By inspiring team members to act in a concerted way to build enduring, values-based organizations, resource development professionals help their nonprofit organizations to realize shared aspirations and visionary goals.

1

Transformational leadership and the resource development professional

Stanley Weinstein

THE NONPROFIT SECTOR and the resource development professionals working in the philanthropic world face a number of interrelated challenges. Too many nonprofit organizations are small, marginal, and duplicative in the services they provide. These organizations often suffer from chronic financial shortfalls. Other nonprofits seem to be fairly strong, but their growth is slow and their impact not what it could be. Relatively few nonprofit organizations are widely viewed as successful, effective, and significant.

At the same time, much is expected from resource development professionals. The vice president for institutional advancement, director of development, major gift officer, vice president for resource development, director of external affairs, campaign manager—whatever their title, people with major fundraising responsibilities are often hired with almost mystical expectations.

Some executive directors and board leaders seem to expect the resource development professional to work miracles independently. Many of our colleagues recall beginning a staff position or consulting assignment by explaining the importance of teamwork. They explained why volunteers with peer relationships to the community's philanthropic leaders should make key introductions. They also stated that the CEO and program officers should help shape the grant applications that they, as development professionals, would write or edit. They further explained the importance of recruiting well-organized "worker bees" to relieve the staff of the burden of staging the special event fundraisers. In short, development professionals seem to understand how nonprofit leaders should work together.

But too often we—the development professionals—are not heard. Nor are we understood when we explain our roles. In follow-up conversations with board leaders and CEOs, we often get the impression that nonprofit leaders think that we (the development officers), working alone, will somehow deliver a large sum of money—equaling the institution's need for contributed income—before the end of the fiscal year. After all, they hired a professional with an outstanding reputation. Didn't they?

Indeed, well-qualified and experienced resource development professionals *do* see that the institutions they serve gain the contributed income they need to achieve their visionary aspirations. The amount raised with professional support is often dramatically increased over previous results.

The point is that the highly successful resource development director is not the Lone Ranger. More likely, he or she is a person with what can best be called the skills and attributes of a transformational leader—a person with the ability to inspire others to act in concerted ways to achieve shared aspirations.

What it comes down to is this: our institutions will remain less than what they could be until such time as we, the development professionals, understand our role as transformational leaders. Together with this deeper understanding of our role comes the concomitant need to improve our abilities to explain, persuade, and inspire. It is not enough to tell others how the development process works. Rather, we must bring about a conversion. We must be understood. The people with whom we are working—the executive directors, CEOs, development colleagues, finance officers, program staff, board members, volunteers, donors, and prospects—must understand the need for a unified vision of the organization's future. This vision should be strategic, significant, and bold. At the same time, the team needs to understand the importance of building positive relationships. We must work well together to maximize our fundraising potential and have the maximum impact on the people we serve.

Let us explore the issues related to transformational leadership. The first part of this chapter, "Understanding Transformational Leadership," focuses on the larger conceptual framework—definitions, skills, tasks, attributes, styles—and the macro issues involved in leadership and management. The second part, "Becoming a Transformational Leader," delves more deeply into many of the closely related *managerial* resource development issues: team communication, staffing, board development, fundraising training, identifying critical success factors, and overcoming common obstacles to fundraising success, growth, and vision.

Understanding transformational leadership

When you think about leadership, a number of definitions probably come to your mind, some historical, some more current:

- Influencing subordinates to behave in a desired manner (Bennis, 1959, cited in Hughes, Ginnett, and Curphy, 1993)
- Directing and coordinating the work of group members (Fiedler, 1967, cited in Hughes, Ginnett, and Curphy, 1993)
- Influencing an organized group to accomplish its goals (Roach and Behling, 1984, cited in Hughes, Ginnett, and Curphy, 1993)
- Doing things through the efforts of others (O'Toole, cited in Bennis, Spreitzer, and Cummings, 2001)
- Setting the vision, mission, values, and culture of the organization (Boverie and Kroth, 2001)

In more general terms, leadership is defined as the art, act, or function of going before or showing the way. The concept of guiding and providing direction is associated with leadership. Similarly, it is not uncommon for people to associate leadership with the concept of innovation.

In Good to Great, Jim Collins (2001, p. 20) describes the "Level 5 Hierarchy." Level 1 is the "Highly Capable Individual," one who "makes productive contributions through talent, knowledge, skills, and good work habits." Level 2 is the "Contributing Team Member." This person works effectively with others and helps achieve group objectives. Level 3 is the "Competent Manager," one who "organizes people and resources toward the effective and efficient pursuit of predetermined objectives." Level 4 is the "Effective Leader," who "catalyzes commitment to and vigorous pursuit of a clear and compelling vision, stimulating higher performance standards." In defining the "Level 5 Executive," Collins combines a description of traits and leadership style. This executive "builds enduring greatness through a paradoxical blend of personal humility and professional will." This latter definition fits the highly successful resource development professional well. It is difficult to imagine our field without the humility needed to organize our work in such a way that others receive the accolades and kudos for fundraising success.

Collins's addition of the idea of enduring greatness is also significant. No doubt, every reader can recall a situation where a non-profit organization achieved extraordinary results through a shared vision and concerted effort. Still, these results may not be of such a lasting nature that one would define the leadership as transformational. Think back to the many museums that have hosted "blockbuster" exhibits. Staging these exhibits requires vision and enormous effort. During the big traveling exhibits, many museums see admission incomes soar while contributions also increase dramatically. Yet many of these same museums never go on to strengthen their internal collections and programs. At times, their case statements fall flat. Their message seems to be, "If we have more money we will be able to host other great exhibits like that past blockbuster show."

