrant and exciting (the way it used to feel) and *not* futile. This is a place that organizations can get stuck: they can't accomplish things without volunteer involvement, but the things they're trying to accomplish aren't realistic (see also, the acupuncture organization that announced it would fully integrate acupuncture into the US healthcare system in three years). As a result, they default to using guilt and obligation to get people to volunteer. "Come work for free and be miserable with us, trying to do the impossible, because you're a bad person if you don't" is not a good method to motivate volunteers.

That method does attract people who like to complain, particularly about other people's lack of involvement, and depending on how hard the complainers are willing to work you might get some things done in the short term — but in the long term, cultivating that kind of negativity is bad for the organization in all sorts of ways. You can end up with a vicious cycle: everything is harder to do in a negative environment, so you have fewer accomplishments with which to motivate potential volunteers, so you get fewer volunteers and/or wear out the ones you have, so you accomplish less, so people get more negative, etc.

It's the leader's job to look at the big picture of the organization, find achievable milestones (even when they feel very incremental) and then make sure people get there, together. This builds a positive organizational culture instead of a negative one. Instead of a vicious cycle it creates a virtuous loop: collective accomplishments build people's confidence and self-esteem, which leads to a positive environment; everything is easier to do in a positive environment, so you have more accomplishments with which to motivate volunteers, so you attract more volunteers and/or retain the ones you have for longer, so you accomplish more, so people feel more positive and confident, etc. It's always the leader's job to set the tone. A sub-category of tone-setting is watching out for these kinds of loops. It all hinges on having clear, achievable goals.

One challenging aspect of this task is that often, people within and outside of the organization don't really want clear, achievable goals; instead, they want impossible things and don't see the problem with wasting other people's time and energy. They don't realize that squandering volunteers' motivation on unattainable targets is bad news for an organization's sustainability. In the case of the organization that I stopped volunteering for, what it needed was a leader who could help it make the transition from unrealistic goals to realistic ones, from the organization's past to its present and even its future. This would have involved telling people things they didn't want to hear and saying no to certain goals. The leader probably would have gotten a lot of pushback from the people who enjoyed complaining about how much better "the good old days" were — the ones who didn't want to make *any* transitions — which is a major reason it didn't happen. There was too much resistance. The payoff would have been huge, though, in getting the organization out of its vicious cycle. (Last I heard, they're trying to make do with even fewer volunteers, and things have gotten even more negative, which of course some people are enjoying — but overall, the organization's prospects are not looking good.)

On the other hand, my best volunteer experiences were characterized by:

- Feeling like part of a well-oiled machine, working together to accomplish something amazing. (example: serving spaghetti to a thousand people in a church hall)
- Tangible results I could be proud of. (example: organizing a training for other volunteers)
- Being part of a positive social environment. (Example: having a sense of camaraderie with people that I would never have met otherwise; also known as "social joy")
- Learning things. (Example: new skills, getting a perspective on other people's lives, being exposed to different ways of thinking, everything under the heading of "wow, I had no idea that...")

All of these things, rather than “volunteer recognition”, kept me motivated to keep volunteering. Feeling useful is a tonic for all kinds of woes. It’s kind of addictive, in a good way. In every situation I felt useful as a volunteer, it was in part because there was someone working behind the scenes to support my role, to help me know what I was doing and then feel good about getting it done.

In the previous section on cash flow, I noted that all volunteer organizations are a special case: for them, the volunteers’ motivation is equivalent to cash flow. It’s what keeps the organization alive. Clinics for the most part don’t fall into this category, but the dynamic is worth being aware of. Motivation is powerful and precious, and it needs to be treated with at least as much respect as cash.

Board of Directors Volunteers: A Special Case

If you choose to structure your clinic as a nonprofit, there’s one category of volunteers that you can’t do without: people to serve on your Board of Directors. Everything above applies in spades to BOD volunteers, and there are some specific details to be aware of. Most importantly: if you structure your clinic as a nonprofit, the volunteers on your Board of Directors are collectively *your boss*. If ever a group of volunteers needed structure, clear expectations, a solid orientation, and a conscientious paper trail, it’s these folks. Please see more in the section on governance.

Motivation for BOD volunteers is also something of a special case. The BOD is, collectively, in a leadership role in the organization, so it needs to be able to: have a clue, define goals and results, and articulate and amplify values. Their domain is the big picture of the organization. This is a very specific kind of work that requires energy to do. It’s unfortunately not hard for BOD volunteers to get pulled out of their domain and into other kinds of volunteer work for the organization (especially in a small nonprofit) and then get worn out as a result of doing too much of the wrong things. A demotivated BOD is a very bad thing for an organization.

If you have a BOD, a big part of your job is making sure that they get to do the big picture work that they volunteered for, so that they can see results in that domain and they’re motivated to keep doing it. The BOD is a team that you have to build, manage, and support. This management requires a significant amount of energy and focus to do well. More than any other set of volunteers, they have to be able to function as a team. More than any other set of volunteers, a Board of Directors does NOT equal free labor.

The Legality of Volunteers

Technically, it’s not legal for for-profit businesses to use volunteers. All kinds of small community businesses do — yoga studios and organic farms are two common examples — but it represents a legal and financial risk for the owners. Nonprofits are the opposite; it’s entirely legal for even huge, profitable entities like hospitals to benefit from

volunteer labor. It's all about the organization's *tax status*; it has nothing to do with the organization's actual need.

Cooperatives represent a gray area, because technically they are for-profit businesses owned by their members. Cooperatives exist to facilitate economic transactions between their members; for example, a cooperative is automatically a legal microlending entity as long as the co-op is loaning money to its members or members are loaning money to each other. And so for community acupuncture clinics, becoming a member of the POCA Cooperative allows them to accept contributions of time and work from other co-op members (patient members). This arrangement is not completely without risk, because cooperatives exist in a gray area with regard to volunteers, but it's different than for-profit clinics accepting donated labor without a cooperative involved, not least because the cooperative relationships are transparent and involve clear consent. POCA provides volunteer agreements for clinics to use and patients to sign; see pocacoop.com for more information. This provides one element of the necessary paper trail for using volunteers.

(And by “gray area”, I mean it appears to cost more than it's worth to really clear it up. At one point a Cooperative Development Association called up POCA and said, hey, we've spent \$14,000 in legal fees trying to figure out whether cooperatives using volunteers is “completely legal” or “not quite” – we've run out of money and we still don't have an a clear answer. Do you know anything? To which POCA answered, sorry, no, our attorney told us it was a gray area and we're grateful he didn't charge us \$14,000 just for that.)

Volunteers can be a huge aid to community clinics in the process of scaling up from tiny, solo, barely-making-it, to robust community institution. Referring back to the section, Making an Organization in Stages:

Be a solo practitioner (and build a big enough patient base to support yourself)

Be a solo practitioner plus volunteers. This is the phase where accessing contributions of time and work via the POCA Cooperative could be very helpful in getting to the next stage, whether you decide to have your clinic be a for profit (in which case you could consider hiring an employee as opposed to using volunteers) or a nonprofit (in which case you can just have volunteers without the mediation of the cooperative). Some clinics choose to remain for profits and continue to use volunteers via the co-op, which means everyone involved needs to be a member. (Your mileage may vary.)

To Sum Up

Despite all the work involved with having a volunteer program, I'm still an enthusiastic advocate because in my experience, it's worth it. The presence of volunteers amplifies the values of community support, solidarity, cooperation and access. Volunteering is a

way for patients to figure out if they might want to become punks and run a clinic themselves. Making room in your organization for volunteers can be a way of investing in the next generation of community acupuncturists.

Worksheet

Reflect on your own experiences as a volunteer. What stands out for you as high points or low points? What motivated you or demotivated you to keep volunteering?

How (and Why) to Have a Nonprofit Community Acupuncture Clinic

Begin with Why

A nonprofit organization is a big project that will go much better if you're crystal clear about why you're undertaking it. It's important that you've spent some time considering the pros and cons. There are good reasons to structure your clinic as a nonprofit, and then there are not so good ones. (See more in the WCA Case Study section.) Ultimately, whether or not this is a good idea will depend on your particular personality and circumstances; nonprofits are a great fit for some punks but not every punk.

Some good reasons:

- You feel strongly that your clinic belongs to the community rather than to you personally, and you want an organizational structure that reflects that.
- You're already looking ahead to succession planning and you want a stable foundation for your organization outside of conventional "ownership".
- You like more complex social containers, and you want to involve more people in your organization, without anyone being a legal owner.

Some not so good reasons:

- You're afraid of running a low-cost, high-volume, fee-based small business and you think that seeking donations and applying for grants would be an easier way to make money. (Insert image of The Scream here)
- You're nervous about taking full responsibility for your organization.
- A nonprofit just kind of sounds better/more inspiring?

Pro Tip

Any vague reason for having a nonprofit falls under the category of "not so good".

Community acupuncture clinics are different from most nonprofits in that the basic business model makes it possible for the organization to earn its own money as opposed to depending on grants and donations. To the best of our knowledge, there is no foundation or grant maker out there whose goal is to fund ongoing low cost acupuncture for ordinary people, so if *your* goal is to provide low cost acupuncture to ordinary people, your organization is going to *have* to earn its own money, via those ordinary people paying what they can afford for their treatments. Obviously, there are compelling reasons that fall under the header of "solidarity not charity" for doing this, in addition to

sheer practicality. The choice to make a community acupuncture a nonprofit is really about the benefits of this particular organizational structure, not about accessing some magical source of cash flow to fund day to day operations.

Pros and Cons

There's quite a bit of overlap here with the difference between being a sole proprietor and having a larger organization (see section on Pros and Cons of More Complex Social Containers (Organizations): a nonprofit fundamentally means dealing with more people and more structure. Nonprofits are more complex than sole proprietorships and other for-profit businesses.

Pros

Given that most community acupuncture clinics just break even (including paying their staff, of course) and don't actually make much of a profit, being able to describe your clinic as a nonprofit will make more sense to other people and will facilitate certain relationships. Let's face it, "social business" is kind of hard to explain. When WCA became a nonprofit, I noticed that it got easier for the community at large to understand who we were and what we were about. An interesting subset of this kind of understanding: being a nonprofit shut down an otherwise unpleasant dynamic in my relationships with some other WCA employees that could be summed up as "you own it, so what do you have to complain about?" Once I didn't own it, I still had plenty that I could have complained about, but I no longer had to *explain* that to anyone. Hardly anything about the business changed, but suddenly nobody assumed anymore that I must be living in a capitalist paradise of business ownership; overall I think it increased a feeling of solidarity among WCA employees.

Having the structure of a nonprofit can actually be supportive, if you like the structure. In some ways, becoming a nonprofit made WCA easier, not harder, to run on a day to day basis. There was a whole category of communication we didn't have to do anymore about why we operated the way we did. Also, it gave us some structures we didn't have to make up ourselves and it pre-made some decisions for us (particularly in relationship to succession planning; we knew we'd never be in a position to sell the business to anyone which allowed us to focus on other things).

Given that most community acupuncture clinics just break even and don't actually make much of a profit, not paying taxes on whatever tiny profit margin you do have can be a huge deal. In WCA's case, when we were a for profit we could never build a savings cushion because the taxes would just eat it up, every year; once we became a nonprofit, we were able to maintain a decent operating cushion in our savings account.

Small, random cost-savings here and there, like savings on taxes, add up. This category varies from state to state, so you should check with an accountant. In Oregon, nonprofits

receive a discount on rent because landlords don't have to pay property taxes on spaces that are rented to nonprofits. Similarly, certain vendors have discounts for nonprofits. All of these little advantages help us maintain our savings account.

Donations are nice. Unlike small business taxes, they don't tend to have a significant impact on a clinic's finances. Typically, for WCA, donations represent between 1-2% of our income. (An exception was the first few months of the coronavirus shutdown, when donations from patients covered a sizable percentage of our clinics' rent.) Some patients are very generous, they really like giving the clinic money, and they also like being able to deduct it on their taxes.

Succession planning: as noted above, a nonprofit provides part of the structure for succession planning. Because a nonprofit is owned by the community rather than an individual, technically its board of directors is responsible for finding someone to run it. The reality is more complex (see more in section on governance) but for some clinics, like WCA, it makes more sense to look for someone to run it as opposed to someone to own it. Ownership of certain community acupuncture clinics is simply not an attractive proposition. If a nonprofit is well-constructed, it's potentially able to provide more support to its future leader than a business would to its future owner.

Cons

Having a nonprofit represents a major investment in terms of time and energy to deal with governance, volunteers, and a more demanding paper trail. It requires a certain amount of tolerance for bureaucracy, so if you don't have any of that, a nonprofit isn't an option. Similarly, you have to be able to keep your paper trail organized; don't underestimate how on top of the paperwork you're going to have to be. It's possible for ordinary small businesses to be somewhat sloppy with their paper trail and still be okay; for a nonprofit, not so much.

Flexibility, particularly around decision-making. As noted elsewhere, the decision-making structures for a small business are potentially very simple: the owner can make all the decisions they want to, on any timeline of their choosing. Having a nonprofit means giving up that level of flexibility and autonomy and accepting a decision-making structure that involves a board of directors (see more in section on governance).

Succession planning: if you are in the unusual and fortunate position of having a potential successor who really wants to own your clinic, and who might even want to buy it from you, you probably don't want your clinic to be a nonprofit.

Factors that Aren't Pros or Cons but Commonly Confuse Punks

Your salary. As noted elsewhere, being a nonprofit or a for profit is about the legal structure of the organization, not about how much money the organization actually has or how it compensates its employees. Think about highly profitable hospitals whose

CEOs make millions of dollars but are technically nonprofits owned by the community. Obviously most nonprofit community acupuncture clinics are dealing with an entirely different reality in terms of available cash; however, being a nonprofit doesn't mean that you can't be paid competitively for both your clinical and administrative work. It does mean that your board of directors has to agree to your salary, but if you're doing governance correctly, your board won't want to underpay you. (See more in the section on governance.)

How much money the business as a whole can make or save. Similarly, being a nonprofit doesn't mean that an organization can't make more than it spends or have a savings account. In fact, best practices suggest that nonprofit organizations have a savings cushion that represents at least six months of operating expenses. (That's more than most community acupuncture clinics that run on a shoestring would dream of saving.)

Basic Steps of Making a Nonprofit Organization

This assumes that you as an individual are taking on the role of "founder". If there's a group of people involved, collectively they'll be the founders. An individual will generally default to being the nonprofit's executive director; if there's a group of people doing the work of creating the nonprofit, they'll have to decide who will take on that particular role. These are steps for creating a nonprofit in the US; some parts will be different in other countries.

- 1) Choose a name (you'll need it for legal documents).
- 2) Draft a business plan — it can be a very simple one that shows what expenses you expect to have, how many patients you expect to treat, and what your cash flow is going to look like. A nonprofit is a group project, so you're going to need a concise way of explaining the business part of it to other people. (Pro tip: if your business plan shows big expenses that you expect to magically cover via donations from unknown sources, go back to the drawing board. Your business plan needs to be realistic.)
- 3) Recruit volunteers for your board of directors (see more in section on governance). The minimum number for a startup nonprofit board is three people, and it's better to start out with fewer people to wrangle at the beginning. Share your business plan with these people as part of the recruitment process: they need to know what they're volunteering for.
- 4) Form a legal corporation in your state and designate it as a nonprofit. (I recommend a lawyer for this step; some people have done it without a lawyer.) Being a nonprofit corporation at the state level gives you some benefits, but mostly it's a prerequisite for being a nonprofit at the federal level, which is where the real advantages, particularly being tax-exempt, appear. You may need to

create some aspects of your bureaucratic paper trail like your bylaws and mission statement in order to complete this step.

Read more about the process of becoming tax-exempt at the IRS' website, as a way to prepare for the next steps: <https://www.irs.gov/charities-non-profits/application-for-recognition-of-exemption>

- 5) Apply for an EIN (employer identification number, even if you don't yet have any employees). An EIN is for a business what a social security number is for a human; you can't do much, legally, without it. Open a bank account in your organization's name, using your new EIN.
- 6) Begin working through Form 1023, the application for tax-exempt status in the US. See appendix for a completed sample form for a community acupuncture clinic. Working through this application will push you to think out some issues and make some decisions that you might not have thought about. (I recommend an accountant to help with this step; some people have managed without one.)

If you haven't already created your bylaws and mission statement, you'll need to do it for this step. You'll definitely need your EIN.

Submit the application and pay the fee (it's not cheap).

- 7) Wait for approval before you do anything else (like signing a lease). Pro tip: although many community clinics start out as sole proprietorships and become nonprofits later, it's much easier to get your nonprofit set up before you start doing any business.

