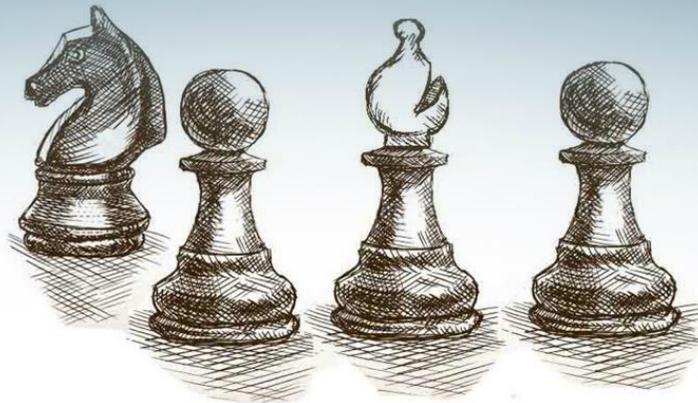


JASON LEWIS
CFRE & AFP MASTER TRAINER

THE
WAR
FOR
FUNDRAISING
TALENT

AND HOW SMALL SHOPS CAN WIN



Thank you for your interest in *The War for Fundraising Talent*. The thoughts and ideas in this book have been simmering in my head for several years and I am now diligently working with a writing assistant to ensure that we are ready for release in Spring 2018. I would certainly appreciate your feedback and suggestions as to how I might clarify and strengthen my message. I will be relying heavily on word-of-mouth to generate interest and enthusiasm for the content of this honest and thought-provoking book. I would appreciate your help by sharing this excerpt with friends and colleagues, following me on LinkedIn and Facebook, arranging invitations for me to speak to your local AFP chapter, and opportunities to speak at regional and national conferences.



Thank you,

Jason Lewis, CFRE & AFP Master Trainer

About the Author



Jason Lewis, CFRE & AFP Master Trainer, is the managing partner of BetterSchools LLC, an Austin-based firm partnering with private and independent schools throughout the United States. In addition to this role, Jason owns Lewis Fundraising, a company he founded and currently operates. Together with his team of fundraising professionals, Jason serves as fundraising counsel and professional solicitor for a growing network of non-profit organizations throughout the United States. Since graduating from Eastern University's non-profit management program in 2010, Jason has been recertified as a Certified Fundraising Executive (CFRE) and was recognized as a member of the Association of Fundraising Professionals' Master Trainers. Most recently, he graduated from the College of Executive Coaching. Jason is currently touring the United States presenting *The Contrarian's Guide to Effective Fundraising* to non-profit audiences.

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Chapter Four

Fifty years ago, fundraising was not a professional career path. For quite some time, those of us doing the hiring didn't understand how to characterize the ideal fundraiser, because there was no standard, no guideline, no best comparisons. The way to hire at the time was to try to match what we seemed to need with the resumes on our desks. For decades we believed a friendly, outgoing personality, combined with a passion for the cause, was all we needed for successful fundraising.

During this same half-century, psychologists and economists have given us a greater understanding of who we are as individuals. We now have a better idea of how we're wired—and how we can best contribute in the workplace. Today, we better understand the passion that might compel us, the motives that might persuade us in one direction or another, and what comes with us versus what stays when we change employers. Through the lens of one celebrated, but ill-fated fundraiser, we can understand how these characteristics about ourselves might affect our organizations' fundraising outcomes.

Harvard's Fundraiser

Scholar Neil Rudenstine was President of Harvard from 1991 to 2001. An Oxford Rhodes Scholar, he earned a BA from Princeton and a PhD from Harvard (in English literature). Rudenstine spent 20 years at Princeton as an English professor and administrator. Not, you'll agree, the typical route for someone who'd make fundraising history.

When Rudenstine began his tenure at Harvard, there was a \$42 million deficit—another \$5 million worse than the prior year. He needed to rectify this and build confidence in his leadership.

After planning for two whole years, Rudenstine launched the largest Ivy League capital campaign to date. It surpassed its goal by *half a billion dollars*. He grew the university's endowment so much it positioned Harvard as the world's second-largest nonprofit (behind only the Roman Catholic Church). However, this remarkable achievement came at a cost that overshadows his legacy as one of Harvard's greatest fundraisers.

While president there, Rudenstine created a "private time distribution formula" to keep his priorities straight. He would devote no less than half his time to the intellectual life of the institution—academic planning, faculty searches, tenured appointments—and no more than a third to fundraising. The rest of his time was to be dedicated to administrative duties.