Clearly, achieving common goals, while commendable, is not the whole story behind transformational leadership. Many non-profits make their annual goals. The problem is that the goals are often too modest or even misdirected. At other times, as in the museum example, the goal may be significant but not tied to long-term enduring values. So transformational leadership must be directed toward both significant goals and enduring greatness. Thus, I have come to the following definition: *Transformational leadership is the process of inspiring others to act in a concerted way to build enduring, values-based organizations while achieving significant shared aspirations.*

For the nonprofit CEO and resource development professional, transformational leadership involves building positive relationships, building strong and enduring institutions worthy of support, and also attracting the human, material, and financial resources needed to achieve the organization's mission. To be significant and enduring, the organization's mission must remain focused on society's greatest needs. To be values-based, the institution must be driven by shared values and dedicated to creating value. In The Leadership Engine, Noel M. Tichy writes, "Success is adding value. . . . For notfor-profit organizations, the test is whether they are growing and improving their use of assets (productivity)" (Tichy and Cohen, 1997, p. 14). To add or create value, the nonprofit organization must be well organized and capable of leveraging its resources. Whether it is a conservation organization, an educational institution, an arts and culture organization, a health care agency, a faith-based institution, a public television or radio station, or a social welfare agency, the nonprofit must be able to demonstrate to the philanthropic community that it uses its resources in the best way possible. Transformational leaders create nonprofit organizations that are recognized for excellence in several areas: the strength of their board, the strength of their financial management systems and their fiscal responsibility, their excellent administrative and program staff, the strength of their marketing and public relations efforts, their highly effective fundraising and resource development programs, their facilities, and the strength of their mission and programs. In short,

transformational leaders create the kind of nonprofit organizations that attract the best staff and inspire the public's confidence.

A word of caution is due here. With all the focus on leadership and inspiration, one might conclude that motivation, vision, and charisma are the be-all and end-all of transformational leadership. Not so. Recall that Collins added the concept of humility to his definition of the Level 5 Executive. The humility of which Collins spoke refers not only to a self-effacing quality but also to these individuals' ambition, which is directed "first and foremost for the institution, not themselves" (Collins, 2001, p. 21). Eleanor Roosevelt once observed that people could accomplish anything . . . as long as they do not care who gets the credit.

Before we return to a discussion of leadership traits, let us also take a look at the relationship of leadership to management. The differences between the two may be likened to the differences between effectiveness and efficiency. Effectiveness is often equated with doing the right things. Efficiency is doing things the right way. Similarly, leaders innovate and decide what to do. Managers are responsible for getting the job done in the best way possible.

When we think about management, words such as *handling*, *directing*, *governing*, *controlling*, *taking responsibility*, and *accomplishing* come to mind. Some of us begin to think about management traits and focus on the ability to influence through tact as a management function. All agree that management has to do with achieving desired results and outcomes.

Warren G. Bennis's *On Becoming a Leader* (Hughes, Ginnett, and Curphy, 1993, p. 63) describes the following distinctions:

- Managers administer; leaders innovate.
- Managers maintain; leaders develop.
- Managers control; leaders inspire.
- Managers have a short-term view; leaders a long-term view.
- Managers ask how and why; leaders ask what and why.
- Managers imitate; leaders originate.
- Managers accept status quo; leaders challenge it.

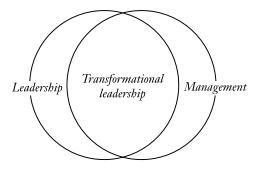
Here is how I like to summarize these distinctions: *Leaders transform*. *Managers perform*.

Another point. We do not live in an either-or universe. Transformational leaders and gifted development officers combine visionary and strategic thinking with solid managerial knowledge and performance. Making a similar point, Bradford and Cohen state:

Often the distinction is made between 'managing' and 'leading,' with the former referring to administering the present organization and the latter connoting a view to the future. But in contemporary organizations both functions are necessary. It may be overstatement to compare managing solely within existing frameworks to rearranging deck chairs on the *Titanic*, but a manager who fails to determine future needs and to move subordinates toward readiness for fulfilling them is courting disaster. Because we think that excellence can be achieved only through simultaneously taking care of the present and planning for the future, the terms *manager* and *leader* are used interchangeably in this book [Bradford and Cohen, 1997, p. 16].

We can readily envision *leadership* and *management* as overlapping spheres. In transformational leadership there is a healthy overlap of vision and managerial ability, and the knowledge and skills in both areas are well developed.

Figure 1.1. Leadership, management, and transformational leadership



Transformational leadership's tasks and skills

Transformational leaders have seven ongoing and often overlapping tasks:

- Understand the current reality.
- Determine a vision for the future.
- Build a strong team.
- Communicate the vision.
- Inspire others to work together to create the new vision.
- Evaluate and monitor progress.
- Celebrate victory.

To be transformational leaders, resource professionals and non-profit executives must understand the importance of each task *and* develop the skills needed to accomplish these tasks. Let us explore each of the tasks. This will help clarify what leaders do. Let us also explore the skills needed to succeed at each task. This will provide us with a road map for developing more effective resource development professionals. Perhaps more directly, it will provide each of us with the tools needed for self-evaluation and growth.

Understand the current reality. Leaders see reality. They "size up the current situation as it really is, not as it used to be or as they would like it to be" (Tichy and Cohen, 1997, p. 28). As a first course of action, resource development professionals must develop reliable baseline information. Management of information technology is clearly a management function, not a leadership issue. However, effective leadership requires us to know how well we are doing. For example, it is difficult to imagine succeeding at increasing the number of annual donors by 50 percent or more if we do not even know how many people contributed during the last twelve-month period. Of course, total dollars raised and the number of donors are hardly adequate information. We should also be able to track results by type of donor (individual, corporate, foundation). We should know the results from each appeal. I have met development directors who could tell me how much "they raised" from their last mailing . . . but did not know how many letters were mailed. Nor did they know the number of gifts that added to the total results. In other words, they got information from the accounting office that indicated that the mail campaign grossed so many dollars. These "development professionals" could not track response rates, average gift, ROI, or any number of factors needed to develop a strong mail program.

For the nonprofit CEO, baseline information is important. So is the ability to conduct a situation analysis. The "SWOT analysis" is a common way of looking at the organization. This involves an in-depth look at internal strengths and weaknesses as well as external spportunities and threats. This analysis should be both objective and thorough. To be sure, you will want to celebrate your strengths and victories. But it also pays to be thick-skinned and willing to take a long hard look at any weaknesses uncovered—either organizational or personal.