If you already have a clinic and you're converting it, I really recommend an accountant and a lawyer to help out, since conversions can get confusing. In some ways the process might look similar: you create a nonprofit corporation and then essentially donate your existing clinic to the corporation. If your clinic was a legal for-profit corporation before the conversion, you'll need to shut down that corporation once you open the new one; if your clinic was a sole proprietorship, there's nothing to shut down. In either case, you'll be donating your recliners and your office supplies and the other material aspects of your business to the new nonprofit corporation. Getting the paper trail right for a conversion is important, because you don't want the IRS thinking that you're up to anything sketchy, like trying to dodge your taxes.

- 8) Start your operations as a nonprofit; be ready from day one to keep a really good paper trail, which includes not just financial records but also minutes of your board of directors meetings and documents recording any policies, particularly financial policies, that you create. Being a tax-exempt nonprofit means that at any point, the government can come in and inspect all your records. Take the

time to make sure you're on top of "required filings and ongoing compliance" with the IRS.¹³

Having done all that work to achieve tax exempt status, you don't want to accidentally lose it!

Nonprofits and Employment

Because a nonprofit is a corporation, it has to follow laws that apply to corporations, including the need to pay its employees a minimum wage. Most community acupuncture clinics go through a phase where they couldn't possibly pay their founders for all the work they're doing. Social entrepreneurship unfortunately means exactly what regular entrepreneurship means, which is *working for free* at least at the beginning and possibly every time your organization grows. This reality doesn't always jibe with minimum wage laws. Whether you're starting your clinic as a nonprofit, or converting an existing clinic to a nonprofit, this is an area that will require some careful planning.

Governance

The word governance comes from an ancient Greek verb that means "to steer". According to Wikipedia, it "refer(s) to the actions and processes by which stable practices and organizations arise and persist. These actions and processes may operate in formal and informal organizations of any size; and they may function for any purpose, good or evil, for profit or not."¹⁴ Governance, for organizations, is about the structures that steer them.

I think having some understanding of governance is helpful for punks and other people who are innately suspicious of organizations and leadership, because it demystifies something that might otherwise feel threatening. Understanding governance is also crucial to the project of approaching organizations as tools that can be used for a variety of purposes (as the Wikipedia definition emphasizes.) This section will focus on nonprofit governance, because that topic is unavoidable for anyone who wants to structure their clinic as a nonprofit; some of the same ideas apply to for-profit governance, but like everything else in the for-profit world, governance is more flexible.

As noted elsewhere, when people talk about governance structures, they're generally referring to a board, bylaws, the board's meeting minutes, and whatever formal or informal processes exist to tie those things to the rest of the organization. In my experience, it's most useful to think of a board as the team that can make decisions that

¹³ <https://www.irs.gov/charities-non-profits/life-cycle-of-an-exempt-organization>

¹⁴ <https://en.wikipedia.org/wiki/Governance>

affect all other teams in the organization — so it really needs to have the right information in order to make good decisions.

For a nonprofit, a board is legally responsible for four major things: the organization's mission; its fiscal health (which means the board needs to approve the budget); long term strategic planning; and hiring (and if need be, firing) the executive director. Since a nonprofit is legally owned by the community, a board is what takes the place of the business owner for a small business.

Sometimes the board's responsibilities are referred to the "fiduciary duties" of care, loyalty and obedience. "Fiduciary" means that the board is in a position of trust. The duty of care refers to the board's responsibility to pay attention to what the organization needs. The duty of loyalty means that a board places the organization's interests above their own personal interests (and it comes with its own part of the paper trail, which are "conflict of interest" agreements that board members need to sign). The duty of obedience means that a board needs to prioritize 1) the organization fulfilling its mission, and 2) the organization obeying all applicable laws.

Some Problems with Nonprofit Governance Structures (and Solutions)

It's helpful to understand the history and context of nonprofits to anticipate some problems that can arise. Paul Kivel, in his essay "Social Service or Social Change" is critical of the role of nonprofits in society:

"The ruling class created the non-profit legal status primarily to establish foundations so they could park their wealth where it was protected from income and estate taxes. The foundations allow them to retain control over their family wealth. The trade-off they made with the government was a legal mandate to distribute a very small percentage of each foundation's income every year for the public good. A vast network of non-profits was set up to receive and distribute this money."¹⁵

He contrasts "getting ahead" (what everyone is supposed to do in capitalism) with "getting together" (solidarity) and argues that nonprofits are burdened "with a ruling class agenda dictated through grant proposals, donors, foundations, government agencies, "best practices," quantified evaluations, standards, and traditional policies".

Community acupuncture clinics that are structured as nonprofits won't have this problem for the most part, because they won't qualify for foundation or government

¹⁵ <http://sfoonline.barnard.edu/navigating-neoliberalism-in-the-academy-nonprofits-and-beyond/paul-kivel-social-service-or-social-change/>

funding in the first place. Unlike other nonprofits, solidarity is the only economic model we can depend on, and thus our default setting. (I think that's a good thing.) However, the history of nonprofits as tools of the ruling class can show up when we create and work with our boards.

In my experience, the conventional nonprofit template for working with a board just isn't tenable for a community acupuncture clinic (or school). The ways that boards are supposed to do what they do were determined by people who had a certain image of what nonprofits and their boards should look like. Simply put, the conventional template assumes that the people who can make overarching decisions for the organization are going to have a lot of available time and energy to volunteer in the role of board members (plus experience in managing organizations, plus financial resources to donate to the nonprofit, plus lots of wealthy friends to enlist as donors). It's an upper-middle-class template for volunteering, and it's hard to execute when most people in the organization (board, staff, volunteers, patients) don't have those kinds of resources.

In theory, boards are supposed to manage themselves. But managing a board is *work*, and most of the people who have the kinds of perspective and life experiences that make them good decision-makers for community acupuncture clinics barely have enough time and energy to be on the board in the first place, let alone do the extra work of managing its operations. So in my experience, it becomes the executive director's job to manage the board and make sure that it has what it needs in order to do its job. This is important to keep in mind if you're setting up a nonprofit: managing the board will most likely be a significant part of your job. Regardless of how many hours it actually takes, it demands a certain amount of headspace. You will most likely not have the kinds of volunteers on your board who have that kind of headspace themselves to give to your organization, not to mention hours to spend on organizing the board's activities. So you shouldn't expect that the board can accomplish its tasks on its own. This doesn't mean that you can't have a fantastic board doing great work for your organization; it just won't look like the upper-middle-class version.

In my experience, it helps to be very clear with board members about their expected time contribution (for example: two hours a month, give or take) and the specific tasks the board needs to accomplish (approving the budget, producing a strategic plan, filling out evaluations). It helps to have a yearly calendar for the board's work so everybody knows what has to get done, and when. It's also important to put energy into planning board meetings ahead of time, to make sure they're productive, successful, and fun. As the executive director, you need to provide the container so that the board can fill it with their ideas, perspective, and analysis.

Another problem with the nonprofit board structure is that there's the possibility of the board getting over-involved in aspects of running the business. This is a particularly scary prospect for the founder of a boot-strapped community acupuncture clinic with very narrow margins and not much room for mistakes. (Though it can be an issue for

conventional nonprofit organizations as well.) I was concerned about this when we converted WCA into a nonprofit: that our new board might want to fix things that weren't broken and mess up our fragile little operation that against all odds was paying its bills. As a result, we recruited our new board members very carefully — which I'm glad about — but preventing this problem isn't all about recruitment; it has a lot to do with understanding structures and communicating expectations.

Tinkering around with sociocracy helped me understand the role of the board more than reading materials aimed at conventional nonprofits. In sociocracy, the board is called “the top circle” and its domain is specifically mission, long-range planning, and contributing specific perspectives (for example, technical, legal, or long experience with business). Because sociocracy is based on the premise of interlocking, semi-autonomous teams all doing some degree of self-management, it made it easier for me to recognize the board's unique role with regard to mission, long-range planning, and perspective — as opposed to seeing them as some kind of interfering overlords with their hands in everybody else's business.

Even in conventional nonprofits, there's supposed to be a line the board doesn't cross in terms of staff and operations: the board interacts with the executive director, who is accountable to the board, but the board should never *go past* the executive director to other staff or other operations. If the board is unhappy with the executive director's performance and results, the board should make that clear and if need be fire them and hire a replacement — but that's the limit of the board's role in operations. Having this limit is also crucial to the board being able to do good work instead of getting overextended.

In my experience, when roles and expectations are clear, it's great to have a board. It's great to have some well-qualified people spending their time and energy exclusively on the big picture: checking in on the organization's mission and goals to make sure they're being fulfilled and that they still make sense as they're written; making a strategic plan to guide everybody else's work; reviewing the budget and asking questions that maybe nobody else would have thought of; and documenting that the board itself and the executive director are getting results for the organization. A high-functioning board is a pleasure to work with, a high point of running an organization, and an example of what bureaucracy is actually good for.

Director/Board Relationships

There are a lot of resources out there in the nonprofit literature about cultivating positive director/board relationships. None of them helped me very much, in part because a lot of them are written from the perspective of the upper-middle-class board volunteering template. For example, they tend to assume that the board chair in particular has a lot of time to devote to extra responsibilities related to working with the executive director (otherwise why would they be a board chair in the first place?).

The director/board relationship can be particularly weird territory for the founder of a community acupuncture clinic, whether it starts out as a nonprofit or converts to nonprofit status. In order for the clinic to get off the ground, the founder (or founders) need to really embrace their entrepreneur role; even though the clinic is a nonprofit, they need to act like small business owners. But then there's this board, which in theory is...their boss? How is that supposed to work?

I've had conversations with punks about nonprofit conversions in which a particular fear has appeared: "Well if the board is my boss, what if they fire me, and I lose this business I built from the ground up?" I think that's a reasonable thing to consider, but it can also reflect working-class apprehension about bureaucracies and bosses. In a nonprofit, the board is ultimately responsible for the organization, which means if they fire the executive director, they're responsible for replacing that person. In reality, replacing a community acupuncture clinic founder is almost impossible to do, and no board that has a clue about how the clinic runs would do it on a whim. Succession planning for founders typically takes a long time if it happens at all. The real worry for founders in relationship to boards is that board members become unhappy and quit, and then the founder doesn't have a board to work with. Rather than protecting themselves against the board, the founder's more pressing concern should be to protect the board as a special and valuable category of volunteers whose time, energy and motivation needs to be carefully guarded.

There was a period of time when I was pretty unhappy with my role as executive director of an acupuncture school because I felt like a cross between a customer service representative and everybody's mom. My role didn't have enough definition, and that affected my relationship with the board (as well as everybody else in the organization). I had to spend some time defining a role that I could live with, a way of describing my job to myself and other people that didn't leave me feeling martyred, and then building better boundaries around the new definition. What worked for me was imagining my executive director job — in relationship to the board as well as everybody else — as being an *organizational mechanic*.

As an organizational mechanic, my primary responsibility is to take care of the structure of the organization itself. My job isn't to try to make everybody happy as individuals, it's to make sure that everybody has what they need to be effective in their jobs (including me). In relationship to the board, my job is to make sure that they have the resources, information and support to do *their* job. Fortunately, because of the legal structure of nonprofits, the board's job is very clearly defined: they need to review the mission and goals; approve the budget; produce a strategic plan; and fill out evaluations of their work and mine. As an organizational mechanic, I need to make sure they get those things done, and then make sure that the rest of the organization aligns with the board's work. That's much more proactive and orderly than being a customer service representative, and though it has some overlaps with parenting (parents take care of

structures too) it's more defined and specific than being everybody's mom, and infinitely more conducive to good boundaries.

The idea of being an organizational mechanic immediately made the board/director relationship less weird for me, because I knew what I was supposed to be doing and I knew what the board was supposed to be doing. In community acupuncture, we're all dealing with limited resources all the time; we're all in this together. Defining our roles helps ensure that we're making the best use of our limited resources, including the board's time and energy.¹⁶

Your mileage may vary.

How to Be an Awesome Board Member (tips for punks serving on their friends' nonprofit boards)

- 1) Keep the big picture in mind. For community acupuncture clinics, being a nonprofit is mostly about achieving/maintaining a certain tax status, which requires a substantial paper trail. By serving on your friend's board, you're helping them maintain the necessary paper trail. This isn't a glamorous role, but it's a very important one.
- 2) Recognize that the nonprofit structure reflects a template that was created by rich people, for rich people, many years ago, for purposes very different from yours. A lot of conventional advice for board members and executive directors is not going to apply to your situation. Watch out for unreasonable expectations for both you and your friend.
- 3) Have an honest conversation with your friend about roles and boundaries. Make sure you both understand your legal obligations as a board member (mission, fiscal health, long-range planning, being the entity that the executive director is accountable to) and what it looks like for you to fulfill them. Do either of you have any weird feelings about any of those obligations? That would be understandable. Talk it through until the boundaries are clear and you both feel that you can fill your roles without stepping on the other person's toes or stressing them out.

A subset of this conversation: make sure you and your friend don't expect you to be on the board forever. Two years is a common term for board service, and it's okay to approach your role knowing that it's time limited.

- 4) Show up to board meetings, answer board emails, sign all the things that need to be signed. Don't make your friend chase you! Absentee board members are very

¹⁶ Lots of governance resources here: <https://nonprofitoregon.org/pp/governance>

frustrating and add an extra layer of work to your friend's already demanding job of running a community acupuncture clinic. On the other hand, if you can help your friend establish a routine for getting the board's work done, you will make their job easier.

- 5) Keep an eye out for other potential board members who could do a good job. Board recruitment can be a real headache for busy community acupuncturists, and if you can help with this task, your friend will probably be grateful. Just be sure your communication is clear, because you don't want to suggest board service to someone that your friend wouldn't actually want on their board.
- 6) Have fun! Board service doesn't have to be onerous and boring. Consider wearing silly hats to board meetings. Bring excellent snacks. Tell jokes in the opening round. Approach board meetings as a pleasant social occasion and an opportunity to support your friend's good work.

Part 4: Resources Bricolage

How to Make Books about Management More Useful, Less Annoying, and Actually Relevant to Punking

As noted above, there are so many books and websites about leadership and organizational management out there that it's kind of like a treasure hunt: hidden in the sheer mass of verbiage are little gems of insight, strategy, and hacks just waiting to be scavenged and repurposed for our use. I didn't feel that way when I first started trying to read leadership and management books, though; what I felt was overwhelmed, frustrated, and despairing, because what I was reading made me feel like I was doing everything wrong, which made me think why bother with leadership and organizational management anyway.

It took a while to figure out the problem, which also turned out to be kind of a translation key that made many of those previously frustrating books suddenly useful: they all assumed that any organization that cared about leadership and management had *plenty* of resources to pay people *just* to be leaders and managers. For example, here's a quote from Alison Green of Ask A Manager: “(that's) why we have managers — because there's value in having a person whose job it is to look at people's work, assess it, and give feedback.” This perspective is so far from the scrappy entrepreneurial context that shaped me, where not only wasn't there anybody to oversee the work that needed to be done, there was barely anybody to do it in the first place, and getting paid for the work was something to hope for, not something to take for granted.

It was a lot like my experience with figuring out how to have an acupuncture practice: when I was starting out, all of the practice management resources out there assumed that my patients had plenty of disposable income to pay for high-priced individual treatments, and if they didn't, it meant that there was something wrong with them or me — particularly that they and I didn't value acupuncture enough. There's a similar assumption that the work you're doing, and the people you're doing it for, are sufficiently supported by society at large that of course you'll generate enough money to support, in turn, a manager class and if you don't, well it's because you don't value management. *There's no recognition that valuing something and being able to afford it are not the same thing.* Leadership and management books tend to take for granted an economic baseline that's unattainable for my clinic: if we want to keep our prices low enough for our target patient base to afford, we're just not going to generate the cash needed to pay a layer of middle managers to do all the things these books assume that middle managers are available to do.

In many books and websites related to business and organizations, there's another assumption, that even small businesses exist to make money, and if the business isn't making plenty of money, why on earth would anyone bother trying to grow and stabilize it, let alone use it to make more jobs? There seems to be no awareness of people who are entrepreneurs as a matter of survival, whose choices otherwise are actually worse than dealing with all the demands and uncertainties of entrepreneurship, and also no awareness that people might consciously choose to do work that isn't valued by capitalism. Most business books are written with a middle-class filter, for people with the kind of socioeconomic resources and class background that allow them to go out and get a "good" job if they decide they don't like owning their own businesses. That's fine, of course, but not helpful to many punks.