"If I went through a week where I hardly had a chance to think about academic planning, then I would make a very powerful correction the next couple of weeks," Rudenstine explains.

You needn't be a friend of Rudenstine's, nor a nonprofit executive, to understand what happens when people tie themselves to this kind of system. Leaders like Rudenstine experience a sense of regret over being pulled away from the mission, and yet are

aware the mission obligates them to do so. The mission itself, then, becomes a double-edged sword that compels them to repeatedly carry out tasks they'd prefer not to perform.¹

Exhausted

In late 1994, Harvard officials announced that Rudenstine was suffering from “severe fatigue and exhaustion of unknown origin.” Disappearing for three months of rest and relaxation, Rudenstine found himself on the cover of *Newsweek*, above the headline “EXHAUSTED.”

The article noted, “After three years of intensive nonstop toil in a hypermetabolic climate, Rudenstine hit the wall. His life was devoured, his sleep habits scrambled, his waking minutes assaulted by a hail of never-finished tasks.” Medical tests, not surprisingly, indicated his exhaustion was a result of overwork and not enough sleep. Rudenstine’s condition was due in large part to the stress associated with the campaign—and his self-imposed time formula.

Rudenstine resigned in 2001, just as the university began considering another capital campaign. As he left, he expressed regret for not having had the flexibility to get to know the school better during his tenure. Despite his fundraising achievements, Rudenstine’s misadventure prompted *The New York Times* to comment, “[U]ndergraduates said they rarely saw him between a welcome handshake freshman year and commencement.”

Others criticized him for failing to take advantage of his platform as a steward of the nation’s oldest and most prestigious university. The president of *The Crimson*, the university newspaper, noted Mr. Rudenstine “was clearly a brilliant fund-raiser, but to most students, that’s all he was, Harvard’s fund-raiser.”

Rudenstine’s experience at Harvard resembles what psychologists refer to as an obsessive passion—a stubborn side of passion that insists on its own way and demands a disproportionate part of a person’s life. I note here that obsessiveness doesn’t necessarily get in the way of goals. However, if this is the primary passion driving people, once goals are achieved, they experience burnout.

Obsessive passion often demands that people force themselves into an identity that doesn’t align with who they are. As admirable as the financial outcomes were, Rudenstine’s identity was in harmony with that of: 1) a professor with his students; and 2) a renowned scholar of English literature and poetry—not that of a remarkable fundraiser. Rudenstine may have spent the first half of his career envious of a role he eventually took on only to discover it was nothing like he’d imagined.

His story reflects many fears nonprofit executives have about fundraising, beyond the fear of asking for money. Those who are determined to change the world don’t want to be known as “just fundraisers,” any more than they want to become the poster child for the overworked executive. They fear betraying the mission by prioritizing money over relationships. Or they fear losing control of the organization. When they assumed their

senior post, they never imagined that fundraising could define their own success or failure as a leader.

Fundraising's Identity Crisis

The fundraising profession continues to contend with an identity crisis it can't shake. There are many in the field today who have spent years, if not decades, struggling with their identity as fundraising professionals. They prefer other titles and miss the opportunity to convey the importance of their task, fearing that the essence of their job description might be exposed and misunderstood. Many fundraisers have become quite good at what they do, have achieved remarkable goals, and yet have relied on a forced, obsessive passion, rather than a passion that aligns with who they are.

Like Rudenstine, fundraisers who came up through the ranks organically may have spent years struggling, like square pegs trying to force themselves into round holes. These long-tenured fundraisers continue to tussle with feeling like institutional beggars, necessary evils, or the sector's awkward stepchildren. And, like Rudenstine, they may have accomplished their task with success, but their health and quality of life have suffered along the way.

The UnderDeveloped study noted, "[F]undraising is still fighting to be recognized as a profession, even though it has many of the characteristics generally associated with professional status (a body of knowledge, a professional association, education programs, and a code of ethics, among others). Leaders from across the sector—not just those focused primarily on fundraising—should join together to promote fundraising as an attractive and rewarding career and the development director role as integral to positive change in our communities."²

Fundraising is not the only profession to struggle with an identity crisis. In *The Lawyers Myth*, Walter Bennett describes one the legal profession has had for some time. While the historical (and favorable) mythology representing the lawyer was Abe Lincoln, today's lawyer is perceived to be a greedy, cynical manipulator of access and power. Bennett refers to this crisis as a self-inflicted wound "that will not heal until we begin to ask ourselves the essential mythmaking questions about who we are and whom we serve."³

As a clinical law professor at the University of North Carolina, Bennett saw that, while attending law school, many students lose the confidence and self-respect that accompanied their ideals when they began their studies. They arrived to pursue a social agenda with some notion of justice at its core. Consequently they discovered justice might not be the point; worse, it could hinder their success in the legal system!