This might be a good time to share a lesson I learned many years ago. It is important not to become overwhelmed by facts and analysis. Early in my career I was hired by a nonprofit organization that was experiencing severe cash flow problems. In response, I focused on major gift fundraising. A large pledge—one that the donor could not immediately fulfill—would prove helpful but would not be contributed in time to meet the next payroll. The board president and I felt comfortable borrowing against the pledge. And we spoke about the situation with another board member, John, who was the president of a financial institution. John referred me to his chief loan officer. In turn, this loan officer informed me of all the problems with arranging a loan backed by a pledge. In a short amount of time I became conversant with banking regulations and the internal workings of the financial institution. I reported the situation, and the reasons we probably would not receive the timely loan, to our board president. He said, "The real problem isn't the circumstances the loan officer and you have outlined. The real problem is that John hasn't decided to make that loan. Call him and tell him how important it is to the organization that we get that loan and meet payroll." I did, and John brought all the necessary loan documents to me that same day.

To summarize the lesson learned: it is not the situation; it is the people that matter. When movers and shakers decide to move and shake, nearly any obstacle can be overcome. As Larry Bossidy, CEO of AlliedSignal, put it, "At the end of the day, you bet on people, not strategies" (Tichy and Cohen, 1997, epigraph). With these points in mind, insightful development professionals and nonprofit leaders take a long and hard look at who is "onboard for the trip." Your situation analysis should likewise include an objective observation of the relative strength of your board, staff, and volunteer pool.

One more cautionary note: do not mistake the recommendations for careful analysis as an excuse for inactivity. Beware of "analysis paralysis." General Patton asked his staff to make every effort to get all the facts before making a decision. He also put a time limit on when the collection of data had to be finished. The guiding principle seemed to be "Too much if'n, perhaps'n, and maybe'n, will never win the battle" (Williamson, 1979, p. 115).

Determine a vision for the future. Strategic thinking requires us to develop the ability to focus on external factors . . . and the people served. In Managing for Results, Peter Drucker points out that "neither results nor resources exist inside the business. Both exist outside" (Drucker, 1964, p. 5). Inside the nonprofit organization there are only cost centers. Whether the service providers, marketers, resource development professionals, and other staff are effective will be determined by people outside the organization—the service users, prospects, and donors. If your thinking is focused on internal battles and organizational minutia, you are probably missing the big picture. The world we live in is changing. To remain vital and significant, your organization must be able to articulate a vision of the future that is responsive to the changing world.

Please do not misinterpret this advice. Internal systems do matter; your vision should also include strengthening your internal operations. It is rewarding to envision and help establish a well-oiled fundraising machine. The ability to create improved processes is definitely an important factor in defining a nonprofit organization's vision of the future. The main point here is that all the techniques and systems in the world will come to naught if they do not focus on strengthening positive relationships with donors and potential donors. Please also remember that your prospects and donors will respond generously only if they believe your organization merits support.

To be worthy of support, your organization must have a clear sense of mission. Once this is clarified and the organization's focus is well understood, the next step is continually to strengthen its services. Nonprofit organizations exist to serve and leaders should periodically ask themselves the following questions (Weinstein, 2002, p. 15):

- Who are we serving?
- Are our services effective?
- Are we providing the services in the most cost-effective manner?
- Are there others who need our services whom we are not serving?
- Are there other services we should provide that we are not providing yet?
- Are there others working on the same problem with whom we can collaborate?
- Are we taking the steps necessary to recruit and train the best service providers possible?
- What steps can we take to strengthen our services?

In creating the vision, nonprofit leaders need to consider multiple alternatives. Too often, several participants in each meeting jump to conclusions and recommendations prior to hearing all the ideas that could have been developed. This tendency can lead to poor decisions. It certainly stifles innovation and creative solutions. To stimulate creativity, ask questions. Dundon, in *The Seeds of Innovation*, recommends asking, "Why are we doing this? Why are we doing this like this? What if? What else?" (2002, p. 38).

Resource development professionals who are also transformational leaders are tuned into the need to create buy-in during the solution formation process. It is not enough to be able to articulate a vision of the future. It is more important to have all the key stakeholders come to the same conclusion, with each team member believing that the vision is one that he or she helped create. On this point, Kouzes and Posner wrote:

In some ways, leaders live their lives backward. They see pictures in their mind's eye of what results will look like even before they've started their project. . . . Their clear image of the future pulls them forward. Yet visions seen only by leaders are insufficient to create an organized movement or a significant change. . . . A person with no constituents is *not* a leader, and people will not follow until they accept a vision as their own. Leaders cannot command commitment, only inspire it. [Kouzes and Posner, 1995, p. 11]

Build a strong team. Strong leaders and managers have strong staffs. They are not afraid to surround themselves with people who may be smarter than they are. Strong leaders develop expertise in recruiting outstanding employees. Great leaders and managers know how to encourage strong candidates to apply for each position. Such leaders know how to interview and recruit the best applicant. When interviewing, they ask involvement questions such as these:

- What was the largest individual gift you played a role in securing? What were the circumstances and what did you do that helped motivate the gift?
- Describe a situation in which you made a mistake you learned from. What was the mistake you made? What did you learn from your mistake?
- Have you ever disagreed with a volunteer? What were the circumstances? How did you handle the situation?
- Tell us about a time that you had to use negotiation skills to persuade your employees or peers to work together. What were the circumstances? How did you use your skills?