Long story short, I eventually realized all those assumptions didn't prevent me from taking ideas from management books and making them work in my world, for my purposes. I just had to approach them armed with the affirmation that there's no one *right* way to do anything, only lots of *possible* ways. I had to tune out all of the low-level shaming about what organizations and businesses "should" want to do and be able to do. I had to remember that these books weren't written for me — but that didn't mean I couldn't rifle through them with my grubby low-class hands, grab any idea that looked promising, and then re-use it in ways that would probably disgust the authors but that totally worked for me.

Here's a list of business and management resources that I've found useful, and how, and any specific adaptations that were needed.

Sociocracy

Sociocracy is meant to find a sweet spot in between efficient-but-too-rigid hierarchies and egalitarian-but-too-slow nonhierarchical organizations that run on consensus. It's a kind of hybrid of hierarchy and consensus that recognizes the strengths, and tries to minimize the weaknesses, of both. It's meant to be flexible and organic without being chaotic, and it puts a lot of emphasis on how decisions are made.

As noted earlier, in my experience, people recognize decision-making as a form of power and so they want to be involved with it. However, including everybody in an organization in making *every* decision would bog down operations to the point that the organization couldn't function (unless of course your organization is you as a sole proprietor). One of the best things about sociocracy is that it divvies up decision-making, so that both the power and responsibility of decision-making are shared in practical ways. Sociocracy can't work without trust but using sociocracy creates trust (presuming it's done right).

There are so many excellent, detailed sociocracy resources out there that I'm not going to try to summarize their content here; I'm only going to talk about what aspects we scavenged and how we use them for POCA Tech and WCA. See especially:

<http://www.sociocracyforall.org/>

<https://patterns.sociocracy30.org/>

<https://www.sociocracy.info/books-videos-websites/>

and even the Wikipedia entry is pretty good: <https://en.wikipedia.org/wiki/Sociocracy>

Here are some principles of sociocracy that we particularly like:

Organizing in Circles

Rather than a typical top-down organizational chart, sociocracy looks at an organization and asks, what are its important domains (areas of influence, activity, and decision-making)? Domains get represented by circles of people who take responsibility for them. Circles are semi-autonomous, which means they can make their own decisions; however, any decisions that affect other circles have to be coordinated with those circles. This reflects some nonhierarchical idealism but it's also common sense: people who are doing the work are the ones who know the most about it, and so unless there's a really good reason to the contrary, they should also be deciding how the work gets done. Wherever possible, people whose work is affected by decisions should be involved in making those decisions. This makes an organization not just inclusive, but efficient. Circles are teams, and we love teams.

Transparency

Unless there's a reason for confidentiality, information that's valuable to the organization should get recorded and be accessible to everyone. Financial information and decisions, in particular, should be transparent. Because decision-making is distributed throughout the organization, everyone needs access to information to help make good decisions. One way that information gets recorded is in meeting minutes of the circles; as it turns out, this is a low-stress way to maintain the kind of paper trail that an acupuncture school needs in order to get and stay accredited.

Constant but Incremental Evaluation and Improvement

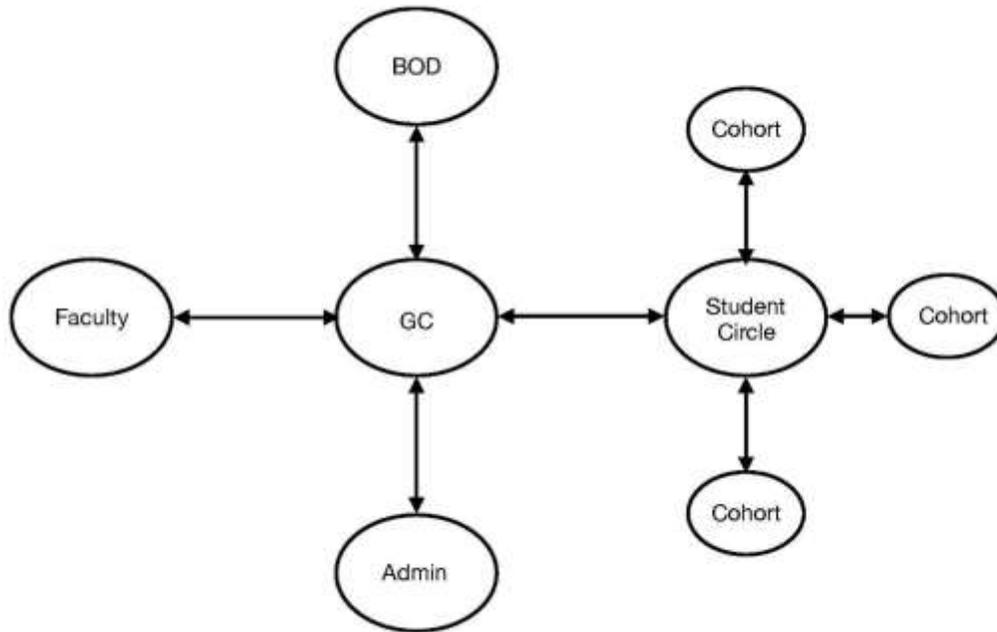
An important expectation for circles is that they participate in some kind of process of self-evaluation (probably best determined by the circle itself). What are the results of the circle's decisions? Are they having the desired effect? If not, why not, and what adjustments need to be made? Circles are supposed to meet regularly, so this makes it relatively easy to have these kinds of conversations in a natural, informal way. Circles are also supposed to report to other circles within the sociocratic structure, so this provides another natural opportunity to say things like, "Well, we tried X, and it didn't work the way we intended, so we're going to try Y next, we'll keep you posted." This is another low-stress way to demonstrate a process of ongoing institutional self-evaluation, which an acupuncture school also needs in order to get and stay accredited.

Consent-Based Decision-making

Consent, as opposed to consensus, is when people in a circle agree to a proposal because 1) they consider it to be "good enough for now and safe enough to try"¹⁷ and 2) they have no unresolved objections. Consent is achieved by means of reaction rounds, in which everyone in a circle goes around one at a time and says whether they consent, or they have objections to a proposal. The process of getting to consent is meant to flush out and address objections that otherwise might go unspoken, thus harming the cohesion of the team. I heard one sociocracy consultant describe consent-based decision-making as the process of moving the football down the field toward the goal: it's meant to keep an organization from getting bogged down. For this to work, everyone has to agree that they want to keep things moving, as opposed to fighting for their own preferences.

¹⁷ <https://patterns.sociocracy30.org/consent-decision-making.html>

POCA Tech's Sociocratic Structure



Here's how meetings happen throughout the organization, and how decisions get made.

Board of Directors

Meets once a year in person, and otherwise quarterly or more by email. In sociocracy the Board is often referred to as “the top circle”, meaning that its domain is big picture policy and planning that affects all other circles. Like a conventional nonprofit Board, our Board is responsible for: the nonprofit's fiscal health, which means approving the annual budget; long term planning; hiring and overseeing the Executive Director; and the mission, goals and objectives of the organization. The Board is not meant to be involved in organizational operations outside of its relationship with the ED. Led by the President of the Board, with assistance from the Executive Director.

Administrative Circle

Meets monthly. Comprised of the Executive Director, the Academic Dean, the Registrar, and the Administrative Coordinator. This circle is responsible for policy, procedure and operations related to the administration of the school, including things like admissions, document management, drafting the budget for the Board to approve, and interacting with regulators. Led by the Administrative Coordinator.

Faculty Circle

Meets twice a month or as needed, in addition to an annual retreat. Comprised of classroom faculty and clinical supervisors. This circle is responsible for the design, delivery, and assessment of the educational program, which in practice means everything related to the curriculum, teaching, and supervising. Led by the Academic Dean.

Student Circle

Meets once a month. Comprised of elected representatives from each cohort (1st, 2nd, 3rd years). This circle is responsible for organizing the students for mutual support and for developing policies, procedures and some evaluations related to students, for example: The Baby Policy (bringing infants to class), Peer Needling Evaluations, managing classroom layout and organizing study groups. Led by an elected student representative.

Sub-Circles of individual student cohorts also meet monthly.

General Circle (GC)

Meets quarterly. Comprised of representatives from all other circles. This circle is responsible for coordinating decisions, policies and procedures that affect multiple circles. Often individual circles will bring proposals to the General Circle and ask for review from other circles. All major policy decisions are brought to the General Circle for discussion; the GC also gives feedback to the Board of Directors as needed. Led by the Executive Director.

At POCA Tech, the main modification we made to sociocracy is that we've simplified it to some degree, and we don't try to execute it perfectly. At WCA, we're still tinkering with our organizational structure and still figuring out what elements of sociocracy we want to include (other than how we do our meetings).

Because sociocracy distributes decision-making throughout the organization in a structured way, to some degree it takes the place of having a layer of middle management. Sociocracy makes it possible for people to self-manage at least partially, which helps everyone feel more empowered and invested. It also — this can't be understated — *saves money*. A conventional layer of middle management is, as far as we can tell at this point, something that a punk organization can't afford.

Sociocratic Proposal Template

Who is the proposal coming from?

A short summary of the proposal?

Who will this proposal impact? (which Circles might be involved, etc)

What resources/capital does this proposal require? Spell out (budget, people, etc)

Does this proposal create more work for anyone? If so, who?

What's the timeline?

Why would we want to do this?

Ask a Manager

<https://www.askamanager.org/>

I've found Alison Green's blog and her book, *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*¹⁸, very helpful (once I figured out my translation key).

Here's her description of her book's main points, in her own words:

*"I think the biggest thing that you want to do as a manager, because everything else will stem from it, is to be really clear in your own head on what your job is, what you're there to do as a manager. And I am going to argue that **your fundamental job as a manager is to make sure that your organization gets the results that it needs.** There's a lot that goes into that, of course. There's laying out clear expectations and setting the right goals and hiring the right people and developing them and giving them good feedback – and building a culture that supports all of those things and is somewhere that people want to work. But ultimately those are all means to an end, and that end is achieving whatever it is that you're setting out to achieve, whatever the goals of the company are. And the reason I'm stressing that is that because a ton of managers lose sight of it. They think that their job is just to develop people or to keep their people happy, or on the other end of the spectrum that they're there to just enforce rules or monitor people. And it is important to develop people and keep your team happy and monitor work, but those things aren't ends in themselves. You're doing them because they're part of achieving the results that you want."*

And again, I'm belaboring this because if you lose sight of it, you will find yourself prioritizing the wrong things. You'll find yourself avoiding making a decision that will be unpopular or shying away from a hard conversation because you don't want to make somebody unhappy, and so forth. So that's point number one. Look at everything through the lens of how it supports you achieving whatever it is that you want to be achieving."

Alison's book has some excellent nuts-and-bolts specifics, but the blog has even more of them, sometimes in the form of podcasts:

<https://www.askamanager.org/transcript-of-how-can-i-be-a-good-manager>

¹⁸ Green, Alison. Hauser, Jerry. *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*. Josey-Bass. San Francisco. 2012.

<https://www.askamanager.org/2008/09/reality-based-management.html>

<https://www.askamanager.org/2018/04/what-your-tone-should-sound-like-in-tricky-work-conversations.html> (This podcast includes not only a script for difficult work conversations, but exactly how you should sound when you deliver it.)

About micromanagement: <https://www.askamanager.org/transcript-of-help-i-work-for-a-micromanager>

If you find yourself losing your temper: <https://www.askamanager.org/2017/01/i-yelled-at-our-intern.html>

The best posts on Ask A Manager are clear, down to earth, and very specific — plus there are some truly memorable examples of people getting weird at work. (Good for the days when you need to tell yourself, “well at least nobody in my organization has done THAT”).

The downside is quotes like this:

“Your pay is about what your work is worth, both to your employer and on the market. It’s not a stipend that your boss gives you to cover your living expenses...You get to expect fair market pay for your work because that’s what it’s worth.”

Wow...that would be...amazing? I’d love to live in a world where that applied to delivering affordable acupuncture. However, if you really believe that, you’re probably not going to be able to function as an entrepreneur, particularly during the phase where you’re either working for free or actually paying somehow in order to build your organization. There were a number of years where I would have been over the moon to have a stipend that covered my living expenses while I was building my own organization. The reality of entrepreneurship is that you have to value your own work even when the market doesn’t seem to, enough to invest in your organization before it seems to have “worth” to other people, all in the hope of being able to eventually make a living doing work that you love. That’s potentially thousands and thousands of hours of unpaid, high-level work, and getting it done is, alas, not compatible with expecting fair market pay for all your efforts.

So I recommend Ask A Manager with the caveat that in general, there’s a thick layer of assumptions (including in the comments) that all organizations have middle class resources and middle class values, entrepreneurship is about money, and if your job isn’t working out, you can always find another one.

The Advantage: Why Organizational Health Trumps Everything Else in Business ¹⁹

What's good about this book is that it's relatively short and simple and it's intended to be "a practical approach to improving organizations". It's obviously written for a conventional business context, but the emphasis on simplicity and practicality means that, once you tune out the capitalism, it's not that hard to identify some straightforward, applicable strategies. If you feel completely clueless about managing organizations, this book is not the worst place to start.

Lencioni believes that certain organizations have an "advantage", which is organizational health, and organizational health means: minimal organizational politics and confusion; high degree of morale and productivity; and very low turnover of good employees (pg. 5). If you've been anywhere near the acupuncture profession, you probably know that many acupuncture organizations look like the opposite of this, and so any improvement over the baseline would be very welcome indeed. It was helpful to read that almost all organizations struggle to one degree or another with communication and accountability, and so making an organization healthier requires focused work in those areas — it's not going to just happen on its own, and if you're having problems there, welcome to the club.

Lencioni's roadmap for how to get to organizational health is: build a cohesive leadership team, create clarity, overcommunicate clarity, and reinforce clarity (help everyone remember, all the time, what's most important) — and also, have good meetings. These things are basic and doable even on a shoestring budget.

I agreed with a lot of what he had to say about building cohesive teams, particularly:

Teams are crucial to organizations, and mutual trust is fundamental to a high-functioning team. If members of a leadership team don't trust each other, there's not much use trying to address any other organizational problems.

A "behavioral profiling tool" can help with interpersonal dynamics. Some people hate any kind of "personality typing", for understandable reasons, but Lencioni advocates for it as a way for team members to approach each other's weaknesses neutrally. He recommends the Myers-Briggs Indicator. At WCA, we use the Enneagram, and we've found it incredibly helpful, both in terms of taking each other's quirks less personally and also in understanding that we're motivated differently.

¹⁹ Lencioni, Patrick. *The Advantage: Why Organizational Health Trumps Everything else in Business*. Jossey-Bass. 2012

One major thing I disagreed with:

In pursuit of greater accountability, Lencioni advocates for having a meeting off-site where team members confront each other about their weaknesses. Alison Green of *Ask a Manager* calls this particular idea “[spectacularly nutty](#)”. I think this is one of the places in the book where you can plainly see the assumption that everybody must have time, money, and social capital to burn in the name of improvement. If you have the resources to hire Lencioni’s company to consult about your organization, well, then you probably do.

We used parts of *The Advantage* to launch a restructuring of WCA, so for some practical details, please see the WCA Case Study.

Cometbus 59: Post Mortem ²⁰

[Buy it here](#) (and you should).

This is the only resource on this list which I think needs no translation at all to be useful, and that's because it's also a zine, written for punks – and in this case, punks doesn't equal community acupuncturists. Punks here means punk rockers and punk artists, and the zine itself is devoted to punk institutions: the rise and fall of, the care and feeding of, the promise and failure of. I'm not sure the author intended it to be hopeful and motivating, but I found it so encouraging that I bought multiple copies for WCA's management collective to read.

The author describes the intention for the zine as “a wide-ranging survey of the underground, a census of sorts, to look honestly at where we had succeeded and where we had fallen short... part inventory and part autopsy” of underground institutions. His examples include punk record labels, bookstores, Thrasher magazine, an experimental cinema, a radical luncheonette, a school for comics art, a Catholic Worker house, a squat that became a community arts center, and a literal sinking ship. What he wants to know from the people involved in these institutions is, “How did you form, and what do you fight about?”

His overarching question is, “could you establish yourself without becoming the establishment? Because that was the goal, as far as I was concerned: to build institutions that served our needs” (pg. 23) This is exactly what I want to know, always, about community acupuncture.