We're all familiar with the characterization of a no-holds-barred, go-for-the-jugular trial lawyer—or an overbearing, relentless, and humorless office lawyer, one who measures success by demonstrating superiority, usually by winning. According to Bennett, these negative stereotypes are pervasive and deeply affect lawyers' professional psyche: "It has destroyed our professional mythology...our capacity to create professional myths

that allow us to grow and to understand ourselves and the social and moral significance of our profession.” It is exactly this type of disillusionment that I worry about in the nonprofit sector.

The Passion Predicament

I was recently speaking to young fundraising professionals about their career aspirations. As they introduced themselves, I was hoping someone would say her decision to be a fundraiser wasn't solely based on passion for a cause. No luck. One after another, each participant espoused a call of some sort to make a difference in a particular global or local condition.

Now, there's nothing wrong with this. But as a motivator, it won't lead to a long fundraising career. Researchers who study other professional paths have come to the same conclusions about the role passion plays—or does not play—in our careers.

Enticing “career” advice is tossed about regularly these days. “Follow your passion.” “Do what you love.” With empty promises like these, we've convinced ourselves and the generations behind us that pursuing the work you love is the path to career utopia.

Cal Newport, a professor at Georgetown University, developed what he calls a passion hypothesis explaining why turnover in the workplace is so high among young people today. He says the passion hypothesis has risen to the status of an absolute since Steve Job's commencement address at Stanford in 2005.

While Job's address encompassed everything from his adoption as a child to dropping out of college, and from founding multiple companies to his diagnosis with cancer, all people seemed to hear was “follow your passion.” They surmised that the key to occupational happiness was to figure out what you were passionate about—and then simply find a job that matches that passion.

What's evident if you read Job's commencement address is something else altogether. Just as Job did in actuality, we're more likely to *stumble* onto life passions rather than being able to *follow* them.⁴

Miya Tokumitsu, author of *Do What You Love: And Other Lies About Success and Happiness*, warns that “Do what you love”, synonymous with “follow your passion”, makes exploiting employees much easier, because they can be convinced what they're really doing is fulfilling a passion—rather than earning a wage. This way of thinking easily leads to the belief that work is *not what we do for compensation*, but something that is an act of love. While “do what you love” sounds harmless, it is ultimately inward-focused, to the point of narcissism, absolving us of any obligation to acknowledge or improve the world.⁵

Name Your Passion

But is passion only about doing what you love? Passion can fuel motivation, enhance well-being, and provide meaning in everyday life. However, passion can also arouse negative emotions; lead to inflexible persistence; and interfere with achieving a

balanced, successful life. So is passion only good or only bad? Let's continue looking at two kinds of passion, *harmonious* and *obsessive*, and see how they differ.

When we freely engage in an activity because it is important to us—not because we anticipate rewards (such as potential income)—we're embodying harmonious passion. There's no external pressure or obligation; we participate in the activity voluntarily. Harmonious passion can occupy a significant part of our identity, but *it doesn't create an imbalance in other areas of our lives*.

Obsessive passion, on the other hand, means we're responding to pressure to meet expectations beyond our control. It very quickly demands a disproportionate part of our identities and causes conflict with other meaningful areas of our lives. This kind of passion doesn't contribute to satisfaction with our work; instead, it raises the likelihood of burnout—or worse.

It's questionable whether the young professionals at the AFP gathering we talked about earlier were passionate about raising money, achieving their goals, or even building relationships with donors. They may be devoted to their nonprofit's mission. Even so, I suspect they may be relying on a forced passion to continue in their fundraising work. Harmonious passion is the kind that aligns itself with our identities and well-being without conflict. It's much more promising for staying the course. Let's face it, our sector has a passion predicament. To resolve this—and to ensure long-term employment and commitment—we must cultivate a harmonious passion for fundraising.

First, our sector needs to raise up a new generation of fundraising professionals who don't question the legitimacy of their roles. Neither should they dismiss the contribution they make within the nonprofit and for the greater good of society.