Of course, you may also want to ask some of the more traditional questions:

- What are your greatest strengths and weaknesses?
- Where do you see yourself in five years?
- What do you know about our organization? (King, cited in Wagner, 2002)
- Why do you want to work for us? (Wagner, 2002)
- What qualities and experience do you have that are important for this fundraising position? (Wagner, 2002)

Coaching skills are also a prerequisite for success. Thomas G. Crane, in *The Heart of Coaching*, defines transformational coaching as "the art of assisting people to enhance their effectiveness, in a way they feel helped" (2001, p. 31). One central skill required for successful coaching is appropriate use of language and word choices. *You* messages sound judgmental and lead to defensive reactions. For example: "You left several typos in this letter." *I* messages denote self-responsibility and are easier to listen to. For example: "I am concerned that donors might misjudge our organization's effectiveness. Even relatively small matters like typos can become large to some donors." *We* messages include others and stress teamwork. For example: "We can work together to see that all the materials leaving our office create the best impression possible." Crane and others recommend lots of *I* messages and very few *you* messages (Crane, 2001).

Should versus could language is another area that could help or hinder team building. Should sounds controlling. "Could is more open and sets up additional possibilities in our thinking, acting, and cooperating" (Crane, 2001, p. 92). Similarly, but versus and is worthy of attention. But cancels out what was said prior to the but and sounds argumentative. And feels inclusive and is more respectful. In fact, I have always contended that no one ever hears what the speaker says after the word but. "Yes...but..." does not work. "Yes...and...." does work. This language is also helpful in forming partnerships with donors who have objections. Here are some example not to emulate: "Yes, our institution had some financial difficulties several years ago. But we are taking steps to be fiscally responsible." A better alternative: "Yes, our institution had some

financial difficulties several years ago. *And* we listened to people who had the same concerns as yours *and* we've put in place new policies and control systems that will keep us strong so we can continue to provide the level of services our community has come to expect."

The ability to inspire is key to building strong teams. Here again, language is important. Managers and leaders who say, "I'll try" or "Well, I tried" give everyone in the organization an excuse for not succeeding. "I will" conveys a stronger commitment. So, avoid "weasel" words "that psychologically leave a back door open to failure" (Crane, 2001, p. 93).

Of course, the ability to inspire is not solely reliant on choice of words. The team leader must walk the walk as well as talk the talk. It will hardly do to say that you are open to new ideas if you are not willing to seek honest and frank input. To retain productive team members, be sure that they know that their ideas and contributions are valued. On a related point, Boverie and Kroth's research on what they term *passionate work* and *occupational intimacy* found three keys to creating passion in the workplace:

- Love of work. Employees and team members are most productive
 when they enjoy their jobs. The workplace should be fun. Colleagues should be enthusiastic. People do well when they are
 placed in jobs for which they are well-suited. Employees who
 join conservation nonprofit organizations because of their love
 for the great outdoors might be ineffective in a records management position that keeps them inside.
- *Meaningful work*. We often talk about the need to state the case for support. We understand why potential supporters need to hear about all the good things our institutions do. Let us also not forget the importance of internal communications. Our colleagues in the nonprofit sector should not find it difficult to find fulfillment and meaning in their work. It just helps to remind ourselves why we work so hard.
- A nurturing workplace. Boverie and Kroth describe the components of a nurturing workplace: a caring, understanding, and flexible environment; concern for the work; caring for and being

considerate of coworkers; respecting employees' ideas; getting to know employees and colleagues as people; and having compassion for our humanness. In short, in a nurturing workplace we really care about the people with whom we work (Boverie and Kroth, 2001).

Please note that I left compensation as a factor in building strong teams until the end of this discussion. Too often managers equate compensation with motivation. However, pay may not be an effective motivator for a number of reasons. Pay is not always seen by employees as related to job performance. Monetary compensation is often viewed as inequitable. Finally, some managers who focus on money as the prime motivator ignore the importance of job satisfaction (Anderson, 1984). Transformational leaders are very concerned with job satisfaction and rewards. They help create meaningful work for human beings. They hire strong people. They recognize achievement. They help the people with whom they work to grow.

Development directors are at times contradictory in their attitudes about recognition. They may understand the importance of a well-developed recognition program for the donors but be parsimonious in their thanks to staff. I recall once recommending the creation of a donor recognition program as integral to a major gift initiative. The development director with whom I was speaking said, "Oh, people don't really relate to that stuff. We could use the money we would have to spend on plaques more effectively." I replied, "Really? Please turn around and look at the wall behind you." Behind the development director was her "I love me" wall. It had at least fifteen plaques and framed appreciation certificates. From the time we are in elementary school and first get a gold star next to our names until the present, tangible signs of appreciation remain important to us. I have met quite a few people who recall their first Red Cross or "Community Chest" lapel pin with great fondness. More than one became teary-eyed and nostalgic at the memory. The lesson is a simple one. Just as recognition and meaning are important to donors, so too are they important to the people with whom we work.

Communicate the vision. Communicating your organization's vision to some people close to your nonprofit may not be a problem. After all, one of our goals is to create buy-in. Therefore, many of the key stakeholders will already be onboard. They know why the organization's programs and services are needed. They understand the changing environment and how the nonprofit organization will respond with strategic solutions and innovative approaches. They understand what resources are needed to bring about the new vision.

But for others, the conversion process has not yet begun. Many staff members still do not get the big picture. Even more donors and potential donors have not even begun to think about the organization's future. They probably do not even have a full appreciation of the current work the organization is doing. These are the main reasons why we see the words "exceptional communication, writing, and verbal skills required" in job announcements for development professionals.

So, resource development professionals and transformational leaders work to understand their employees' strengths and weaknesses as communicators. They know how hard it is to be heard and understood. They study how people process information. They strive to be clear. They work to simplify their messages. They go to seminars and train-the-trainer workshops to learn how to make effective presentations. They practice making inspirational talks. They take advice from colleagues and mentors. In short, this is the key area in which they strive to make continual improvement.

Still, communication is difficult. Often, listeners hear with their filters on. They come with prejudices and well-formed conceptual frameworks that are not easily challenged. At times the listeners are drifting. Their attention is not held. The messages do not "stick."

On this point, Malcolm Gladwell describes what he calls the *stickiness factor*: He describes an experiment designed to see if college seniors could be persuaded to get tetanus shots. One group of students was given a "high fear" version of a brochure. Others received a toned-down "low fear" version. The initial results were

predictable. Both groups of students when tested seemed to understand the dangers of tetanus, and those who received the high fear version *said* that they intended to get inoculated.