One of the most useful aspects of the zine for me was getting perspective on the internal obstacles to building counterculture institutions, particularly:

- 1) The pervasiveness and the destructiveness of infighting. For example, he describes “*an anarchist infoshop legendary for its catastrophic demise... first they managed to alienate everyone different from them, then everyone the same. Soon they were eating each other alive... There was more and more fighting over less and less at stake... (people) stumbled away from that crash embittered, vowing to steer clear of anything containing the word “community.”*” (pg. 48)
- 2) The difficulty – and the importance – of getting the people who benefit from counterculture institutions “*to be knowledgeable and involved about the business end of things*” (pg. 137), which, in my experience, has to include the nuts

²⁰ Cometbus, Aaron. Cometbus #59. Abacus Ex Press.

and bolts of the organization. A lot of people aren't naturally inclined this way, but institutions are like houseplants — if nobody takes care of them, they die.

As someone involved with the Riot Grrrl movement put it: be organized; have a clear agenda and vision, and back those ideas up with concrete goals; think ahead to see what might happen, and plan for it; read about other movements, and see where their pitfalls were. (pg. 14)

If you don't read any of the other resources on this list, read this one.

Pro Tip

For POCA Tech students: there's a copy in the library.

Nonprofit AF blog

When you're an unconventional nonprofit or a social business, you're a square peg in a round hole, constantly being reminded that the world wasn't designed for you. As a result, it's easy to assume that life is easier for "normal" nonprofits. This blog is the cure for all that.

<https://nonprofitaf.com/>

Vu Le

Anytime I've thought, "Oh, if only we could qualify for grant/foundation funding!", I just need to read a couple of Vu Le's posts to get back to, "Thank God we earn all our own money!" Not only is the grass NOT greener over there, some of their problems make entrepreneurship look like a picnic. Vu manages to present the structural problems with nonprofits in a humorous, totally entertaining way, but he doesn't downplay them at all.

In terms of understanding organizations, this blog reinforced for me the fundamental importance of cash flow: how you get your money will shape your organization. A lot of posts are devoted to describing how broken the relationship is between foundations and the nonprofits that depend on them, and how nonprofit organizations suffer as a result. Check out everything under this tag: <https://nonprofitaf.com/category/funder-relations/>

There's also a lot here about how much leadership can suck, along with some very funny descriptions of what being an Executive Director is like, for example: "The ED's job has always been like Sisyphus pushing the fundraising boulder up a hill, but while the eagle of program impact is pecking out his liver; the Cerberus of board, staff, and community expectations is chasing after him; and he's trying to avoid looking at the Medusa of cash flow projections." More under: <https://nonprofitaf.com/category/ed-life/>

If you think you are the only one having problems with leadership, read these posts (heck, read them anyway):

<https://nonprofitaf.com/2019/06/why-more-and-more-executive-directors-of-color-are-leaving-their-positions-and-what-we-need-to-do-about-it/>

<https://nonprofitaf.com/2018/11/the-wheel-of-disillusionment-what-it-is-and-how-it-destroys-relationships/>

In general, the filters needed for making this blog useful for punks are almost the opposite of the ones needed for *Ask A Manager*. This blog is written for people whose organizations are for the most part trapped in a difficult dynamic with foundations and other highly bureaucratic funding sources. The perspective on organizations is overall very useful, and it might make you grateful for entrepreneurship.

Some Other Books to Consider Reading

***Reframing Organizations: Artistry, Choice, and Leadership*, by Lee G. Bolman and Terrance E. Deal**

This is apparently kind of the bible for organizational management. It offers four different frameworks for understanding what's going on in an organization: the structural frame (organization as factory), the human resource frame (organization as family), the political frame (organization as jungle), and the symbolic frame (organization as temple). A central theme is that good leaders often need to use their knowledge and intuition to reframe what's happening in their organization in order to manage it. I found the case studies in this book helpful, especially the longer ones.

***Crucial Accountability: Tools for Resolving Violated Expectations, Broken Commitments, and Bad Behavior*, by Kerry Patterson, Joseph Grenny, David Maxfield, Ron McMillan, and Al Switzler**

This how-to book is written in an accessible, conversational style so it's easy to read. Accountability can be a difficult area to navigate, particularly for leaders, and this book offers a systematic way to think about handling accountability discussions. It's full of detailed strategies, helpful suggestions, real-world examples – and best of all, scripts. Highly recommended.

***The Hard Thing about Hard Things: Building a Business When There Are No Easy Answers*, by Ben Horowitz**

The main reason to read this book is to internalize the message that even venture capitalists and tech entrepreneurs (and successful ones at that) are mostly clueless about organizations and leadership. They're making it up as they go along and hoping for the best. There are some useful tidbits in here about leadership and communication, but mostly it's useful for a big picture perspective on starting a business and how hard it is, even when you have a lot of money. Don't read it if you can't stand big doses of tech-bro capitalism; one comrade I recommended it to was literally nauseated and had to put it down. I was so relieved to hear somebody admit that they didn't know what they were doing that it didn't bother me as much.

Part 5: WCA Case Study

WCA Case Study: A Work in Progress

2002: just me being an amœba sole proprietor (simplest social container)

I told this part of the story in [Acupuncture Points Are Holes](#): when I started a business, I had no idea what I was doing. I got laid off from my public health job and I had to earn a living somehow. Lots of people helped me, in different ways. I put the cash and checks that patients gave me into a checking account; I stuffed my receipts into an envelope; I filled out Schedule C (income from self-employment) at tax time.

2002-2003: sole proprietor + 1 receptionist/semi-volunteer

This is the part of the story (also in *Holes*) where my 72 year old neighbor, Ilse, came to my rescue and ran my front office, because she could see that I didn't know what I was doing. The business structure was not significantly more complex, overall; the biggest difference was that I had more money to put into my checking account because Ilse was reminding people to pay for their treatments. I paid Ilse under the table when I could.

2003-2004: 2 amœbas sole proprietors + 1 receptionist/semi-volunteer

My partner Skip joined me after he also got laid off from his public health job. The business structure still wasn't significantly more complex; there were just two of us doing the exact same thing, separately. Each of us stuffed our receipts into our own envelope; each of us had a checking account devoted to our practice; each of us filled out Schedule C at tax time. We split expenses like rent, utilities, and paying Ilse.

In terms of the growth of WCA as an organization, what mattered here was that our separate patient bases were growing, and also beginning to overlap. We were proving that there was a market for our unconventional way of providing acupuncture. Even though, organizationally speaking, we were still a couple of single-celled organisms, we were sharing resources (being partners in life as well as business made it easier) and our shared patient base at this time, maybe about 5000 treatments a year, was the foundation of what would become WCA's 61,000 treatments a year, 17 years later.

Another important element in the growth of WCA as an organization, which I'm pretty sure I've understated in the past, was our shared public health background. We were both used to treating marginalized people, and quite a few of them followed us to our new clinic when the public health clinic we'd worked for downsized. For us, these people were normal customers; we wanted to be able to serve them without treating them as objects of charity; and so we established early on a habit of dropping the low end of our sliding scale for anybody who needed it. This was never a big deal to us; it was just a part of doing business. For us, unlike many other community acupuncture clinics, middle class patients were not the default setting, the core of our patient base from which we were expanding. The default setting for our patient base was: people in recovery who

had graduated from a public health substance abuse program; retired people on low fixed incomes; and people from our working class neighborhood. We gratefully treated some middle-class people who came because they thought we were good acupuncturists and would follow us no matter how odd our practice setting, but they weren't our target demographic or anywhere near the majority.

2003-2004: detour — sub letters and an LLC

Because we had an absurdly big space, and because Portland had a lot of acupuncturists even back then, our first attempt at becoming a more complex organism was to create an LLC (limited liability company) in order to try to include more acupuncturists in our practice by subletting space to some of the practitioners who were curious about the weird new practice model we were using. In Portland, this is a common business model: an acupuncturist sublets space to other acupuncturists in order to share costs. It was logical that we would try this as a way to expand, but it was a total failure. The only thing good about this phase of our development was that it's an example of trial and error. We knew we wanted to expand, we didn't know how to do it, we tried something, we learned from it.

To be clear, the only thing that was more complex was, there was now a corporation involved (named Window of the Sky, for our favorite category of acupuncture points — yeah, we're nerds). The corporation had nothing to do with providing treatments; it was set up to take rent payments from our sub letters, of which at one point there were maybe eight? (We really didn't know what we were doing.)

Here's what we learned from this phase, though we couldn't have articulated it at the time. We both knew, instinctively, that our practices were viable because each of us worked at building a base of patients who wanted to be treated by us. Later on, I would describe this as the practitioner being a nucleus surrounded by a little electron cloud of patients, held in place by bonds of relationship and attention. I had a knack for being a nucleus; Skip was learning. Some of our sub letters had potential for being a nucleus, but unfortunately the patients they attracted into their little electron clouds were really different from ours (see above: our default setting was different from most acupuncturists). The majority of our sub letters, however, had no clue at the time that their first job was to be a nucleus of attraction and they would have to work at building a patient base. They thought that by paying us rent, we would provide the patients — and to some small degree, because of the growing patient base that we had, we did. But often our sub letters didn't like our patients or couldn't keep them. Above all, every acupuncturist working in that building was still a single-celled organism. Skip and I wanted to be something other than amoebas, but we didn't know how. Eventually all of our sub letters left or were asked to leave.

2005 – 2010: first attempt at real organization — Professional Corporation with a business manager

About two years in, one of my patients approached me about helping to grow the clinic. We became friends; she became our business manager; ultimately the relationship crashed and burned spectacularly for reasons I mostly won't go into here, but once again we learned a lot.

Just like our prior experiment with being a landlord in the form of an LLC, this attempt at organization was based on a template that was common (but that wouldn't work out for us): a model in which acupuncturists treated patients and a non-acupuncturist business manager handled all the administrative functions. We weren't making enough money to afford a business manager, really, but we thought there was a good chance that having a business manager would help us get there, and to a degree, this was true. One of the reasons that it didn't work out was that we weren't making enough money to pay our business manager what she thought she deserved, but we tried to do it anyway, with predictably stressful results. Another reason that it didn't work was that none of us knew enough about organizations to recognize that we needed some kind of accountability structure for our business manager, and by the time it became clear that we did, it was too late.

What happened in terms of organizational structure: we became a Professional Corporation (PC) named Working Class Acupuncture, and everyone who worked for the clinic (acupuncturists, receptionists, business manager) became an employee. By this time, I was delighted to say goodbye to Schedule C and my envelope of receipts; certain aspects of being an amoeba were wearing on me. We became a PC rather than any other kind of corporation because our accountant instructed us to; we folded up the LLC because we didn't want to be a landlord anymore.

At this point we investigated becoming a nonprofit, but at the time (2005, before the recession) the IRS' rules were restrictive enough that our accountant advised against it. Nobody could really conceive of a nonprofit that mostly earned its own money instead of depending on donations, so we ran into obstacles at every turn until we finally gave up. Around this time was when I started describing WCA as “a social business” because it was clear our priority was giving treatments and creating jobs rather than making a profit.

2005 was also when we hired our first acupuncturist employee, Moses. Over the next couple of years, we hired a couple more acupuncturists and a couple more paid receptionists. We would never have gotten to this level of complexity — basically a stronger container in which we could grow — if we hadn't had a business manager. Even though we were making mistakes left and right, we were in the process of growing a spine, a heart and a brain; finally, we were more than just a bunch of single-celled mouths.

One important note: there's a big hurdle in between being a sole proprietor and having a corporation with employees, and that's minimum wage. Employees have to be paid at a regular rate, and so you can't have them until you're consistently bringing in a certain amount of money. For most small businesses, this hurdle is a pretty terrifying leap. Don't underestimate it.

2006 – 2011: detour: CAN (501c6 nonprofit) and POCA (multi-stakeholder cooperative)

Another thing having a business manager allowed us to do was to start on our project of open sourcing the community acupuncture model: persuading other acupuncturists to adopt it so that 1) they would treat our patients' relatives in other cities, and 2) we could all compare notes. With support from our business manager, Skip and I spent five years or so going around the country giving workshops on "Community Acupuncture 101". In 2007, we put together a 501c6 nonprofit, the Community Acupuncture Network. In 2011, working with other CAN members, we transitioned CAN to POCA, a multi-stakeholder cooperative for community acupuncture patients and providers. The core of both organizations was a knowledge commons: community acupuncturists sharing information and support. Both CAN and POCA functioned like a laboratory for the community acupuncture model; open sourcing is very valuable because you can access many people's trials and errors, instead of just your own.

2010 – 2015: Professional Corporation with a Management Collective

Circa 2010, the relationship with WCA's business manager fell apart and she left. Skip suggested that we create what he called an "oversight committee" to take over the administration of the business, composed of the most committed full-time acupuncturists. Around this time, we also developed further what we'd been calling "modules": chunks of administrative work that we tacked onto punks' jobs as a way of both getting things done and paying them a little more. In the absence of a business manager, it became clear that the modules were the foundation of WCA's administration. Some of the modules were: Clinic Manager (by 2009 we had two clinics, and by 2012 we had three); Scheduler; HR Paperwork (there's a lot of paperwork involved in employing people); Finance (tax preparation, bookkeeping, etc); Supplies. Some of the modules were larger and more time consuming than others, though all of them were meant to take up between 5 and 10 hours a week. The punks with responsibility for the larger modules ended up on Oversight, which was usually about six people and met weekly. This was the phase where we started having up to date job descriptions, regularly scheduled meetings, and other indications that we might be grown-ups.

Oversight was our management structure, but Skip and I still owned the business; this wasn't a perfect fit. Also, apart from Oversight handling a lot of WCA's functions, we weren't able to provide much actual management to WCA employees. It was generally understood that punks mostly had to manage themselves, and their main responsibility was creating and maintaining enough of a patient base that WCA could keep issuing their paychecks. Our primary means of evaluating punks was their numbers: how many treatments were they doing?

We got better at articulating the reality that, even though punks were employed by WCA, each person actually had to create the economic foundation for their job because *clinics don't attract patients, punks attract patients*. Our goal was mostly to be a decent alternative to each punk having to create and maintain their own individual social container; to share the work of building up a large, robust, stable patient base that could support all of us in making a living; and to pay punks well enough that, once they got the hang of maintaining a patient base, they didn't immediately want to quit — because they wouldn't make *that* much more money out on their own, they would have to do a lot more work, and they'd miss all the different kinds of support that WCA provided.

Knowing our structure wasn't perfect, around this time we investigated the possibility of becoming a worker cooperative. It didn't pan out, because the premise of a worker cooperative is that there's some advantage to being an owner of the business. In WCA's case, there wasn't. We weren't making enough money for profits to be an issue; we were basically breaking even. For me and Skip, being owners meant doing any administrative work that the modules didn't cover (meaning work we didn't have money to pay for), and sometimes, there was a lot.

This phase also represented our first serious foray into team building, with Oversight. Once again, we didn't know what we were doing, but we got very lucky and Oversight became a healthy, productive team, mostly as a result of just working together to keep WCA running.

2014: detour — opened POCA Tech, a 501c3 nonprofit acupuncture school

Almost all of the community acupuncture clinics in first CAN and then POCA that tried to hire acupuncturists had so much trouble finding good hires that it was almost a running joke, except that we were only laughing to keep from crying. In between 2005 and 2019, WCA hired a total of 50 acupuncturists; only 16 of them lasted. Some never made it out of training; a few had to be fired; a lot quit. Skip and I had many fights about starting our own acupuncture school; he said that it would be much harder than I thought, a potentially hellish undertaking, and I said that if we didn't start our own acupuncture school, community acupuncture in general and WCA in particular would have no future. As it turned out, we were both right. It was a lot harder than I thought and there were some hellish moments. Also, by 2019, WCA's only new hires were graduates of POCA Tech, and enrollment in other acupuncture schools was in steep

decline. If we hadn't had POCA Tech as a source of acupuncture staff, we would have been in the process of downsizing our clinic capacity. And because of the highly bureaucratic nature of starting a school and getting accredited, we learned a tremendous amount about organizational structures that would ultimately benefit WCA.

2015 – 2019: 501c3 Nonprofit with a Management Collective

In a conversation with our accountant about possibly becoming a worker cooperative, she commented, “The thing about owning your particular business is, it’s all risk and no reward.” We thought about that, and also about the fact that one other POCA clinic had figured out how to become a nonprofit, and came back to her and asked, “So if there’s no upside to ANYBODY owning WCA, can we look at becoming a nonprofit again?” By then, the IRS’s rules had changed, and it turned out to be possible, although the conversion was a nightmarishly bureaucratic process that threatened to go off the rails multiple times. As of 2015, though, Working Class Acupuncture was no longer a PC, it was an official 501c3 nonprofit. We put together a small Board of Directors, bought Directors’ and Officers’ insurance to protect them, and pretty much went about our business in the exact same way we had before, though with some distinct new advantages (see section on becoming a nonprofit). Working Class Acupuncture was officially owned by the community.

