



**CVNL**

Center for Volunteer & Nonprofit Leadership

**CHANGE STARTS HERE**



# PIVOT, TURN, & LEAD

## Capacity building in times of uncertainty and opportunity

July 12, 2022

**Linda Jacobs**  
Chief Executive Officer  
[ljacobs@cvnl.org](mailto:ljacobs@cvnl.org)

**Tom Hayashi**  
Chief Capacity Building Officer  
[thayashi@cvnl.org](mailto:thayashi@cvnl.org)



© 2022. Not to be distributed or reproduced without the express permission of Center for Volunteer & Nonprofit Leadership.



**Linda Jacobs, Chief Executive Officer**, has served as the Chief Executive Officer of Center for Volunteer & Nonprofit Leadership (CVNL) since 2002. CVNL advances nonprofits and volunteerism by strengthening leadership, encouraging innovation, and empowering individuals in the communities they serve. CVNL knows that passion alone isn't enough when it comes to creating strong nonprofits. The CVNL team works with aspiring and established leaders every day to help them build the skills and connections that can take their impact to the next level. Linda has grown the organization in size and scope with services and programs now available throughout the Bay Area with offices in Solano, Sonoma, Napa, and Marin Counties.

With over 40 years of combined executive and nonprofit management experience, Linda, a self-proclaimed 'governance nerd', frequently presents on issues and trends in the nonprofit sector and consults with nonprofit leaders on board fundamentals, structure, assessment, and development. She enjoys talking with her colleagues, comparing notes on what is working and how to meet challenges head-on. Linda graduated from the University of South Florida and is a graduate of the U.S. Chamber of Commerce Institute for Organization Management. She lives in Novato, California where she enjoys her vegetable garden, listening to music from the '70s, watching the Warriors and SF Giants, staying up to date on current issues, and hiking with her dog.





**Tom L. Hayashi, MS Ed, PhD, CMC<sup>®</sup>, Chief Capacity Building Officer**, brings 20 years of professional expertise in designing and facilitating people-centered learning experiences and leading organizations and initiatives to greater impact. With a background in education, and organizational development. Tom's professional highlights include serving as a chief fundraising executive for a variety of mission focused on the arts to social services with annual operating budget of \$3.5M to \$50M per year.

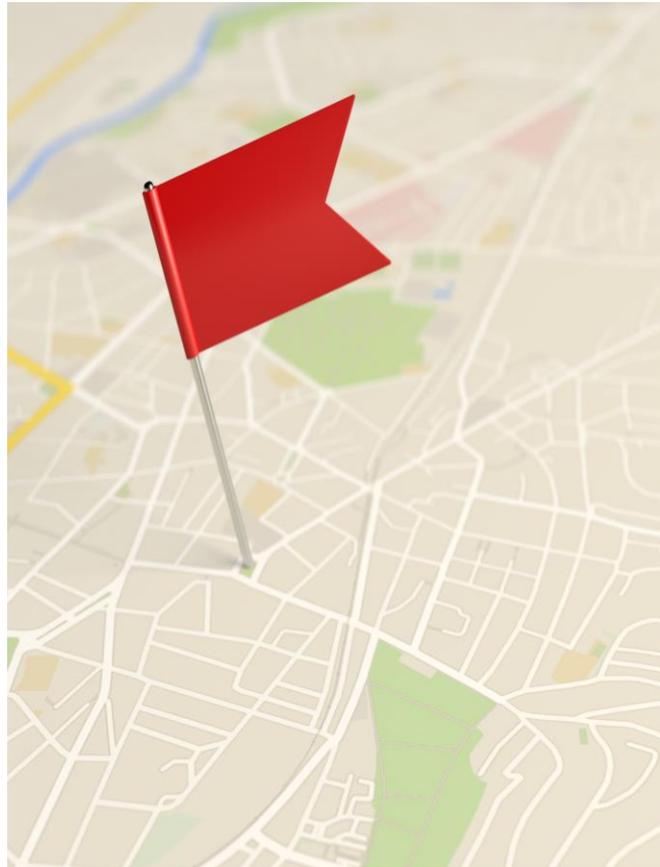
His past and present professional credentials include Certified Management Consultant (CMC) through the Institute of Management Consultants, Associate Certified Coach from the International Coaching Federation, Certified Master Coach from the Center for Coaching Certification, and Certified Fundraising Executive (CFRE) from CFRE International.

On a personal note, he continues his love affair with the outdoors, being a shameless foodie, and a dog dad to his 10-year-old Basenji-Chihuahua mix named Jhak. He is based in Oakland, California.



# Focus for today

- Reflect on the organizational experiences in the last two years, understand how organizations are not only coping, surviving, but also thriving.
- Learn from the collective experience as a sector in living through multiple crises.
- Organizational goals for making our organizations, teams, and communities more hopeful, stronger, better, and more resilient than ever before through strategic capacity building.