Second, nonprofits can't rely on the demand for talent and earning potential to compel young professionals into the field of fundraising. We need to make sure both existing and up-and-coming fundraising professionals learn to be inspired by more than simply their passion for the cause. Otherwise, it's unlikely we'll be able to shake our identity crisis, reduce turnover and reach the goals required to accomplish our mission.

I have found the most talented fundraising professionals develop a complementary passion oriented toward donors who have a passion for the cause. These individuals jump out of the bed in morning to interact with individuals who want to demonstrate, through their generous support, a commitment to effective change and a confidence in those who can carry it out. I sometimes refer to this as a dual orientation to the mission; fundraising professionals are oriented toward those whose relationship with the organization is to give rather than receive.

Implicit Motives vs. Explicit Goals

When deciding among a group of candidates, it's easy to be impressed with an applicant's track record, personality, and charm. We can also be fascinated with personality assessments that explain behavior and pinpoint motivations. From these we

try to predict how people might behave in certain situations or with colleagues, such as how effective they might be at developing new relationships or orchestrating the details of a campaign. One area of personality research, implicit motives, has gained prominence in recent decades but has yet to take hold in how we select fundraising candidates.

We can better understand ourselves and our people by clearly distinguishing between *implicit* motives and *explicit* goals. This distinction offers a more thoughtful response to the challenges we're facing in our maturing profession. Could it be that a misalignment between the fundraisers' explicit goals and implicit motives is to blame for the high turnover in many development offices?

I've developed a typology to improve our understanding of the underlying forces we encounter every day in professional fundraising. These three categories provide a framework for: 1) better informed hiring decisions; 2) more effective coaching; and 3) reduced turnover.

Let's start by defining implicit motives. These are preferences or tendencies toward an incentive, such as achievement, affiliation, or power; or to avoid threats, such as failure, rejection, or control by others. Most of us are unaware of the implicit motives that influence our behaviors, which are often best understood through others' observations.

Among fundraising professionals, organizations can observe implicit motives playing out through how we interact with donors, organize events, and participate in collaborative settings. They can note those of us who approach our tasks with strong determination and others who relish relationships as the centerpiece of nearly everything we do. Some of us hope our influence and reputation will afford us a sure path to greater achievements. When we're tired or lacking confidence, we tend to avoid situations where we might make a mistake. Or we'll hesitate for fear our requests will be denied—and then there's the possibility a major donor may have unreasonable expectations in exchange for a generous gift.

That one individual's implicit motives differ from another's isn't unexpected. What isn't always considered is the tension between these implicit motives and explicit goals. Explicit goals represent everything we might put on paper, communicate to others, and evaluate with our boss. Rarely do we confront the fact that an explicit goal—asking for money—may be at odds with an implicit motive—to avoid rejection.

In other words, we may want to achieve something for a certain internal purpose or reward, something that fulfills a need, rejuvenates us, or enhances our life. At the same time, we are tasked with certain goals and objectives for our employers. Our instincts and actions can operate independently of each other. If these aren't aligned—if they're out of sync—we run into situations like Rudenstine's. Alignment can mean we respond to stressors in ways that positively affect our health and well-being. Misalignment is just the opposite. Wired as a Renaissance literature professor, Rudenstine was expected to raise funds, something that didn't energize him nor suit his internal motivation. For him, it might have felt draining, frustrating and full of inner conflict.

Here's what I've observed. A misalignment between explicitly stated goals and implicit motives is the central factor to blame for high turnover among fundraising professionals. Warring motivations, such as the desire to be a fundraising professional but yet avoid rejection, can thwart even dedicated fundraisers. Our job as a sector is to gain understanding of this conflict so we can help professional fundraisers succeed, despite any unconscious ambivalence. I believe this will go far in reducing the turnover that impedes the progress of our nonprofits.

In my two decades of experience with fundraising professionals, I've encountered colleagues who tend to gravitate either toward, or away from, typical fundraising responsibilities. This influences how they plan, how they prioritize their time, and how they interact with donors. By understanding what drives them, we learn how their decisions can affect our fundraising culture. Despite their best intentions, fundraising professionals demonstrate patterns and habits that interfere with their effectiveness.