2020: in development — 501c3 Nonprofit with “Web of Inclusion” organizational structure

One problematic issue that we’d known about for a long time was succession planning. We had figured out that it wasn’t worth it for anyone but the community to own WCA; nonetheless, our business structure retained a lot of (problematic) vestiges of Skip and I being the owners. It was clear that if we disappeared, those problems would just settle on the shoulders of the rest of Oversight: same burden, different people carrying it, not actually more sustainable. We needed a structural solution directed at distributing responsibility (and compensation) more fairly. One of WCA’s biggest challenges over the better part of two decades has been trying to afford the management structure we actually need, instead of having people do organizational work they’re not paid for.

Over the years, we’d had several different business coaches, some much more helpful than others. We learned enough from them to have a clue that we needed a new approach to management and a new organizational structure. Oddly enough, the only reason we’ve been able to spend enough time working on this to get anywhere is because of the existence of POCA Tech. When I became its executive director, I had to stop being a punk. I’ve always thought of punking as being a lot like a computer program that took up tremendous space on my personal hard drive. Once I gave it up, there was a lot more room to focus on organizational issues, not just POCA Tech’s but WCA’s. Please see the next section for a detailed description of our ongoing process.

In hindsight, it's clear that as a business, WCA has always had three products: affordable treatments, jobs for community acupuncturists, and organizational structure. A lot of the structure we built first wasn't for WCA itself: it was for CAN, POCA, and eventually POCA Tech. I think we had to do these other projects, though, before we could design a more functional organizational structure for WCA itself — because making CAN, POCA, and POCA Tech taught us about the community acupuncture model. At the beginning, we just didn't understand it enough to build something that would meet our needs for the long-term (and of course without POCA Tech, there would *be* no long-term).

In the book *Reframing Organizations: Artistry, Choice, and Leadership*, the authors note that most organizational structures were designed by men; women don't get to design organizations very often. When they do, though, the structures often look different: “webs of inclusion” as opposed to top-down hierarchies. I'm pretty sure that whatever long-term structure WCA settles into will be some kind of web of inclusion, built incrementally out of trial and error.

WCA “Advantage” Process: January — March 2020

In the first Praxis book, I described one of WCA's misadventures with a well-meaning business coach who led Oversight through a disastrous team-building exercise. (It did turn out to be team building, I guess, but not in the way he intended.) Anyway, he gave us some useful ideas, though we definitely weren't a fit in working together. A couple of years afterward, I came across the book *The Advantage* by Patrick Leoncini (see section on Resources) and thought, Ohhhh — this is what our ill-fated business coach was trying to do! This might actually work IF it was implemented by somebody who understood WCA, meaning one of us — okay, meaning me, because I'm the only one who has the bandwidth. So, I set out to apply the book to our needs.

The first idea that seemed applicable was Leoncini's idea of a “playbook”: a summary of some core things about the organization that everyone could refer back to, and that was disseminated through the organization as a means of communication. One of WCA's big structural problems was a division between the punks of Oversight and the rest of the punks. Oversight punks were often frustrated that other punks didn't seem to “get it” and non-Oversight punks had no consistent way of giving input on Oversight's decisions. (This replicates a tension in lots of small businesses between owners and employees.) The first step in resolving that division, according to Leoncini, was to create a tool — the organizational playbook — to get everybody on the same page and keep them there.

Here's the playbook we wrote in a January 2020 retreat:

WCA Organizational Playbook

Our wealth is in our activity...but it is fatuous to “do what you love”. The point instead should be to make an economy, at whatever scale is possible, whose work deserves the affection of whoever joins in it.

Jedediah Britton-Purdy on Wendell Berry

Why do we exist?

To make acupuncture accessible to ordinary people (as many as possible!) in the context of a broken healthcare system, as a form of prefigurative intervention (<https://beautifultrouble.org/tactic/prefigurative-intervention/>)

What are our core values?

honesty/transparency

trust/be trustworthy

We trust

in acupuncture as a standalone intervention

that patients are paying what they can afford

Miriam Lee 10

each other

simplicity/consistency

humility

work with what we've got/be down to earth/be grounded/accept limitations, our own and our patients'

passion

take responsibility for our shared clinic space/organization/social container

What do we do?

We provide low cost acupuncture in a trauma-informed community setting.

How will we thrive?

By keeping everything simple while orienting ourselves to a big vision; by staying focused on our core values and doing a few things that we're really good at; by sharing and open-sourcing; by thinking holistically about our impact on all parts of our organization; through our long-term commitment.

What is most important, right now? (1st quarter 2020)

Developing support, input, and accountability structures for punks; laying the groundwork for building new teams and including more people in administration and management; developing Finance Circle's systems and capabilities (budgets, data-gathering); revisions to volunteer program

Who must do what?

Cera Mae, Skip, Moses: meeting with punks, in groups and one on one as needed
Cortney, John, Lisa: developing Finance Circle
Lisa: keeping track of and facilitating overall organizational process; working with reception managers as needed

Management Team Profile

Cera Mae: Enneatype 2, Hillsdale Clinic Manager, punk development
Cortney: Enneatype 9, Finance Circle OL, oversees finance systems
John: Enneatype 9, HR Manager, developing data gathering
Lisa: Enneatype 8, organizational development and structure
Moses, Enneatype 1, Rockwood Clinic Manager, punk development, and accountability structures
Skip: Enneatype 2, Cully Clinic Manager and Scheduler, punk development

WCA's COVID-19 Process

We were having a great time playing around with some of the concepts in *The Advantage* right up until March 17th, 2020, at which point we shut down completely for four months. This was a shock, because in the last eighteen years, WCA hadn't been closed for more than a few days at time (and only in instances of very bad weather). It felt like being in suspended animation.

As the shock began to wear off, though, the shutdown started to look like an opportunity. Sometime in May, I wrote this to our management team:

I think it's most useful if we imagine WCA responding to the shutdown by using it the way a caterpillar uses a cocoon. Here's a fun description of exactly what happens inside the cocoon when a caterpillar becomes a butterfly:

<https://www.scientificamerican.com/article/caterpillar-butterfly-metamorphosis-explainer/#:~:text=One%20day%2C%20the%20caterpillar%20stops,as%20a%20butterfly%20or%20moth.>

The shutdown is our chance to address a couple of longstanding, stubborn problems affecting WCA's sustainability: reception and succession planning. These problems can't be fixed by patching our existing systems with duct tape and hope (our preferred approach). It would be best to actually melt down the whole organization and reform in a completely different shape, the way a caterpillar digests itself into a protein-rich soup, and then uses it to rebuild a new structure. Under normal conditions, we could never do this because of the energy it would require; also,

probably none of us could stomach that level of disruption.

But these aren't normal conditions. COVID is doing a lot of the work for us — at least the disruption part. We just have to be willing to rebuild and not go back to the way we were. Realistically, we probably don't have a choice about that either; if we want to survive whatever is coming next with the economy, we're going to have to be different. The whole world is going through a similar adjustment, which helps. So, I think it's best for us to embrace this weird time as a container for transformation, and just really go with it.

People responded positively (possibly because everyone was kind of in shock?) so we went for it.

The first thing we did was to make a list of administrative responsibilities, called “All the Things”, and send it around to the punks that we could imagine initially re-hiring, to see who was interested in doing what. Part of making the list involved Skip and I wracking our brains to articulate what felt like tiny details of the invisible labor of being owners, so it was a useful exercise even before anybody else saw it. Here's what it looked like after a couple of passes:

Administrative Overview of WCA (All the Things)

Cash Flow

- Developing/maintaining reception systems for taking in cash (in development)
- Managing volunteer/paid receptionists
- Managing payroll/interfaces with payroll company/managing employee hour recording
- Bookkeeping
- P & L statements
- Annual budget
- Monthly bill paying
- Contract management
- Vendor relations
- Buying supplies (clinic managers)
- Bank deposits (clinic managers)
- Managing inventory
- Manage online punch card purchases
- Ship merchandise for online store

Communication

External organizational communications: website, patient email blasts, etc
answer info@wca email
Internal communications: staff newsletters, all staff emails
Internal communications: sharing data and information in response to requests
(example: P &Ls, payroll info)
happy birthday/pie cards
Clinic manager communications: responding to patients
Clinic manager communications: responding to punks
CODA manager: interface with CODA admin, communicate w/WCA accordingly
Onboarding new punks
Managing all punk meetings
making sure all employees are kept up to date on WCA's finances (future)
articulating mission, vision, objectives
staff nights out
staff development/succession planning (future)

Accountability

tax prep
tracking and complying with employer regulations
OSHA compliance/safety meetings/OSHA manual
Order, pick up and removal of sharps disposal
AERD tracking and maintenance
tracking treatment numbers (clinic managers)
tracking treatment numbers (punk development)

Decision-making

clinic managers: day to day operations
hiring
collective decision-making-- operations planning (currently: oversight)
collective decision-making — participating in a GC (future)
Finance decision-making (includes scheduling and prepping finance circle meetings)
BOD maintenance and management: scheduling meetings, keeping BOD members up to date, etc.
Long range planning

Organizational Infrastructure/Bureaucratic Paper Trail

HR paperwork and records
answering external surveys, responding to external paperwork like employment confirmation
W-2s
Scheduling punk shifts in PP, finding subs and filling shifts as needed. Keeping online clinic hours accurate, vacation calendar, etc (clinic managers)

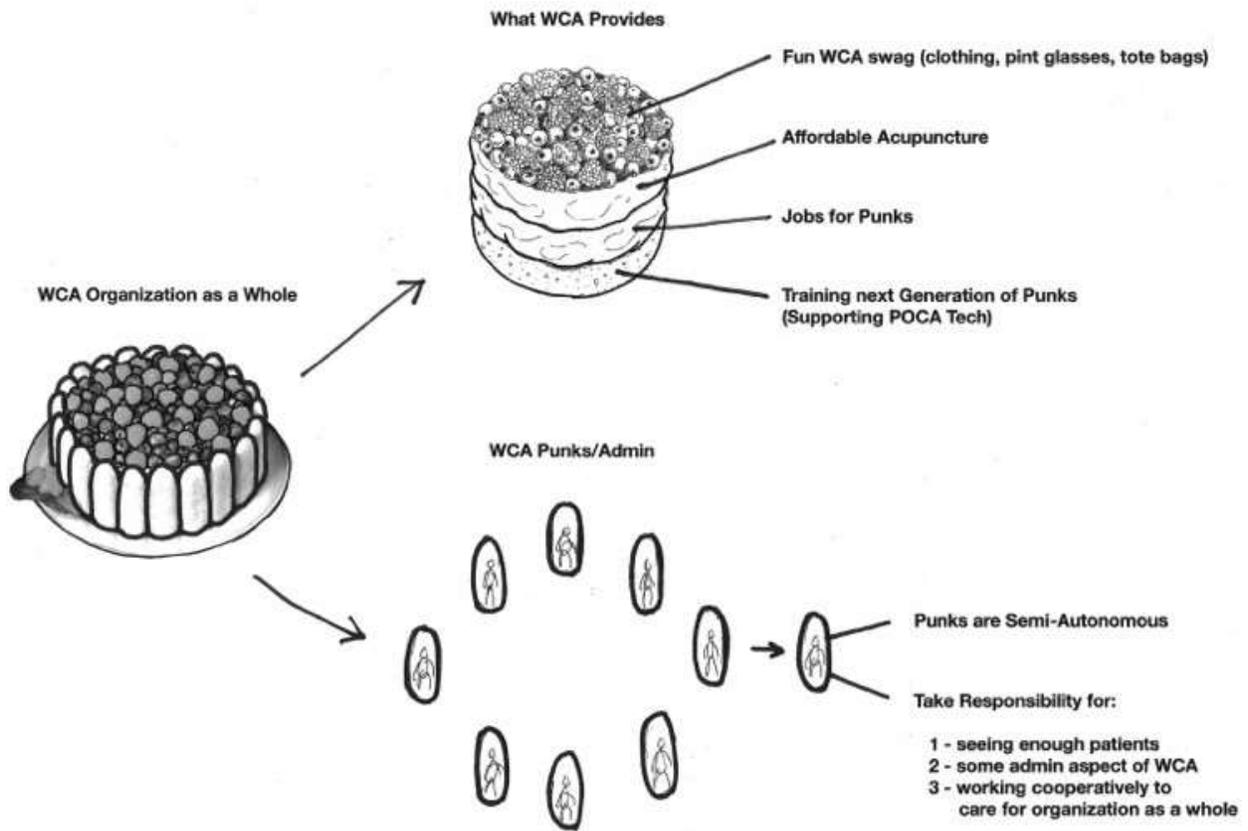
Master scheduler tasks - oversees whole calendar, anticipates needs, interfaces with Wade
workers comp audit, insurance renewals, renewing licenses
CEU coordination
benefits management
phone plan
maintaining financial records
meeting minutes
nonprofit compliance
maintaining policies and manuals

Volunteers: Recruit, orient, and train volunteers for WCA; Train and orient POCA Tech students at the front desk; Respond to all volunteer enquires; Manage volunteer paperwork; Manage and revise the volunteer manual; Create and manage master recruitment plan for volunteers.

As we discussed WCA's organizational structure, what emerged was a kind of weird three-dimensional Venn diagram of overlapping functions, which was also a fractal reflection of how punks manage the treatment room: we all "hold the space" when we're in it. The concept was definitely non-linear and hard to imagine as a typical "organizational chart". I realized that WCA's organizational structure could be represented, sort of, not by a typical organizational chart but by — bear with me here for a minute a *Charlotte cake*. I would have no idea what a Charlotte cake was if I hadn't been binge-watching all the seasons of The Great British Baking Show with Skip. Basically, you make a Charlotte cake by first baking a bunch of ladyfingers, then carefully overlapping them inside a cake mold so that they form a kind of pretty

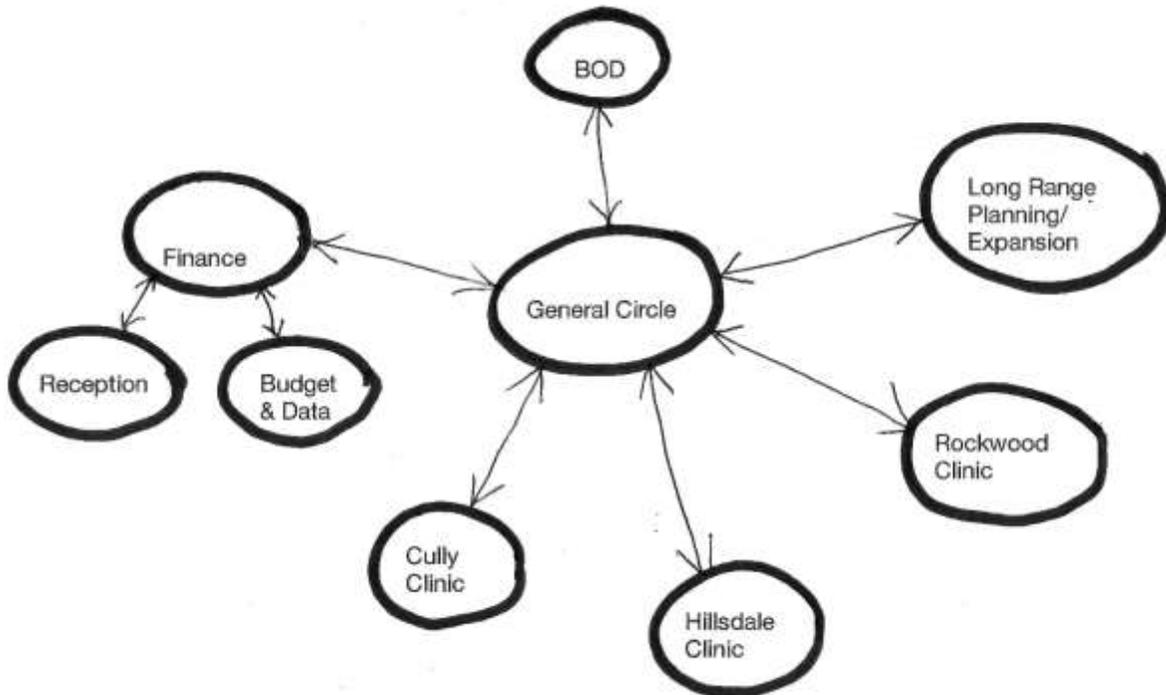
container, then inside the container you put a layer cake or a custard or a fruit puree or some combination of all of those.