However, one month after the experiment, only 3 percent of the students actually went to the health center to get inoculated. In both cases, the message did not stick. When the experimenter, Howard Leventhal, repeated the experiment with one change the vaccination rate went up to 28 percent. The change was a simple one: the brochure was accompanied by a map of the campus with the health center circled and a clear listing of the times that shots were available. Of the 28 percent who got inoculated, equal numbers were from the high fear and low fear groups. The extra persuasion in the high fear brochure was irrelevant. What did matter was the how-to information and the clarity of the message (Gladwell, 2002).

We all want to believe that the key to making an impact on someone lies with the inherent quality of the ideas we present. But in none of these cases did anyone substantially alter the content of what they were saying. Instead, they tipped the message by tinkering, on the margin, with the presentation of their ideas. . . . Howard Leventhal didn't redouble his efforts to terrify his students into getting a tetanus shot. He just threw in a map and a set of appointment times. . . . The lesson of stickiness is the same. There is a simple way to package information that, under the right circumstances, can make it irresistible. All you have to do is find it [Gladwell, 2002, pp. 131–132].

Experienced development professionals and transformational leaders understand how a simple draft case for support often inspires more donations than the glitzy award-winning campaign brochures. Too often we obscure our messages with overproduced, busy campaign materials. Key messages printed on top of a 10 percent screen of a moving photograph cannot resonate with donors. They neither read the message nor see the photograph.

To communicate your vision of the future, you may wish to consider the stickiness factor. You might ask yourself: Am I keeping the

message as simple as possible? What distractions should I eliminate to keep the message focused? What information do the people with whom I am communicating need in order to act? How can I make the main message and shared vision irresistible?

Inspire others to work together to create the new vision. The preceding section describes how to recruit and retain strong performers. This section discusses team building and keeping the work focused on the vision. Some related leadership skills and tasks are obvious: the ability to reinforce positive team attitudes and behaviors, the ability to help set individual and team goals, and the ability to model constructive behaviors. And it might be worth repeating here that the ability to recognize and reward achievement remains a critical success factor in any transformational process. Change is difficult. In response, we can recognize those who accept change and help improve the situation. This can be a healthy alternative to the natural attention given to recalcitrant team members, those resistant to change.

Many of the books listed in the References discuss empowering employees, encouraging risk taking, the need for strategic focus, and team building. We need not delve too deeply into these issues here. Rather, it might prove beneficial to focus on an issue that is important in the nonprofit sector: the ability to inspire trust. When discussed in the literature, the writing focuses on brand building, brand loyalty, or simply branding. That language does not always resonate in the philanthropic sector. Oversimplified notions of "recognizable logos," the importance of a consistent visual image, "tag lines," and "investments in marketing" come to mind. But trust goes deeper than that. It has often been observed that who we are speaks one thousand times more than who we say we are. Trust is built over years. In our teams, trust is created each time we live up to or exceed expectations. Trust built over years can be shattered in days over a scandal or poorly handled situation. Similarly, our fellow team members must know that they can rely on us. Transformational leaders produce outstanding work products in a timely fashion. They inspire their teammates to do likewise.

This need for trust is especially important when defining the relationship of staff to board members. You might wish to consider the following "rules" of time management for development professionals:

- Rule 1. Remain focused on your highest priorities: building relationships, communicating the vision, and developing and implementing cost-effective fundraising strategies.
- *Rule 2.* Requests from board members are also among your highest priorities and require timely attention. Without the trust of your board members, you cannot accomplish Rule 1.

Keeping the team focused on high priorities is not always easy. Gifted development officers are often viewed as ombudsmen. They are gifted with problem-solving attitudes and abundant people skills. No wonder they are called on to handle a wide range of issues not strictly related to resource development. Still, transformational leaders help keep their colleagues focused on shared objectives. Experienced leaders, managers, and coaches also help their team members learn how to handle multiple projects and competing priorities. After all, if it were simple, anyone could do it.

Evaluate and monitor progress. One of the joys of working as a resource development professional is that our results are measurable. Year after year we work with annual, capital, and endowment campaigns. We set goals and celebrate when we meet these goals. We have software that can tell us how much individuals, corporations, foundations, and associations contributed. We know the results of our mail campaigns. We take pride in our special event sponsorships. We take delight in describing the million and multimillion dollar gifts we helped to secure.

But there are limits to evaluation tools. "No form can accurately capture the warmth experienced when dealing with another person. However, the outcome of such encounters can be measured. People who are kind and gracious in their dealings with their constituents garner more support for their organization than those who never learned how to relate well with other people" (Weinstein, 2002, pp. 319–320).

Chapter Sixteen of the *Complete Guide to Fundraising Manage-ment* (Weinstein, 2002) covers resource development evaluation. It contains a quick self-test and an in-depth development office self-evaluation. Part I of the longer self-assessment focuses on fundraising results (amount raised from each appeal, number of donors, analysis of contributed income from major gifts, a breakdown of gifts in each gift range, and so on). Part II of this self-assessment focuses on measuring methods and means (numbers of mailings, numbers of personal contacts, strategies employed, and so on). Because I discuss this elsewhere, I will not delve into that material again here. Besides, that level of detail is more of a managerial concern than a leadership issue. However, it is good to remind ourselves that transformational leadership also involves strong management skills.

A point that might be prudent to make here is that we need not only to monitor the results but also to take action and adjust the plan as circumstances change. Leaders and strong managers create and monitor realistic time lines. They have time to approach additional prospects if the organization's top prospects are slow to respond to giving opportunities. Their event sponsors are secured months in advance. When their nonprofit organizations are *not* moving inexorably toward their fundraising goal, effective leaders know how to "turn up the heat." They do not simply fall behind. They call the movers and shakers and urge them to make their appointments. They identify additional opportunities. They motivate the team to work harder and ensure that the goal will be met. They remain focused on outcomes. Transformational leaders return to their main messages; they get everyone focused on the inspirational case for support and vision for the future.