For example, I've always been quick to engage with major donors and solicit their support. However, if my goals included event planning and writing grants, I could always rationalize my time and attention toward those activities I was more comfortable with. As our patterns and habits begin to conflict with the expectations of our supervisors, board members, and others, it's increasingly likely we will either resign or be terminated. For example, several of my previous board members were fond of an annual golf tournament that rallied the support of our community. My eventual departure was largely a reflection of the misalignment of my job description and my preference for other areas of responsibility; namely, opportunities for meaningful engagement and the thrill of direct solicitation.

Among a long list of implicit motives, three tend to compel us the most—the need for achievement, the need for affiliation, and the need for power. Regardless of our gender, culture, or age, experts say all of us have some measure of these three motivations. As I continue to work with organizational leaders, board members, and fundraising professionals, I've developed a sense of where each personality finds the greatest satisfaction—or the greatest frustration—in nonprofit settings. I've characterized them as *I'll Lead the Way*, *Let's Work Together*, and *How Am I Doing?*

The 3 Personalities in a Development Office

I'll Lead the Way has a high implicit need for control, or power, and will be at her best when her explicit goals are aligned this need. We understand her need as a desire to influence, control, or impress others—and to receive recognition for these behaviors. *I'll Lead the Way* is eager to break new ground, and she expects others to follow her. She is impatient and, we must note, fearful of betrayal. *I'll Lead the Way* can be counted on to develop a plan and delegate responsibilities, yet she hesitates to be in a setting where she feels out of control. Her preference for control translates into competitiveness and a zero-sum mindset. In other words, there will always be a winner, and there will always be a loser. *I'll Lead the Way* is the most likely of our three colleagues to insist, abrasively, that board members must give, get, or get off.

In working with committees, we would expect *I'll Lead the Way* to be effective at organizing an agenda, handing out assignments, and keeping everyone on task. Where she may find committee work difficult is when she has to follow the lead of a less-experienced (but board-appointed) volunteer chair. Of the three responsibilities *I'll Lead the Way* is most suited for, event planning may be the place where she can truly shine. Unfortunately, she can find it difficult to be patient with a major donor as she cultivates a significant gift. She may also find it hard to envision the exchange as a win-win for both the organization and her donor.

Let's Work Together has a high implicit motivation for affiliation. Naturally, he'll rise to his highest level when his goals harmonize with this. We recognize this need as a concern with establishing, maintaining, or restoring a positive emotional relationship with another person or group. *Let's Work Together* is eager to work as a team, and he expects others to enjoy collaboration as much as he does. (Of course, not everyone does.) He admits he's disorganized and fearful of rejection. *Let's Work Together* is always enthusiastic about building new relationships, but hesitates to work independently. His preference for collaboration and interaction with others will sometimes lead to an unwillingness to work autonomously and an inability to accept responsibility for outcomes.

In committee work, *Let's Work Together* enjoys the collaborative process and willingly allows board members or other volunteers to chair. If he's charged with leading the committee, he may assume too much responsibility himself and fail to delegate. Similarly, organizing a special event will be equally difficult. Fundraising may be the most difficult for *Let's Work Together* when the focus turns toward cultivating individual donors and direct solicitation. He's likely to be especially fearful of the effects a request for funds could have on his relationship with donors.

How Am I Doing has a high implicit desire for achievement and will succeed most easily when her goals line up with this. The need for achievement is an unconscious, recurrent preference for rewarding experiences that relate to improving performance. Thus *How Am I Doing* is eager to pursue reasonable goals, and she expects to receive constructive feedback. She prefers to work by herself, and what she fears most of all is failure. *How Am I Doing* expects clear, measurable goals and would rather work independently or with peers tasked with similar goals. Her preference for independence can lead to isolation and detachment from the team.

When working on a committee, *How Am I Doing* tends to be cooperative, eager to participate in discussions, and quick to define goals and objectives for the matter at hand. However, she can be quite ambitious and is more inclined to work on her own. That way, she can achieve her goals on her own terms.

Most of our executive directors, especially those in small shops, align with my definition of the *I'll Lead the Way* type. They have a sense of where the organization needs to go and are willing to take the lead in making sure everyone gets there. They have a tendency to hire *Let's Work Together*—the friendly, outgoing person who likes making

new friends and working as a team. The problem is, Let's Work Together usually hits a wall when he must ask for money because the possibility of rejection scares him away.