Moses drew it:



The second thing we did was to dissolve Oversight and to re-form as a modified sociocracy.

WCA Sociocratic Communication Circles



The third thing we did was to enlist one of WCA's Board members, Lisa Achilles, to oversee our succession planning efforts. Lisa Achilles is a therapist and a personal coach with long experience of both organizations and entrepreneurship. She began holding meetings every six weeks, to which all WCA staff were invited, to talk about what leadership looks like at WCA.

Fourth, I wrote some more things about leadership, relative to succession planning.

Leadership Fairies and Succession Planning

Lately I've been taking inventory of what I learned about leadership, when, and where, and I was surprised to discover that a formative influence was the Brownies, circa 1975.

Back then, the Brownies were the first level of membership in the Girl Scouts, and you could join in first or second grade. I was very, very shy, and I didn't want to join, until I figured out that Girl Scouts was a way to spend time in nature — and so I ended up staying in Girl Scouts well into high school. Girl Scouts is among other things a leadership development program — but I think I learned some unintended lessons.

The Brownies are named after a type of fairy in British folklore, a household spirit who emerges after the family is asleep to take care of household chores. Brownies clean, organize, make desserts (hence the chocolate squares named after them), and repair anything broken. They're meant to be a model of helpfulness for children, particularly in regard to doing chores without being asked. I remember listening to my troop leader telling us the legend of the Brownies while we sat cross-legged in a circle on the floor, fidgeting in our brand-new uniforms.

And I've been unconsciously applying the Brownie model to my own practice of leadership ever since.

Initiating useful work without having to be asked, paying attention to other people's needs, taking care — these are lovely things. Service makes us more human. Leadership has a lot of overlap with initiating, paying attention, caretaking and service — but leadership also has the potential to turn into staggering amounts of invisible labor, and somewhat late in the game, I've figured out that's a problem. You can get a lot done by doing leadership in the Brownie model, but there are some major drawbacks.

First, I recognize that I adopted the Brownie model in reaction to other models of leadership that aren't good, namely the default setting in our culture that confuses leadership with unearned confidence, egotism, and self-promotion. There's a reason that a lot of unqualified men become leaders (<https://hbr.org/2013/08/why-do-so-many-incompetent-men>); there's a reason to be alert to the potential overlap of leadership and oppression. I didn't want to be That Guy.

The problem of course is that in leadership, as in lots of other areas, not doing the *wrong* thing isn't enough; there's a lot of detailed, thoughtful work required in order to construct the *right* thing. In my experience, mostly the right thing needs to be *built*. If

you're so busy not being That Guy that you can't build anything new, then you're stuck in reaction to everything you don't want and you're not actually getting anywhere. I thought my only choice was to be the leadership fairy or to be That Guy, which prevented me from approaching the problem of leadership more creatively.

Second, leadership is work, sometimes very hard work, and doing it invisibly contributes to people taking it for granted, which makes it less sustainable. In my aversion to being That Guy, I created the organizational equivalent of people expecting that the house somehow just cleans itself, and the tasks of leadership get done by unseen — and unpaid — hands. Some scholars of folklore theorize that pre-industrial people needed the idea of Brownies to help them come to terms with the unending, repetitive need for labor, particularly in farming communities. The work of maintaining an organization is also potentially overwhelming, and in some ways it was easier for me to do it (out of sight, as much as I could) than to really think out *how* it needed to be done, particularly in terms of what support I needed from other people.

This all probably sounds bonkers (like, how could I have ever thought being a leadership fairy was a good idea, let alone tried to do it for a decade or so?) but it's actually not uncommon in the context of small businesses. A lot of small business owners don't want to be That Guy in relationship to their employees — they might have become small business owners in part because they were sick of having bosses themselves. Creating jobs is an amazing thing to do, and they feel inspired to do it. Unless you've built a small business yourself, you're likely to take the existence of jobs for granted, and so small business owners end up playing the role of organizational fairy for their employees, getting everything done that needs to get done so that everyone's job can continue to exist, but doing it behind the scenes — the equivalent of Brownies magically cleaning out the fireplace, churning butter and darning socks every night — and not really getting paid for it, because there isn't any money to spare.

The concept of entrepreneurship gets wildly distorted in capitalism, so that not just employees but everyone thinks that running a business is much easier and more lucrative than it actually is, and that a business owner who has employees is automatically benefitting financially. (Magical thinking!) In short, there's an enormous amount of invisible labor involved in employing people; at some point making it visible just feels like even more work, and so it's easier to just keep doing it than to try to tackle everybody's misconceptions.

The only reason I decided I had to make the invisible labor visible is the third drawback of the Brownie model: if you're doing all the leadership work so that (mostly) nobody

will notice, nobody else can learn how to do it. Yes, we're talking about succession planning, something else that a lot of small business owners are just too tired to think about. A lot of (unusual) factors came together to make it possible for me to think about it before I actually had to retire, and as soon as I did, I realized that I didn't want to find my business *another* leadership fairy to replace me. What I really needed to do was to get my organization to the place that it didn't depend on leadership fairies at all.

Which would require getting all the tasks of leadership out into the light of day, so that we could have a thoughtful, grown-up, non-magical conversation about how to distribute them.

“Followership Training” and Succession Planning

My friend Jade is a major geek about organization and governance, so we talk about those things a lot, particularly how to demystify them. One day she commented, “You know everybody thinks leadership training is so awesome, it’s such a hot topic, but a lot of the time what would actually be more useful for organizations is follower-ship training. Because the idea that everybody is going to be in a leadership role all the time is just absurd.” She continued, “A couple of years ago, the local university sent some business students to my clinic to do an internship, and of course what the students wanted to practice was leadership and management. And of course, what I *didn’t* want is for these 20-somethings who know nothing at all about my business to come in and try to lead and manage it for me. They certainly could have learned some things from being interns in a small business but practicing leadership at that moment wasn’t one of them.”

Like Jade’s other observations, this struck me as a shining example of good sense, on multiple levels.

For one, if everyone got both leadership training and followership training, more people might be willing to be leaders — not just because the relationship between leaders and followers could be more transparent and less mystifying, but because there’s a chance that people might treat their leaders better and thus make the leadership job easier and more sustainable. Outside of the corporate world where leadership is glorified (fetishized?) and used as a reward (often inappropriately, see also: the Peter Principle https://en.wikipedia.org/wiki/Peter_principle) a lot of people *don’t* want to be leaders, for good reason.

Also, if everyone got training in how to both lead and follow, it would make it much easier for people to switch roles as needed. One of the solutions that’s been floated for executive burnout is to limit people’s time in executive roles, but I haven’t seen an actual plan anywhere for how to rotate people in and out.

In the context of WCA’s succession planning process, I’m thinking a lot about how great it would be if we could figure out a kind of integrated leadership/followership training. The organization would have much better odds of surviving long term if everyone who worked in it had the ability to wrap their brains around the entire organization as opposed to just focusing on their individual part of it; if we all agreed on exactly what leaders are supposed to be doing; and if we had clear, agreed-upon accountability processes for both leaders and followers.

In our Oversight conversation, we realized two things:

- 1) Although we each have administrative modules with job descriptions, in reality the work of running WCA happens not just within our distinct job descriptions but in their overlap, and there is a LOT of overlap. In fact, each of our modules overlaps with somebody else's module to a greater or lesser degree. It's like a big, weird, three-dimensional Venn diagram.
- 2) The way our modules overlap and the way we all relate to running WCA as an organization has a fractal similarity to the way that all of us run a treatment room as punks. Most of us have worked shifts where we overlap with another punk in the treatment room, and over the years, we've all figured out how to do that smoothly. It requires both punks on the shift to take responsibility for the treatment room as a whole rather than narrowly focusing only on their own patients. The glue between us, administratively, is that we're all participating in caring for the organization (or whatever parts of it that our jobs show us) and we all expect to pitch in, do what needs to be done, and also get out of each other's way as needed.

Running WCA as a whole requires holding space in the same way that punks hold space, and the organization works best when everybody is taking responsibility for administration in the same way that good punks take responsibility for the clinic when they're punking. Where we tend to have problems is dealing with people who, one way or another, don't help us with holding space for the organization as a whole — just like it's problematic to work with a punk who doesn't pay attention to the treatment room.

If you could have a Charlotte cake where somehow all of the ladyfingers overlapped (a fourth-dimensional Charlotte cake?), and the filling was not sponge cake or custard but jobs created and affordable treatments provided, well, that would be WCA. Notice how it's not a top-down chart, it's a *cake*, which is so much better.

So what leadership/followership training at WCA would mean is that everybody got a thorough orientation to our fourth dimensional cake, and everybody understood how to be an overlapping ladyfinger, and also what each of the other ladyfingers was responsible for.

Conclusion

Writing this zine and trying to create the resource I wish I'd had at the beginning of my career has made me even more aware of the problems with leadership and organizational management in our culture — but also of the need and potential for a different approach.

Some of the most satisfying aspects of punking are related to the way that community acupuncture flattens hierarchies and opens up space for solidarity. For people who have had bad experiences in healthcare settings, an atmosphere of transparency, collaboration and support is a healing element all on its own, in addition to what the needles can do. There's a huge need for the equivalent in organizational management.

Flattening hierarchies isn't the same as just squashing leaders, however. Like punking, leadership is a technical job; in its absence, organizations suffer. Just like punking demystifies acupuncture and makes it more accessible and more sustainable, demystifying leadership and distributing its functions throughout an organization open up creative possibilities, particularly for organizations with limited financial resources.

Leaders need to be paid for leading — but not paid dramatically more than everyone else. Leaders need to be supported in ways that other workers are supported, rather than put on pedestals to be alternately worshipped and torn down. Leadership functions need to be distributed thoughtfully and systematically throughout organizations, so that more people can develop competence in leading. Like punking, you can learn to lead by doing it, but you need opportunities to practice.

What I hope for is an approach to leadership and organizational management that's both more pragmatic and more open-minded, less romanticized and more creative. I'm looking forward to seeing what collective solutions future punks come up with, and how many more people might have access to acupuncture as a result.

Acknowledgements

We needed this workbook for a long, long time before we actually had it. Heartfelt thanks to the comrades who helped bring it into physical form:

Gail Roudebush, for cheerfully taking on the creation of yet another eBook, for kind and thoughtful editing, and for all the encouragement.

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Wade Phillips, for wrangling the IT and the kittens.

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POCA Tech students, for asking good questions.

My WCA comrades, long-time and new, for wandering through the wilderness of building a counterculture institution, for talking about it, and for going out for socially distanced beverages during a pandemic and talking about it some more, particularly: Moses Cooper, Cortney Hartman, John Vella, Sarah Evans, Sonya Gregg, Rachel Lutz, Haley Merritt, Whitsitt Goodson, Erin Engelke, and Lisa Achilles.

And to Skip as always, for everything else.

Appendices

Sample Accompanying Documents and Narrative from Completed IRS 1023 Application

ARTICLES OF INCORPORATION

{OPEN Acupuncture Project Inc.TM ~ A Vermont Non-profit Corporation }

ARTICLE I: NAME

1.01 Name

The name of this corporation shall be OPEN Acupuncture ProjectTM. The business or trade name of the corporation may be conducted as OPEN Acupuncture ProjectTM.

ARTICLE II: DURATION

2.01 Duration

The period of duration of the corporation is perpetual.

ARTICLE III: PURPOSE

3.01 Purpose

OPEN Acupuncture ProjectTM is a non-profit corporation and shall operate exclusively for charitable purposes within the meaning of Section 501(c)3 of the Internal Revenue Code, or the corresponding sections of any future Federal tax code. Our mission is to provide affordable, accessible, and easy-to-use healthcare options for everyone in our community through acupuncture and herbal medicine. Our purpose is to improve the quality of life for our patients and their families by providing substantial support for their health, including relief of pain; reduction in the frequency, duration, and intensity of distressing symptoms; and prevention of the onset of acute and chronic diseases. We provide services to all individuals, regardless of gender, sex, race, color, income, national origin, age, ability or disability, marital status, familial situation, religion, size and shape, sexual orientation, or political beliefs. Our patients' access to and level of care are never based on any of these factors. We actively promote our services to patient populations who have unmet healthcare needs. We are a Community Acupuncture Clinic, as defined by the People's Organization of Community Acupuncture (POCA), a national professional cooperative organization that promotes affordable, accessible acupuncture. This means we abide by stringent POCA guidelines for maximizing public access to our services, and therefor qualify for inclusion in the national database of Community Acupuncture clinics. There are currently more than 20 community acupuncture clinics with 501(c)3 status. The clinic provides neither emergency medical care nor primary care. Referrals to emergency care resources and primary care physicians are made as necessary and as expeditiously as possible.

3.02 Non-Profit

OPEN Acupuncture Project™ is designated as a Vermont non-profit corporation.

ARTICLE IV: NON-PROFIT NATURE

4.01 Non-profit Nature

OPEN Acupuncture Project™ is organized exclusively for charitable purposes including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)3 of the Internal Revenue Code, or corresponding sections of any future federal tax code. No part of the net earnings of OPEN Acupuncture Project™ shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof.

Notwithstanding any other provision of this document, the corporation shall not carry on any other activities not permitted to be carried on (a) by any organization exempt from federal income tax under section 501(c)3 of the Internal Revenue Code, or corresponding sections of any future federal tax code, or (b) by an organization, contributions to which are deductible under section 170(c)2 of the Internal Revenue Code, or corresponding sections of any future federal tax code.

OPEN Acupuncture Project™ is not organized and shall not be operated for the private gain of any person. The property of the corporation is irrevocably dedicated to its educational and charitable purposes. No part of the assets, receipts, or net earnings of the corporation shall inure to the benefit of, or be distributed to any individual. The corporation may, however, pay reasonable compensation for services rendered, and make other payments and distributions consistent with these Articles.

4.02 Personal Liability

No officer, director or employee of this corporation shall be personally liable for the debts or obligations of OPEN Acupuncture Project™ of any nature whatsoever, nor shall any of the property or assets of the officers or directors be subject to the payment of the debts or obligations of this corporation.

4.03 Dissolution

Upon termination or dissolution of the OPEN Acupuncture Project™, any assets lawfully available for distribution shall be distributed to one (1) or more qualifying organizations described in Section 501(c)3 of the Internal Revenue Code of 1986 (or described in any corresponding provisions of any successor statute) which organization or organizations have a charitable purpose which, at least generally, includes a purpose similar to the terminating or dissolving corporation.

The organization to receive the assets of the OPEN Acupuncture Project™ hereunder shall be selected by the discretion of a majority of the managing body of the OPEN Acupuncture Project™ and if its members cannot so agree, then the recipient organization shall be selected pursuant to a verified petition in equity filed in a court of proper jurisdiction against the OPEN Acupuncture Project™ by one (1) or more of its board of directors, which verified petition shall contain such statements as reasonably indicate the applicability of this section. The court upon a finding that this section is applicable shall select the qualifying organization or organizations to receive the assets to be distributed, giving preference if practicable to organizations located within the State of Vermont.

In the event that the court shall find that this section is applicable but that there is no qualifying organization known to it which has a charitable purpose, which, at least generally, includes a purpose similar to this corporation, then the court shall direct the distribution of its assets lawfully available for distribution to the Treasurer of the State of Vermont to be added to the general fund.

4.04 Prohibited Distributions

No part of the net earnings or properties of this corporation, on dissolution or otherwise, shall inure to the benefit of, or be distributable to, its members, directors, officers or other private person or individual, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article III, Section 3.01.

4.05 Restricted Activities

No substantial part of the corporation's activities shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene (including the publishing or distribution of statements) in any political campaign on behalf of or in opposition to any candidate for public office.

4.06 Prohibited Activities

Notwithstanding any other provision of these Articles, the corporation shall not carry on any activities not permitted to be carried on (I) by a corporation exempt from federal income tax as an organization described by Section 501(c)3 of the Internal Revenue Code, or the corresponding sections of any future federal tax code, or (II) by a corporation, contributions to which are deductible under Section 170(c)2 of the Internal Revenue Code, or the corresponding sections of any future federal tax code.

ARTICLE V: BOARD OF DIRECTORS

5.01 Governance

OPEN Acupuncture Project™ shall be governed by its board of directors.

5.02 Initial Directors

The initial directors of the corporation shall be Jamie Long, Travis Beto, Catherine Clark Esq.

ARTICLE VI: MEMBERSHIP

6.01 Membership

OPEN Acupuncture Project™ shall have no members. The management of the affairs of the corporation shall be vested in a board of directors, as defined in the corporation's bylaws.