## **Part I. Group Reflection and Aspiration**

**Tom Hayashi, 15 min**

Icebreaker Paired Discussion & Large Group Sharing: Rose, Bud, and Thorn, 10 min

## **Part II. Pivot, Turn, & Lead**

**Linda Jacobs, 15 min**

- State of the Sector, Trends
- Q & A

## **Part III. Capacity Building Strategies**

**Tom Hayashi & Linda Jacobs, 15 min**

### Table Discussions

- Generating Capacity Building Ideas
- Organizational Planning

# Session Agreements

- Be open, listen, share and ask questions
- Listen with curiosity, speak from experience and connect with respect.
- Hold and respect confidentiality – be aware of boundaries around what leaves this space – take the learning, leave the details.
- Permission to learn - improving your knowledge is a process that is ongoing and takes practice and time; good governance requires understanding, flexibility, attention, preparation and commitment.



## **PIVOT**

**Basketball.** to keep one foot in place while holding the ball and moving the other foot one step in any direction.

To modify (a policy, opinion, product, etc.) while retaining some continuity with its previous version.



## **TURN**

To cause to move around or partly around, as for the purpose of opening, closing, or tightening. An act of changing or reversing position or posture, as by a rotary movement: a turn of the head.

## **LEAD**

To conduct by holding and guiding.  
The extent of such an advance position.

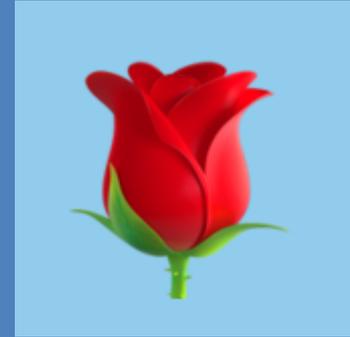
# Part I. Group Reflection and Aspiration

## Tom Hayashi



- Paired Discussion
- Large Group Sharing

3 min per person



## **Discussion Question:**

Thinking about your experience in the last two years at your organization and looking ahead...

**What is your rose, bud, and thorn?**

| Paired  
Breakout  
6 min

## Part II. Pivot, Turn, & Lead

### Linda Jacobs



- Past and Recent Trends
- Good to Best Practices
- Q & A

# The Great Resignation

Top reasons cited for leaving:

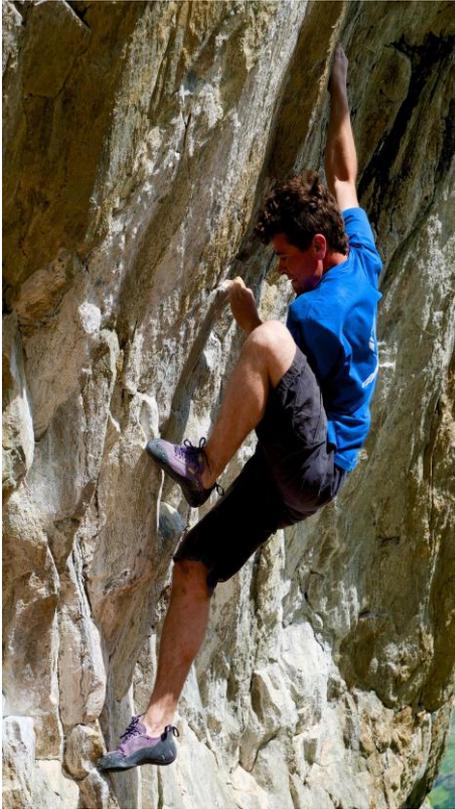
- 63% low pay
- 63% no opportunity for advancement,
- 57% feeling disrespected at work

Reasons workers want to work remotely:

- 79% afraid of getting sick
- 79% avoid the commute
- 74% reduce stress
- 72% better work-life balance
- 70% better focus



# Challenges/Trends (since 2021)



1. Workforce: recruitment, retention, diversity, developing new leadership, remote work, hybrid
2. COVID: protocols, policies and vaccine mandates and accommodations
3. Virtual fundraising and revenue development
4. Diversity, Equity, Inclusion: where to start, how to implement, board/staff buy-in
5. Board governance: recruitment, diversity, engagement
6. Technology: access, cybersecurity
7. Volunteer activities, recruitment and retention
8. Shifting demographics
9. Role in advocacy

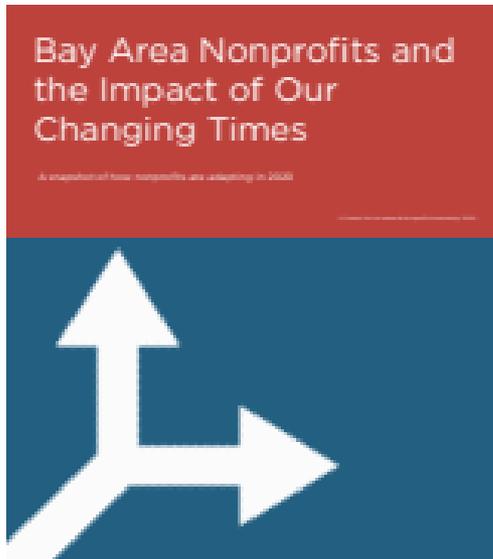
**CVNL**

# Bay Area Nonprofits and the Impact of Our Changing Times Survey (CVNL, 2020)



Despite challenges, there has been growth & opportunities:

- Embracing new technology
- Providing new services and programs
- Finding new ways to deliver work
- Collaborating more with others
- Developing new systems, processes, strategies
- Opportunity to create, question, care for staff who make the work possible



[https://cvnl.org/wp-content/uploads/2020/12/CVNL-NP-Survey-Report\\_FINAL-11.23.20.pdf](https://cvnl.org/wp-content/uploads/2020/12/CVNL-NP-Survey-Report_FINAL-11.23.20.pdf)

# Bay Area Nonprofits and the Impact of Our Changing Times Survey



## “What keeps you up at night?”

- Personnel issues
- Remote work issues
- Health of staff and people served
- Fund/resource development
- Programming and events – scenario planning, capacity
- Financial management - scenario planning/pivoting
- Business continuity (office space, disasters, succession planning)

# Recommendations

- ❑ Prioritize rigorously and collaboratively, decision making should be distributed and systemized, driven by data/metrics
- ❑ Invest in infrastructure, leadership, and culture of data analytics
- ❑ Employee wellness is mission critical, make this aspect of organizational capability a strategic priority—address burnout, flexible work schedules without compromising performance standards and accountability

# Q&A

**CVNL**

# Part III: Capacity Building Strategies

Linda Jacobs & Tom Hayashi, 15 min



## Table Discussions

- Generating Capacity Building Ideas
- Organizational Planning

# Paired Discussion Prompts

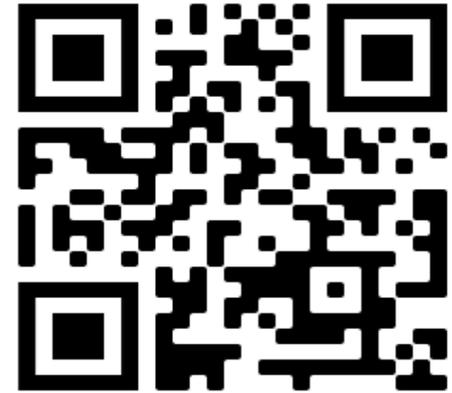
## What is your capacity building strategy for 2022-23?

- Board Leadership Development
- People Solutions: Staff & Volunteers
- Strategic Pivots, Turns, and Leadership
- Agile Program Development (Evaluation)
- Fundraising: Analysis, Strategies, and Goals
- Culture of Wellness
- Diversity, Equity, Inclusion, Belonging, Justice

# Capacity Building Resources at CVNL.org

The screenshot shows the CVNL.org website with a navigation bar at the top containing 'Home', 'About Us', 'Services', 'Contact Us', 'Donate', and 'Subscribe'. Below the navigation bar is a banner for the 'Fall 2022 Learning & Leadership Series' with the tagline 'ENGAGE. LEARN. LEAD & INSPIRE.' and a list of events: 'Excellence in Leadership (ELP), Sept. 13 - Nov. 15', 'Management Essentials Series, Sept. 29 - Oct. 27', and 'Leading For Equity and Inclusion, Nov. 3 - Dec 8'. Below the banner are four service categories: 'Executive Search', 'Consulting Services', 'Volunteer Services', and 'Learning & Leadership'. The 'UPCOMING ACTIVITIES' section lists two events: 'Finance & HR Managers Peer Learning Network: Compensation and Benefits' on Wednesday, July 27, 2022, 9:00 AM to 10:30 AM, and 'Fundraising & Marketing Managers Peer Learning Network: Search Engine Optimization' on Wednesday, July 27, 2022, 1:00 PM to 2:00 PM. The 'CVNL FEATURES' section includes a photo of a group of people and the text 'CVNL ON THE POWERS OF THE INDIVIDUAL IN AN EMPOWERED ORGANIZATION'.

- Strategic Planning
- Fundraising
- Operations Review
- Human Resource Management
- Executive Search
- Program Development & Evaluation
- Volunteer Management
- Board Development
- Wellness Programs
- Diversity, Inclusion, Equity Integration
- Customized Training



Contact us for a free 30 min consultation [thayashi@cvnl.org](mailto:thayashi@cvnl.org)

The background features a series of overlapping geometric shapes. On the left, there is a large green shape with a curved edge, partially overlapping an orange shape. To the right, a large red shape with a curved edge overlaps a dark red shape. A vertical blue strip is on the far right. The text "CHANGE STARTS HERE" is centered horizontally across the middle of the image.

CHANGE STARTS HERE