Celebrate victory. After all the hard work, nothing can compare to the exuberance and joy of victory. Transformational leaders do not let their volunteers fail. The development staff celebrates while remaining humble. In all of our public events we recognize the achievements of our donors and volunteers. We are careful to maintain balance in these presentations. The actual contributors receive the bulk of our gratitude. We also express profound appreciation for the work of our volunteers and campaign workers.

In the transformational leader's development office or nonprofit organization there is a sense of fun. I recall one workplace where the development director had a ship's bell over his desk that he would ring every time the organization received a contribution of \$25,000 or more. Each organization's culture is different. Each staff has its own personality. The successful team develops its own celebration "shtick." You should, too. Enjoy.

Emotional intelligence

A discussion of leadership would be incomplete if it did not cover what Goleman, Boyatzis, and McKee (2002) refer to as emotional intelligence. In *Primal Leadership: Realizing the Power of Emotional Intelligence*, the authors describe emotional intelligence and associated competencies: personal competence, which includes self-awareness and self-management, and social competence, which includes social awareness and relationship management.

Personal competence. The two components of personal competence—self-awareness and self-management—determine how well we manage ourselves. Please note that these competencies "are not innate talents, but learned abilities, each of which has a unique contribution to making leaders more resonate, and therefore more effective" (Goleman, Boyatzis, and McKee, 2002, p. 38)

- Self-awareness. This competency includes emotional self-awareness, self-assessment, and self-confidence. "Self-awareness means having a deep understanding of one's emotions, as well as one's strengths and limitations and one's values and motives" (Goleman, Boyatzis, and McKee, 2002, p. 40). It is easy to recognize and deal with enthusiasm and joy; these emotions have a positive impact on the work environment. But effective leaders must also recognize their negative emotions—anger, fear, and frustration—and how these emotions affect the work environment. Emotional intelligence requires us first to recognize these emotions in ourselves.
- Self-management. This includes six competencies: emotional selfcontrol; honesty, integrity, and trustworthiness; flexibility; achievement and drive for excellence; initiative; and optimism.
 Concerning emotional self-control, it is unlikely that nonprofit

leaders or resource development professionals can succeed without being able to handle their emotions. No one wants to work for an angry boss. Prospects can sense frustration. Self-mastery is a prerequisite for success. Similarly, successful nonprofit leaders are recognized for their honesty, integrity, and trustworthiness, as well as for the other competencies listed earlier.

Social competence. The two subsets of social competence—social awareness and relationship management—determine how well we manage relationships. As with the personal competence factors, these competencies can be nurtured and developed. They are not innate talents.

- Social awareness. This competency includes empathy (sensing others' emotions and points of view), organizational awareness (staying tuned in to decision networks and organizational politics), and service (meeting follower and client needs). When we speak of empathy, we are reminded that development professionals are constantly admonished to listen more and speak less. As important as listening is staying alert to body language and other clues as to a donor or a colleague's feelings. At the same time, many great leaders are acutely aware of the nitty-gritty in organization behavior. They may not always be interested in process, but they are tuned into the work world around them. Perhaps no competency more dominates the nonprofit world than the dedication to service. Our organizations exist to serve the public. Resource development professionals work to serve our prospects and donors. We would do well to translate this same strength to serving each other inside the organization. Transformational leaders create an environment where colleagues support one another.
- *Relationship management*. This set of competencies included here should be a comfortable fit for development professionals. Many of these competencies and attributes coincide with those of our profession. Let us look at Goleman's competencies, but with a philanthropic world focus:

- *Inspirational leadership:* Many nonprofit leaders and development professionals aspire to motivate others with a compelling vision. Transformational leaders inspire confidence. They unite the community around a compelling vision.
- *Influence:* We recruit people of affluence and influence. We study the persuasive arts. We employ a wide range of communication strategies and tactics. And in the philanthropic world, transformational leaders remind us to exert our influence in a sincere, gracious, and respectful manner.
- Developing others: We not only work to develop our staffs but also work to develop our board of directors and pool of volunteers. We invest in training. We become effective coaches. Transformational leaders in the nonprofit world recognize talent and develop it.
- *Change catalyst:* New directions, innovative solutions, and major initiatives are the sine qua non of transformational leadership.
- Conflict management: As in the private sector, conflicts are inherent in the nonprofit world. Healthy and constructive conflict is encouraged; varying points of view are championed. At the same time, less healthy forms of conflict such as personality clashes or petty disagreements are discouraged, managed, and resolved.
- Building bonds: We nurture positive relationships with a wide range of stakeholders. We form partnerships with our donors and prospects. Transformational leaders value true friendships. They stay in touch with supporters and potential supporters. The bonding is mutual and respectful.
- Teamwork and collaboration: Nonprofit organizations flourish when staff members work well with one another, when board and staff roles are clear and relationships strong, when volunteers are respected and enjoy their work, and especially when donors feel they are members of the team.

Leadership styles

Even the casual reader of the leadership literature will notice a broad spectrum of descriptions of leadership styles. Greenleaf (1997) writes about the "The Leader as Servant." Apps (1994) tells us that leaders manifest several important qualities and characteristics: passion, awareness of personal history, spirituality, and balance. Tichy informs his readers that "great leaders are great teachers" (Tichy and Cohen, 1997, p. 41). Wheatley says, "Leadership, an amorphous phenomenon that has intrigued us since people began studying organizations, is being examined now for its relational aspects. More and more studies focus on followership, empowerment, and leader accessibility. And ethical and moral questions are no longer fuzzy religious concepts but key elements in our relationships with staff, suppliers, and stakeholders" (Wheatley, 1994, p. 12). Robert R. Blake and Anne Adams McCanse, in their famous grid, define leadership styles and behaviors as a balance between concern for people and concern for results (Blake and McCanse, cited by Hughes, Ginnett, and Curphy, 1993).