I've noticed small shops are the least inclined to hire and retain our friend *How Am I Doing*. We find it especially difficult to supervise this ambitious go-getter who prefers clear goals and the opportunity to work independently. She tends to step on toes and shake up the apple cart if it's getting in her way. Part of what we misunderstand is that *How Am I Doing* isn't always after a pat on the back or a raise. She thrives on constructive feedback to help her improve her craft. In the absence of a clear measuring stick and helpful guidance, she reverts to whatever performance indicator she can find (e.g., advancement opportunities and pay increases).

So how do we search for—and recognize—the right individuals for the job? I see a lot of fundraising ads that lack an understanding of what it takes to form a lasting, mutually rewarding employment relationship. The ads seem to assume a package of skills that even the most experienced fundraising professionals can't bring with them. Identifying and attracting talent is our critical task of the hour. In the past, nonprofits have often relied on a fundraiser's past performance to gauge how well he will do in their own organization. But this isn't necessarily the case.

You Can't Take It with You

Past performance does matter, but what's important is what candidates bring with them and how well their implicit motives line up with their external goals. My experience indicates I've brought a harmonious passion for fundraising to organizations. When I'm at my best, I'm driven by the opportunity to achieve a goal. This combination, paired with my outgoing personality, has made me a fairly good fundraising candidate and kept me consistently employed. However, what my employers (and I) have also learned is that, regardless of my track record, I can't bring certain aspects of my past performance with me. And it's not just me.

Our value as employees consists of contributions we bring with us because of who we are—*plus* the investments employers have made in us. These are, basically, two different kinds of "human capital." *General human capital* is something that is valuable to a current employer as well as to future employers, such as formal education. *Firm-specific human capital* is usually of worth only to one particular employer, such as customized on-the-job training. Identifying these two types of competencies helps us analyze the value of our employees and how we can further develop them.

Relevant skills and resources that are transportable are quite valuable to prospective employees. However, several are not; they're firm-specific. Naturally, both the previous employer's management practices and its fundraising culture are left behind. But by far the most regrettable resources fundraisers leave behind are the organization's major donors with whom they've developed relationships.

This, of course, is ethical and fair. But here's the thing. It would take a nearly identical (or overlapping) network of donors, along with a similar fundraising culture,

performance expectations and support, to predict an equivalent outcome for an individual. What are the chances of this? Not going to happen.

On occasion, I've spoken with executive directors who were leading a young organization and yet were determined to hire an experienced fundraiser. They hoped this talented professional would bring immediate outcomes and an impressive return on investment. As graciously as I can, I've done my best to explain that this may not work.

In addition to everything a fundraiser might be able to do for the new organization, he will arrive with more expectations than the organization is ready—or able—to provide. What these hopeful leaders often miss is that fundraising professionals inherit their constituencies; they don't have the privilege of creating them from the ground up. This is largely the same for the fundraising culture and their supervisors' expectations.

In situations like this, it's preferable to align the fundraiser's level of experience with the organization's current fundraising capacity. If either significantly outpaces the other in terms of experience, what you get is unmet expectations, either on the part of the fundraiser or the nonprofit. Let's say an organization has been operation in for two years. The likelihood of a robust fundraising program is not so great. Rather than hire a ten-year fundraising veteran, it's more fruitful to identify a relatively new candidate, one as determined to succeed as a fundraiser as the organization is to accomplish its mission.

A study in the late 1990s began tracking high-performing CEOs, researchers, and software developers, as well as leaders in investment banking, advertising, public relations, management consulting, and law. They discovered that top performers in all those groups were unable to sustain their successes after a job change. They were, in essence, more like comets than like stars—blazing successes with their previous employers, but quickly fading out when they left to work for another company.⁷

Researchers followed the careers of 1,052 stock analysts who were ranked best in their fields. "Star" status faded quickly when switching to work for new banks. *Nearly half* of the analysts (46%) experiencing waning job performance in the first year. Not surprisingly, and even higher group, 65%, switched jobs within five years.⁸

Obviously, high-performing stock analysts don't suddenly become less intelligent or lose a decade of work experience overnight when they change employers. What changed was *everything the star couldn't take with her*. In addition to her personal competencies and capabilities, her high performance reflected her customers, the systems and processes of her organization at the time, its infrastructure and culture, and other resources. These all contributed to her success.

While many of us have an instinctive faith in talent, we tend to be unaware of how much a particular organization contributes to a particular employee's success. It's not likely many "stars" would change employers if they understood just how much their performance was linked with their employer. There's a secret ingredient involved that

many of us fail to identify. Vital to an individual's success is an organization that gives talented employees the resources and support they need to become strong performers.

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