ARTICLE VII: AMENDMENTS

7.01 Amendments

Any amendment to the Articles of Incorporation may be adopted by approval of two-thirds (2/3) of the board of directors.

ARTICLE VIII: ADDRESSES OF THE CORPORATION

8.01 Corporate Address

The address of the corporation is:

OPEN Acupuncture Project Inc.
192 College Street
Burlington, VT 05401

The mailing address of the corporation is the same as the corporate address.

ARTICLE IX: APPOINTMENT OF REGISTERED AGENT

9.01 Registered Agent

The registered agent of the corporation shall be:

Jamie Long
33-A Montello Ave
Hood River, OR 97031

ARTICLE X: INCORPORATOR

The incorporator of the corporation is as follow:

Jamie Long
33-A Montello Ave
Hood River, OR 97031

CERTIFICATE OF ADOPTION OF ARTICLES OF INCORPORATION

We, the undersigned, do hereby certify that the above stated Articles of Incorporation of OPEN Acupuncture Project™ were approved by the board of directors on February 1st, 2020 and constitute a complete copy of Articles of Incorporation of the OPEN Acupuncture Project™.

Jamie Long
33-A Montello Ave
Hood River, OR 97031

Signature _____

Date _____

Travis Beto
65 S Main ST #2
Waterbury, VT 05676

Signature _____

Date _____

Catherine Clark
192 College St
Burlington, VT 05401

Signature _____

Date _____

**ACKNOWLEDGMENT OF CONSENT
TO APPOINTMENT AS REGISTERED AGENT**

I, Jamie Long, agree to be the registered agent for OPEN Acupuncture Project™ as appointed herein.

Signed: _____ Jamie Long, Registered Agent

Date: _____

BYLAWS of OPEN ACUPUNCTURE PROJECT INC.™

SECTION 1. PURPOSES AND OBJECTIVES

1.1 Primary Purposes and Objectives. The Vermont non-profit corporation, which may operate under the trade name “Open Acupuncture Project™”, is organized exclusively for charitable, education, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)3 of the Internal Revenue Code, or the corresponding section of any federal tax code, including, more specifically:

- a. To improve the quality of life in our community by providing relief from pain, discomfort, stress, isolation, and financial burdens of acute and chronic illness;
- b. To serve all individuals, regardless of sex, race, color, income, national origin, age, ability or disability, marital status, gender, financial situation, religion, size and shape, sexual orientation, or political beliefs;
- c. To provide affordable community acupuncture services, in compliance with the People’s Organization for Community Acupuncture cooperative guidelines;
- d. To provide affordable herbal medicine and services;
- e. To provide support, advice, and mentoring to individuals wishing to open a new or improve an existing community acupuncture practice;

And, anything reasonable in furtherance of the foregoing.

SECTION 2. DIRECTORS

2.1 Powers. All corporate powers of this nonprofit corporation shall be exercised by or under the authority of, and the affairs of the corporation managed under the direction of the board of directors.

2.2 Qualifications. All directors must be individuals who are 18 years of age or older. Directors need not be residents or citizens of Vermont or of the United States of America. The Directors must effectively represent the needs of the institution’s communities of interest. At least one director must represent patients and one director must represent the employees of OPEN Acupuncture Project™.

2.3 Number. The board of directors shall consist of not fewer than 3 persons nor more than 5 persons. The number of directors may be fixed or changed periodically, within the minimum and the maximum.

2.4 Elections and Tenure of Office. The Board of Directors at each annual meeting shall elect directors. The Term of each director shall be one year. Directors may be reelected for any number of consecutive terms. Despite the expiration of a director’s term, the director shall continue to serve until the director’s successor is elected and qualifies, or until there is a decrease in the number of directors.

2.5 Vacancies. A vacancy in the board of directors shall exist on death, resignation, or removal of any director. The board of directors at any meeting may fill a vacancy in the board of directors. Each director so elected shall hold office for the balance of the unexpired term of his or her predecessor. If the board of directors accepts the resignation of a director tendered to take effect at a future time, a successor may be elected to take office when the resignation becomes effective.

2.6 Resignation. A director may resign at any time by delivering written notice to the president or secretary. A resignation is effective immediately unless the notice specifies a later effective date. Once delivered, a notice of resignation is irrevocable unless the board of directors permits revocation.

2.7 Removal. A director may be removed at any time, without cause, by a two-thirds vote of the Board of Directors.

2.8 Meetings. An annual meeting of the Board of Directors shall be held in April. If the board of directors regularly schedules the time and place of any other directors' meetings, the meeting is designated as a regular meeting. All other meetings are designated special meetings. The board of directors may hold annual, regular, or special meetings in Vermont.

2.9 Telephonic Participation. The board of directors may permit any or all of the directors to participate in a regular, special, or annual meeting, or to conduct the meeting, by using any means of communicating by which all the directors participating in a meeting by this means are deemed to be present in person at the meeting.

2.10 Action Without Meeting by Unanimous Written Consent. Any action required or permitted to be taken at a board of directors' meeting may be taken without a meeting if all members of the Board of Directors take the action. The action shall be evidenced by one or more written consents describing the action taken, signed by each director, and included in the minutes or filed with the corporate records reflecting the action taken. Actions taken under this section are effective when the last director signs the consent, unless the consent specifies an earlier or later effective date. Consent under this section has the effect of a vote taken at a meeting and may be described as such in any document.

2.11 Call and Notice of Meetings. The annual meetings and regular meetings of the Board of Directors may be held without any notice of the date, time, place, or purpose of the meeting. Special meetings of the board of directors must be preceded by at least 10 days notice, if given by first class mail, or 48 hours notice, if delivered personally or given by telephone, email, or fax, to each director of the date, time, and place of the meeting. Except as specifically provided in these bylaws or applicable law, any notice need not describe the purpose of any meeting. The president or any 2 of the directors then in office may call and give notice of a meeting of the board.

2.12 Waiver of Notice. A director may at any time waive any notice requested by these bylaws. Except as provided in the following sentence, any waiver must be in writing, must be signed by

the director entitled to the notice, must specify the meeting for which the notice is waived, and must be filled with the minutes or the corporate records. A director's attendance at or participation in a meeting waives any required notice to the director of the meeting unless the director, at the beginning of the meeting, or promptly on the director's arrival, objects to holding the meeting or transacting business at the meeting and does not therefor vote for or assent to any action at the meeting.

2.13 Quorum and Voting. A quorum of the board of directors shall consist of a majority of the number of directors in the office **immediately** before the meeting begins. If a quorum is present when the vote is taken, the affirmative vote of a majority of the directors present when the action is taken is the act of the board of directors except to the extent that the articles of incorporation, these bylaws, or applicable law requires the vote of a greater number of directors. A director is considered present regardless of whether the director votes or abstains from voting.

2.14 Presumption of Assent. A director who is present at a meeting of the board of directors when corporate action is taken is deemed to have assented to the action taken unless:

- a. At the beginning of the meeting or promptly on the director's arrival, the director objects to holding the meeting or transacting the business at the meeting;
- b. The Director's dissent or abstention from the action taken is entered in the minutes of the meeting; or
- c. The director delivers written notice of the dissent or abstention to the presiding officer of the meeting before its adjournment or to the corporation immediately after adjournment of the meeting. The right of dissent or abstention is not available to a director who votes in favor of the action taken.

2.15 Compensation. Directors may be reimbursed for any expenses that are determined by resolution of the board of directors to be just and reasonable. Directors shall not otherwise be compensated for service in their capacity as directors.

2.16 Director Conflict of Interest.

2.16.1 A conflict-of-interest transaction is a transaction with the corporation in which a director of the corporation has a direct or indirect conflict of interest.

2.16.2 For purposes of section 2.17, a director of the corporation has an indirect interest in the transaction if (a) another entity in which the director has a material interest or in which the director is a general partner or shareholder is a party to the transaction or (b) another entity of which the director is a director, shareholder, officer, or trustee is a party to the transaction, and the transaction is or should be considered by the board of directors of the corporation.

2.16.3 A conflict of interest transaction is neither avoidable nor the basis for imposing liability on the director if the transaction is fair to the corporation when it was entered into or is approved as provided in Section 2.16.4.

2.16.4 A transaction in which a director has a conflict of interest may be approved either (a) in advance by the vote of the board of directors or a committee of the board of directors if the material facts of the transaction and the director's interest are disclosed or known to the board of directors or a committee of the board of directors or (b) by obtaining approval of (i) the Vermont Attorney General or (ii) a Vermont circuit court in an action in which the Attorney General is joined as a party.

2.16.5 For purposes of clause (a) section 2.16.4, a conflict of interest transaction is authorized, approved, or ratified if it receives the affirmative vote of a majority of the directors on the board of directors or on a committee designated by the Board of Directors, who have no direct or indirect interest in the transaction. A transaction may not be authorized, approved, or ratified under this section by a single director. If a majority of the directors who have no direct or indirect interest in the transaction vote to authorize, approve, or ratify the transaction, a quorum is present for the purpose of taking action under this section. The presence of, or a vote cast by, a director with an indirect interest in the transaction does not affect the validity of any action taken under clause (a) of Section 2.16.4 if the transaction is otherwise approved as provided in Section 2.16.4.

2.16.6 For purposes of clause (a) of Section 2.16.4, a conflict of interest transaction is authorized, approved, or ratified by the members if it receives a majority of the votes entitled to be counted under this section. Votes cast by or voted under the control of a director who has a direct or indirect interest in the transaction, and votes cast by or voted under the control of an entity described in section 2.16.2 may be counted in a vote of members to determine whether to authorize, approve, or ratify a conflict-of-interest transaction under clause (b) of Section 2.16.4. A majority of the members, whether present or not, who are entitled to be counted in a vote on the transaction under this section constitutes a quorum for the purpose of taking action under this section.

2.16.7 In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all the material facts to the directors considering the proposed transaction or arrangement.

2.17 Code of Ethics. The board of directors will adopt a Code of Ethics, which includes provisions for addressing conflicts of interest. The Code of Ethics will control so long as it is consistent with or more restrictive than Section 2.16 and its sub-sections.

SECTION 3. OFFICERS

3.1 Designations; Appointment. The officers of the corporation shall be the president, the secretary, the treasurer, and any other officer that the board of directors may from time to time appoint. The officers shall be appointed by, and hold office at the pleasure of the board of directors. The same person may simultaneously hold more than one office, except for offices of president and secretary.

3.2 Compensation and Terms of Office.

3.2.1 The compensation, if any, and the terms of office of each officer of the corporation shall be fixed by the board of directors.

3.2.2 Any officer may be removed, with or without cause, at any time by action of the board of directors.

3.2.3 An officer may resign at any time by delivering a notice to the board of directors, the president, or the secretary. A resignation is effective immediately unless the notice specifies a later effective date. If a resignation is made effective at a later date and the corporation accepts the later effective date, the board of directors may fill the pending vacancy before the effective date if the board of directors provides that the successor does not take office until the effective date. Once delivered, a notice of resignation is irrevocable unless the board of directors permits revocation.

3.2.4 No removal or resignation as provided in Section 3.2.2 or 3.2.3 shall prejudice the rights of any party under contract of employment.

3.3 President. The president shall preside at meetings of the board of directors, shall assume that the board of directors is advised on all significant matters of the corporation's business, shall act as principle spokesperson and representative of the corporation, and shall have other powers and duties that may be prescribed by the board of directors and these bylaws.

3.4 Secretary. The secretary shall have responsibility for preparing minutes of meetings of the board of directors and for authenticating records of the corporation. The secretary shall keep or cause to be kept, at the principle office of such other places the board of directors may order, a book of minutes of all meetings of directors. If the corporation has a seal, the secretary shall keep the seal in safe custody. The secretary also shall have other powers and preform other duties that maybe prescribed by the board of directors of these bylaws.

3.5 Treasurer. The treasurer shall be the chief financial officer of the corporation and shall keep and maintain or cause be kept and maintained, adequate and correct books and records of accounts of the properties and business transactions of the corporation. The treasurer shall deposit, or cause be to deposited, all money and other valuables in the name and to the credit of the corporation with those depositories that may be designated by the board of directors, shall disburse or cause to be disbursed funds of the corporation as may be ordered by the board of directors, and shall have other powers and perform other duties that may be prescribed by the board of directors or these bylaws.

SECTION 4. NONDISCRIMINATION

The corporation shall not discriminate in providing services or hiring employees, or otherwise, on the basis of gender, race, creed, marital status, sexual orientation, religion, color age, or national origin.

SECTION 5. GENERAL PROVISIONS

5.1 Amendment of Bylaws.

5.1.1 The board of directors may amend or repeal these laws or adopt new bylaws by majority vote.

5.1.2 Whenever an amendment or a new bylaw is adopted, it shall be copied in the minute book with the original bylaws in the appropriate place. If any bylaw is repealed, the fact of repeal and the date in which the repeal occurred should be stated in the book and place.

5.2 Inspection of Books and Records. All books, records, and accounts of the corporation shall be open to inspection by the directors in the manner and to the extent required by law.

5.3 Checks, Drafts, etc. All checks, drafts, and other orders for payment of money, notes, or other evidences of indebtedness issued in the name of or payable to the corporation shall be signed or endorsed by the person or persons and in the manner that shall be determined from time to time by resolution of the board of directors.

5.4 Deposits. All funds of the corporation not otherwise employed shall be deposited to the credit of the corporation in those banks, trust companies, or other depositories as the board of directors or officers of the corporation designated by the board of directors select, or be invested as authorized by the board of directors.

5.5 Loans and Guarantees. The corporation shall not borrow money and no evidence of indebtedness shall be issued in its name unless authorized by the board of directors. This authority may be general or confined to specific instances. The corporation shall not make a loan, guarantee an obligation, or modify a pre-existing loan or guarantee to or for the benefit of a director or officer of the corporation or any other person.

5.6 Execution of Documents. The board of directors may, except as otherwise provided by these bylaws, authorize any officer or agent to enter into any contract or execute any instrument in the name of and on behalf of the corporation. This authority may be general or confined to specific instances. Unless authorized by the board of directors, no officer, agent, or employee shall have any power or authority to bind the corporation by any contract or engagement, or to pledge its credit, or to render it liable for any purpose or for any amount.

5.7 Insurance. The corporation may purchase and maintain insurance on behalf of an individual against liability asserted against or incurred by the individual who is or was a director, officer, employee, or agent of the corporation, or TMis or was serving at the request of the corporation as a director, officer, partner, trustee, employee, or agent of another foreign or domestic business or nonprofit corporation, partnership, joint venture, trust, employee benefit plan, or other enterprise; however, the corporation may not purchase or maintain such insurance to indemnify any director, officer, or agent of the corporation in connection with any proceeding charging improper personal benefit to the director, officer, or agent in which the director, officer, or agent

was judged liable on the basis that personal benefit was improperly received by the director, officer, or agent.

5.8 Severability. A determination that any provision of these bylaws is for any reason inapplicable, invalid, illegal, or otherwise ineffective shall not affect or invalidate any other provision of the bylaws.

We, the undersigned, are all of the persons acting as the initial directors of OPEN Acupuncture Project™, a Vermont nonprofit corporation, and, pursuant to the authority granted to the directors by these bylaws to take action by unanimous written consent without a meeting, consent to, and hereby do, adopt the foregoing bylaws as the bylaws of this corporation.

Dated: February 1st, 2020

Dated: _____

Signed: _____
Jamie Long, Director + President

Dated: _____

Signed: _____
Travis Beto, Secretary

Dated: _____

Signed: _____
Catherine Clark, Director + Treasurer

Certificate

This is to certify that the foregoing is a true and correct copy of the bylaws of the corporation named in the title thereto and that the board of directors of said corporation duly adopted such bylaws on the date set forth below.

Dated: _____

Signed: _____

Travis Beto, Secretary

Narrative description

1023 Part IV --- Narrative Description of Your Activities

1. Our Mission and Purposes

The mission of OPEN Acupuncture Project Inc.TM is to provide affordable, accessible, and easy-to-use healthcare options for everyone in our community through acupuncture and herbal medicine. Our purpose is to improve the quality of life for our patients and their families by providing substantial support for their health, including relief of pain; reduction in the frequency, duration, and intensity of distressing symptoms; and prevention of the onset of acute and chronic diseases.

We provide services to all individuals, regardless of gender, sex, race, color, income, national origin, age, ability or disability, marital status, familial situation, religion, size and shape, sexual orientation, or political beliefs. Our patients' access to and level of care are never based on any of these factors. We actively promote our services to patient populations who have unmet healthcare needs.