If we are not confused by the literature, our own observations will lead us to believe that no one style or personality predicts leadership success. We all have memories of a number of successful leaders, all with their own unique style and personal presence. Still, research does provide clues into how leadership styles influence our organizations. Goleman informs us that research and analysis indicate that "other things being equal, leaders who used styles with a positive emotional impact saw decidedly better financial returns than those who did not. Perhaps most important, leaders with the best results didn't practice just one particular style. Rather, on any given day or week they used many of the six distinct styles—seamlessly and in different measures—depending on the business situation. Imagine the styles, then, as the array of clubs in a golf pro's bag. Over the course of a match, the pro picks and chooses from his bag based on the demands of the shot. . . . That's how high-impact leaders operate too" (Goleman, Boyatzis, and McKee, 2002, p. 54).

Let us examine Goleman's six leadership styles. An understanding of these can help nonprofit leaders and resource development professionals to understand when each style may be appropriate. It is important also to understand the impact that each of these styles can have on an organization.

Visionary. This leadership style places an emphasis on shared dreams. It is analogous to what I have been describing as transformational leadership throughout this chapter. This style has the strongest positive effects on the organization. Nonprofit leaders should adopt this style when their nonprofit organizations require a new vision or when the institution would benefit from taking a quantum leap forward.

Coaching. This leadership style connects the aspirations of each employee and stakeholder with the organization's goals. It has a highly positive impact on the organization. All leaders and managers who want to help their employees and volunteers to improve performance find this approach to building capacity beneficial.

Affiliative. This leadership style creates harmony by linking the organization's people with each other. It has a positive impact on the corporate climate too. It is appropriate when the leader needs to heal rifts or motivate others during stressful times or wants to strengthen ties to the organization.

Democratic. This leadership style gains commitment through input, buy-in, and participation. The emotional impact on the organization is also positive. This style works well when consensus and buy-in are needed. Development professionals know that fundraising success is greater when donors feel that they have participated in shaping the organization's decisions. Therefore, they seek their input and advice prior to major campaigns. Input from employees also helps create team consensus.

Pace-setting. This leadership style emphasizes challenging and exciting goals. Its impact on the organization is often negative because the style is frequently poorly executed. Many of our colleagues recall being put in a position where an extremely ambitious and unrealistic goal was thrust upon them. A challenging yet feasible goal may have been recommended. But the board or executive director used the plug number approach to goal setting. They seemed to be saying, "This is what we want to do. We know this is a very large amount of money and far more than we have ever raised. But this is the goal, and you are the fundraiser. Make it happen." At times the pace-setting leadership style gets high-quality

results from an experienced and motivated team. But more likely, team members will be demoralized.

Commanding. This leadership style can eliminate fear and uncertainty during an emergency. The emphasis is on clear and uncertain direction delivered by an authority figure. Because it is so often misused, its impact is highly negative. However, the commanding leadership style has proven appropriate during crises, turnaround situations, to kick-start a project or organization, or to deal with problem employees. Even in the most compassionate nonprofit organizations, there are times when it has to be "my way or the byway" (Goleman, Boyatzis, and McKee, 2002).

Earlier we quoted Goleman and his observation that the real pro uses a wide range of leadership styles based on the organization's circumstances and the specific situation. Visionary leaders or transformational leaders are more than charismatic figures who inspire people to be forward-looking. These leaders have extraordinary levels of emotional intelligence. At times they are coaches. They are often democratic. The affiliative style is certainly part of their repertoire. The higher-risk or potentially negative leadership styles may also play a role, but transformational leaders mainly stay attuned to the approaches that are most likely to have a positive impact on their organizations.

Additional thoughts

Let us take a look back at some of the lessons we have learned in Part I. I hope you informally assessed your own traits, behaviors, skills, emotional intelligence, and leadership styles as you read the chapter so far. If so, the following advice might reinforce some of the conclusions you already have reached. If not, these points can serve as a valuable tool as you continue your self-assessment and growth.

Focus! Focus! Focus! Transformational leaders build on strength. They recognize and continually strengthen their core competencies. They know how to define a vision of the future. They remain focused on high-priority activities. As they focus on

results, they also focus on nurturing positive relationships with a broad range of stakeholders. Transformational leaders build significant and enduring institutions by focusing their organization's attention on the vision, the future, and the people served.

Resource development professionals and transformational leaders *remain focused on their strongest programs*. If the organization has strength in grantsmanship, it does not abandon this strategy in search of some elusive notion. Rather, it builds on the strong grants program and might *add* a major gifts program. By *building an additional core competency*, the transformational leader can revolutionize the organization and dramatically increase contributed income.

Remember that it is not the situation, it is the people. Transformational leaders recognize the importance of people, their motivations, and feelings, rather than simply dealing with the facts, circumstances, and situations. They ask themselves: "What is the situation as it now exists? What would the ideal future be like? What steps are needed to create an enduring and significant organization that better serves the people who need our services? What steps are needed to get to the ideal future? What person or persons can help or hinder the changes needed? What is their motivation and stake in the process? How can I best motivate them and align them with the new organization goals?" The ability to answer these questions and act positively on them defines the transformational leader.

Think and act creatively, strategically, and practically. We all have met dreamers who can describe the most creative worlds imaginable, yet few achieve their full potential. Clearly, creativity and innovation are not enough. Transformational leaders must also learn to think and act strategically and practically. Dundon (2002) points out that creativity leads us to discover new and innovative ideas. Strategic thinking determines whether the idea is also useful. Practical thinking and action are also vital to transformational leadership. Such thinking requires leaders to ignite passion and take action.

Remember that patience and perseverance pay. People resist change. It takes time for new messages to be understood. The deepest commitments come from a conversion process. Donors

need to internalize the case for support. Staff needs to buy in to the new paradigm. Big dreams, visionary aspirations, and significant results often take months, years, and even decades. Small people put up unexpected and annoying roadblocks. Many criticize and say why something cannot be achieved. Frustrations and anger can arise. Still, the transformational leader at times appears unflappable. All such leaders remain persistent. They have patience and the ability to persevere. They know that "today's mighty oak is just yesterday's nut that held its ground" (Dundon, 2002, p. 170).