OPEN Acupuncture ProjectTM will provide acupuncture and herbal medicine to the public at a facility in Lamoille County in Vermont. We will have a space that is large enough to accommodate up to 12 or more patients simultaneously. We are a Community Acupuncture clinic, as defined by the People's Organization of Community Acupuncture (POCA), a national professional cooperative organization that promotes affordable, accessible acupuncture. This means we abide by stringent POCA guidelines for maximizing public access to our services, and therefore qualify for inclusion in the national database of Community Acupuncture clinics. There are currently more than 20 community acupuncture clinics with 501(c)3 status.

The clinic provides neither emergency medical care nor primary care. Referrals to emergency care resources and primary care physicians are made as necessary and as timely as possible.

2. How is Our Organization Charitable?

OPEN Acupuncture ProjectTM allows people of all income levels to access the powerful therapeutic, preventative, and palliative benefits of acupuncture and herbal medicine. We benefit the public by providing extremely low-cost health care services for people from all walks of life, at all income levels. According to some surveys, the average cost for a single acupuncture treatment in the US can be \$75 for a single treatment. Our patients, however, pay between \$15 and \$30 for a single treatment. We also discount prices for marketing purposes and for patients who cannot afford our normal fees.

We believe that regular access to this type of care can reduce incidence of chronic diseases, can relieve chronic pain, and can resolve symptoms of illnesses when they do arise. The World Health Organization recognizes 91 distinct diseases for which acupuncture has been shown to be effective. Unfortunately, even with the advent of the Affordable Care Act, many people are not able to receive the health care they need. In Vermont, about 4.6% of the population still does not

have health insurance. About 19% of the population of Vermont is on Medicare, and another 22% on Medicaid. These plans do not currently cover acupuncture in the State of Vermont. For the few plans that do cover acupuncture, there is typically a copayment of \$30-\$40, and that is only after the deductible or out-of-pocket maximum is met.

The structure at the local, state, and federal levels leaves many people with no access to the simple, effective, and safe benefits of acupuncture. It leaves many treatable conditions unaddressed until they escalate into fully advanced diseases that are very expensive to care for. Even for those who have insurance coverage, the cost of the co-pay and high deductibles are prohibitive for people of normal incomes to receive consistent treatment. An effective course of acupuncture may consist of just a single treatment for an acute condition, or as many as two or three treatments a week on an ongoing basis for severely ill patients. By providing acupuncture at an affordable rate, which is less than the co-pay and generally one-third the cost of private-room acupuncture, OPEN Acupuncture Project™ address a serious gap in the healthcare services available to members of our community from private and government sources.

Our services are available for \$15-\$30, and we will reduce the rate if a patient cannot afford our normal fees by offering the patient a Reduced Fee Form. When using the Reduced Fee Form, the patient chooses how much they can afford per treatment (on a sliding scale of \$5-\$15), and that amount will be used in 3-month increments for all treatments the patient receives in that time frame. When the 3 months are up, the office manager or practitioner will revisit the form with the patient. If the patient still cannot afford \$5-\$15 per treatment, they simply sign another Reduced Fee Form (following the same process as outlined above). If a patient cannot afford to pay at all, we will provide free care as charity care. We *do not* conduct any income or needs verification. We do this for several reasons:

- A. To maintain a streamlined and efficient administration process, which in turn allows us to treat a high volume of patients for a low cost;
- B. To respect our patients' financial privacy;
- C. To express our trust in our patients;
- D. To acknowledge that individual circumstances may vary, and when a patient cannot afford our normal fee of \$15-\$30 per treatment, offer a reduced rate.

3. Our Present Activities

- A. To provide acupuncture treatments to patients from our community.
 - a. We anticipate this to be our primary activity and comprise most of our net income and expenditure.
 - b. This activity is entirely funded by treatment fees paid by patients.

- c. OPEN Acupuncture Project™ will open in 2020, and charge \$15-\$30 per treatment. A reduced rate will be available for patients that cannot afford the sliding scale fees.
- d. OPEN Acupuncture Project™ will host occasional open houses, where we will offer free acupuncture treatments to anyone, existing or new patients, on a walk-in basis all day.
 - i. The goals of open houses are as follows: to provide free, semi-regular treatments to people that cannot normally afford our services; to offer free acupuncture treatments as a marketing tool – as opposed to spending money on traditional advertising, which allows us to reinvest revenue directly back into the clinic and the community, and saves money for our patients.
 - ii. OPEN Acupuncture Project™ will also open its doors during special community events as both outreach and marketing endeavor.
- e. NCCAOM-certified, Vermont-licensed acupuncturists administer all acupuncture.
- f. For the first year of opening, we will start with truncated hours until we grow. The goal is to maintain operating hours of 9am-2pm on Monday, Wednesday and Friday; and 2pm-7pm on Tuesday and Thursday.

B. Provide Chinese and Western herbal medicine advice about products to patients from our community.

- a. Though essential to our mission, herbal medicine is a secondary activity to acupuncture; we will anticipate it will comprise of less than 5% of our time and less than 5% of our net income.
- b. We will use encapsulated herbs, which will be marked up slightly only to cover the time it takes to prescribe the correct formula and to cover shipping costs.
- c. Herbal services may be offered in conjunction with acupuncture, during the same hours, and by the same practitioners, and to the same patients as acupuncture services. There is no additional cost for an herbal consult (it is included in the \$15-\$30 fee for acupuncture).

C. Conduct administrative duties required to ensure financial solvency, efficient management and regulatory compliance of the clinic. This includes promoting our services and raising public awareness of the clinic.

- a. This activity comprises 10% of our time and is funded by clinic revenues as a component of payroll, and is considered to be a part of overhead expenses.

- b. Paid staff conducts this activity. In the future, it will also be pursued by volunteer board members and by community volunteers.
- c. The clinic facility will include office space appropriate to accommodate this activity.
- d. The public will be made aware of the clinic's activities via a website, and we intend to post flyers for our clinic, as well as pursue print and electronic media opportunities, including both news coverage and occasional paid advertising.

D. Provide support and mentorship on a volunteer basis to other acupuncturists, patients, and community members who are interested in starting or improving a community acupuncture clinic. Pursue continuing education in acupuncture, Chinese herbal medicine, and clinic management skills.

- a. We anticipate this activity comprises less than 1% of our time and is funded by clinic revenues as a component of payroll, and is considered to be a part of overhead expenses.
- b. Paid staff will conduct this activity. In the future volunteer board members and community volunteers may also pursue it.
- c. Our goal is to help support other community acupuncture clinics, especially throughout Vermont.

4. Our Planned Activities

We plan to continue all activities as described above, with the goal of delivering more treatments to more people. The overall percentage of time allotted to each activity is expected to remain the same. Should we be recognized as an organization described in the Internal Revenue Service Code Section 501(c)3, we will be able to expand the total number of treatments given by hiring additional acupuncturists and expanding the hours of operation. We will also be able to provide a more robust, stable community resource that is not subject to the threat of intermittent or permanent closure inherent to small for-profit acupuncture clinics.

Patient fees are expected to completely fund the operation of the clinic, with no grants being anticipated at this time. Should additional funding sources such as grants or low-cost loans become available to expand our services to those who are not able to pay even at the \$15-\$30 level, we are open to developing programs that enhance our mission and expand our capacity to provide healthcare to these underserved populations. Appropriate donations will be accepted as offered, but no major solicitation efforts are anticipated at this time.

1023 Part V --- Compensation and Other Financial Arrangement With Your Officers, Directors, Trustees, Employees, and Independent Contractors

3a. For each of your officers, directors, listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked and duties.

Name: Jamie Long, LAc.

Education: Master's Certificate in Acupuncture (POCA Tech); BA in Art History with minor in Studio Art (University of Colorado)

Profession: Licensed Acupuncturist

Qualifications: Jamie is a state and nationally licensed acupuncturist. As a recent graduate of POCA Tech, Jamie is qualified in the practice of community acupuncture and trauma informed care. In her student internship, Jamie completed upwards of 650 treatments. Her mission has always been to create a practice model that provides affordable health care to underserved communities.

Average hours worked: 30-35 hours per week

Duties: Provide acupuncture services to patients; manage clinic operations; bookkeeping and administrative tasks; liaison between Board of Directors and vendors, contractors and employees; oversee marketing activities; President of the Board of Directors; projection planning; supervision employees and volunteers.

Name: Travis Beto, MAcOM, LAc.

Education: Masters in Oriental Medicine (Acupuncture And Massage College); Bachelor of Health Sciences (Acupuncture And Massage College).

Profession: Licensed Acupuncturist

Qualifications: Travis has been licensed and practiced community acupuncture in Florida, Minnesota, and Vermont. He is a respected acupuncturist in all three states, as well as a respected small business and clinic owner in the community. Travis has practiced as a community acupuncturist for 10 years, giving thousands of treatments. Travis brings a depth of knowledge regarding acupuncture and the nuances of treating the citizens of Vermont. Travis is inspired by community acupuncture because it speaks to his core values of social justice, sustainability, and the idea of putting people and community before profits.

Average hours worked: 8 hours per fiscal quarter

Duties: Secretary of the Board of Directors; administrative functions; record minutes of board meetings; community outreach; advocate for patients needs.

Name: Catherine Clark, Esq.

Education: Juris Doctor (Cleveland-Marshall College of Law); Bachelor of Arts (Miami University)

Profession: Founding Attorney of Clark, Werner & Flynn, P.C.

Qualifications: As a long-time attorney in the state of Vermont, and trained mediator, Catherine is familiar with the needs of Vermont citizens from varied socioeconomic backgrounds. Catherine brings the perspective of a small business owner who has interfaced with and served many at-risk populations. Catherine is inspired by the community focus of this project and is committed to spreading the message about community acupuncture as a local resource.

Average Hours Worked: 8 hours per fiscal quarter.

Duties: Treasurer and on the Board of Directors; administrative duties; compensation and budget review; growth planning; advocate for patient needs.

5a. **Conflict of Interest Policy:** See attached bylaws for conflict of interest policy, Section 2.16 and acknowledgement of receipt of conflict of interest policy below.

1023 Part VI --- Your Members and Other Individuals and Organizations That Receive Benefits From You

1a. We provide acupuncture services to individuals as our primary activity. Please see Part IV for a full description of our activities.

1b. We provide acupuncture services to our employees, volunteers and directors at no cost, as a benefit of employment or service. These individuals should not comprise more than 1% of the population we serve. We are launching with 3 directors and 2 employees.

3. Family members may receive acupuncture services in the normal course of our business and at the normal rates.

1023 Part X --- Public Charity Status

6b (i) NONE

6b (ii) NONE

Acknowledgement of Receipt of Conflict of Interest Policy

I, Jamie Long, President of OPEN Acupuncture Project™, hereby acknowledge that I have received my personal copy of the Conflict of Interest Policy of OPEN Acupuncture Project™. I have read, understood, and agree to comply with the policy.

I understand that OPEN Acupuncture Project™ is charitable, and in order to maintain its federal tax-exempt status it must engage primarily in activities that accomplish one or more of its tax-exempt purposes. If I am aware of any information that may result in noncompliance of the Conflict of Interest Policy, I shall immediately notify the designated officer of the governing board.

Signature _____

Date _____

I, Travis Beto, Secretary of OPEN Acupuncture Project™, hereby acknowledge that I have received my personal copy of the Conflict of Interest Policy of OPEN Acupuncture Project™. I have read, understood, and agree to comply with the policy.

I understand that OPEN Acupuncture Project™ is charitable, and in order to maintain its federal tax-exempt status it must engage primarily in activities that accomplish one or more of its tax-exempt purposes. If I am aware of any information that may result in noncompliance of the Conflict of Interest Policy, I shall immediately notify the designated officer of the governing board.

Signature _____

Date _____

I, Catherine Clark, Treasurer of OPEN Acupuncture Project™, hereby acknowledge that I have received my personal copy of the Conflict of Interest Policy of OPEN Acupuncture Project™. I have read, understood, and agree to comply with the policy.

I understand that OPEN Acupuncture Project™ is charitable, and in order to maintain its federal tax-exempt status it must engage primarily in activities that accomplish one or more of its tax-exempt purposes. If I am aware of any information that may result in noncompliance of the Conflict of Interest Policy, I shall immediately notify the designated officer of the governing board.

Signature _____

Date _____

Sample General Circle Meeting Agenda and Minutes

08/08/2020

attending: Lisa A., Lisa R., Rachel, Sonya, Cortney, John, Moses

meeting minutes: Moses

circle reports:

Cully clinic (Sonya) - front desk clunky and weird off and on, but mixed with patients feeling good about our new check in process overall. Work flow seems good. Having enough laundry sheets super helpful. Some people still expecting (old school WCA patients)/asking for blankets. Mostlt they are being trained to bring their own blankets gradually.

Hillsdale clinic (Rachel) - good overall. Sheets huge difference. Not enforcing bring own blanket as much. Looking forward to more reception as available. Air filtration.

Rockwood clinic (Moses) - reception/ ledgers/ laundry all very hard at first and gradually smoothing out. It's satisfying to notice patients learning the self-check in process

Finance circle (Cortney) - check in about current savings; checking around 30K (PPP funds). Watching saving and checking very carefully to identify what are the loan funds and what are actual income. Earned about 51K in July. We are offering a little over half of our punking shifts overall, between all clinics. Overall money if looking more positive.

Reception ledgers process: updated way of handling ledgers each week. Three steps:
1) staple end of day square report to that days' POCApoint ledger (laid out flat);
2) staple bank deposit slip to the weekly ledger summary page (laid out flat).
3) bring HRP care oregon vouchers to Cully and put in manilla folder by HR office (these no longer go in the ledgers). FYI, Care Oregon still reimburses WCA \$10.00/CO-voucher. Yay!

BOD circle - leadership conversation starts soon. Meeting coming up Friday, August 21st, at 7pm @ Cully

WCA intern clinic for protestors – Ten or so patients so far. Feeling good to help people that have been injured in some way by the various forms of state violence. Great way for students to learn about all kinds of issues around managing a clinic and communicating/managing expectations of what the pop-up intern clinic can offer. Noticing the feeling/tone of the experience so far is in the right place. Identification note for patient in this clinic: WCA is not asking for ID, so if patients are using names that seem unusual, we just go with it (regarding managing surveillance issues for protestors).

Proposals:

1) Finance circle Proposes removing the job of ledger calculating person. No one seems to want to do it and its a third confirmation check of the same ledger information from reception and clinic managers each week. It's a possible area of redundancy we can remove with little issue and it saves both energy and money.

2) update WCA vacation policy

Action steps: create a smaller work group to hammer out a new plan and revisit the plan later.

Vacation committee: Skip, Cera Mae, John

3) WCA Almanac project

– something to go to, sort of a current updated in real time all tasks for all admin workers digital manual. Basically, each WCA worker answers “what are the main action steps involved in the tasks you handle in your job?” It can help us notice trends of work flow at certain times of the year. For example, becoming aware of when are better times to take certain actions. Having reminders of what tasks ar involved in each month tor quarters tasks. Consider starting this in about six months, when more management/admin processes have been. Consider how to develop/stage creating this almanac. Especially helpful for handing off projects/admin tasks that are currently in flux. It takes time up front, but the time savings down the line will be way worth it. Also a record of what work we have done, that we can reflect on to celebrate the learning. Consent to go forward with this. Yay!

4) Choosing WCA's version of sociocracy meeting approach

Propose that at least during COVID-19 response, we use a very basic sociocracy meeting structure. Have check ins from clinic circles, from finance circle, from BOD circle as a baseline and then specific agenda items. 3 months of this type of schedule. So, through November, 2020 (temporary timeline as a starting point).

5) more of an in-process long term burnout prevention/worker support approach:

Modeling speaking up for our own needs/communicating our workload needs. The ideas here is to suggest when we are doing tasks that may possibly be under another admin job category and likely delegate said task to a WCA worker in that job category. This is a overall way forward to both share responsibilities and to clearly share when we are managing as much as we can right now and cannot actually take on a new task (even if it fits our job category). This isn't at all about “sucking it up and making it work”.

Sometimes the answer will have to be “no” when people ask to delegate certain tasks. Its important to be transparent about your workload, regarding accepting or not accepting more tasks at any given time.

Safety meeting as part of GC today – confirmation of its OK for patients who would usually bring service dogs to still bring them into the clinic and on treatment chairs during COVID-19 times. Dogs are not a vector for the COVID-19 virus. Humans can give it to dogs but not the other way around.

GC meeting Summary: WCA's GC motto could be: “What needs to stop, start, continue (what we already offer to our community through CA service) or change”. We are developing our own version of a “good enough bureaucracy” to enact our mission of service.

Next GC meeting: Sept 12th at 6pm at Cully