Becoming a transformational leader

Resource development professionals exert their leadership qualities in the upper middle of the organization. In some smaller nonprofits, the CEO is the primary fundraiser. More often, the chief development officer reports to the CEO. Therefore, to have the maximum impact on the organization's vision of the future, the chief development officer must possess great communication skills. Emotional intelligence, sensitivity, and tact are prerequisites for success. So too are persuasiveness, clarity, and the ability to explain issues to often-resistant stakeholders. Let us also not forget the ability to inspire and motivate.

Of course, inspiration and motivation can only have their fullest impact if transformational leaders, whether top management or middle managers, combine the art of persuasion with solid execution. Unfortunately, many well-meaning and otherwise inspira-tional executives get caught up in the obstacles to resource development success. Without care and caution, they can be defeated by these difficulties. Some even develop a "victim mentality."

So what are the issues that some "victims" in our profession view as the bane of their existence? Even those who are relatively new to the development field have heard the seven mantras of those who succumb to the obstacles that we all face: "My organization does good work but doesn't have any projects or dreams that really appeal to the broader philanthropic community."

"How do they expect me to raise money when no one has ever heard of this institution?"

"We have a weak board. Most members aren't 'plugged in' at all. And the few board members who are don't make their fundraising calls."

"There are no corporations in my city. And this is not a very affluent town."

"There is so much to do and I don't have the staff to do it. Besides, I don't have enough money to hire a good staff."

"My CEO doesn't understand that we need resources to raise money. And the board doesn't understand that you have to spend money to make money."

"My CEO and board expect me to raise the money all by myself. I'm not sure that they or I understand the development officer's role."

It is easy to view these common complaints as two sides of the same coin—the obstacles to success and the critical success factors on which to focus. Let us look at the preceding seven mantras of the weary. The first two indicate that the nonprofit organization has not developed a vision of the future or communicated its case for support to its constituents, stakeholders, and potential donors. Complaint number three indicates that the organization has not yet devoted sufficient attention to board development. An additional problem uncovered in the third complaint is that the development officer has not yet developed a successful model for fundraising training and motivation. Nor has he or she fully understood the role of the professional. The fourth lament indicates that the resource development director has not yet resolved all the issues related to prospect identification and cultivation. The fifth common complaint is symptomatic of those who have not learned how to manage for results and to staff from strength. The sixth is also related to the development director's skill in the persuasive arts. The development

director not only needs to be able to articulate an organization's case for support and vision for the future but also to persuade others to invest in resource development. Finally, the seventh complaint relates to the essential need to understand the *role of the resource development professional*.

No conversation about critical success factors would be complete without a reminder to build on strengths. Too often, organization leaders spend a great deal of time identifying weaknesses and devoting resources to eliminating them. A better first step is to focus on the organization's core competencies and what it is doing well. Do not neglect these success areas. Build on these strengths. For example, if your direct mail program is strong, consider increasing the number of acquisition mailings. Analyze the benefits that might accrue from increasing the number of renewal and upgrade mailings to the in-house list. Strengthen the organization's ability to segment and personalize the mailings.

After assuring yourself that your approach builds on strength, focus on the critical success factors and fundraising strategies that will have the greatest impact on your organization. The preceding list of complaints represents what the pessimistic person might view as the obstacles to success. More positive and optimistic professionals see each of these critical success factors as opportunities. To keep these issues in perspective, I like to remind new people in the field that if our nonprofit organizations had visionary cases for support, strong boards of directors who made their calls, and adequate resources, they would not need fundraising professionals.

It is not my purpose here to review all of the fundamentals that you can find in many fine fundraising books, such as Jim Greenfield's Fundraising Fundamentals (1994), Kay Sprinkel Grace's Beyond Fund Raising (1997), Harold J. Seymour's Designs for Fund-Raising (1966), or my book The Complete Guide to Fundraising Management (Weinstein, 2002). Rather, these critical success factors are outlined to stimulate your thinking and self-examination. Transformational leaders master the fundamentals. They may focus on articulating lofty aspirations for their institutions. But they only succeed if they are also brilliant managers or surround themselves with people with

exceptional management skills. With these thoughts in mind, let us reexamine some of the basics—the critical success factors without which no dream can come to fruition.

Vision and case for support

We are told, "Without vision, the people perish." In modern times, we have seen presidencies fail over the "vision thing." Likewise, nonprofit organizations limp along and remain marginal if their leaders do not have a clear understanding of the organization's mission and direction.

Yet it is rare to find an organization where *all* of the key stakeholders can articulate a unified view of the organization's goals and aspirations. Strategic planning processes can help unify the organization. Writing a case for support and having the key stakeholders reach agreement on the case helps clarify everyone's point of view. And later preparing the case for support in a number of formats (formal comprehensive case statements, one-page case statements, brochures, videos, CD-ROMs, PowerPoint presentations, and so on) for your various constituencies can further help you communicate your organization's vision.

The important thing for transformational leaders to remember is that the true case for support does not exist on paper, on video, or in any media; it can only have meaning in the prospect's mind. Unless a conversion process has taken place, all your marketing efforts and fancy materials will go for naught. Current and prospective donors must internalize the case. Your message must resonate with your prospects. The organization must be recognized as worthy of support. Your vision must be significant, bold, and memorable.

While discussing bold and significant dreams, it might help to talk a bit about capital campaigns. Again, whole books have been written on this subject. One point that is often overlooked, however, is the unifying and problem-solving outcome that is brought about when a nonprofit organization's board and staff leaders commit to a capital campaign. Perhaps we would do well to rename our "Facilities Planning Committee" and refer to it instead as the "Vision Committee." People who may not be interested in board

development, records management, prospect research, relationship nurturing strategies, fundraising training, and a host of related organization development issues will focus on and address these challenges when they see them as prerequisites to the success of the campaign. The vision is the driving force. The facilities contemplated are designed to strengthen the organization's mission and services. Alone, these critical success factors are viewed as abstractions. In the context of a campaign, the board and staff unite to address the issues, strengthen the organization, and achieve the vision.

Board development

"Every nonprofit CEO dreams of the possibility of working with a strong and involved board of directors, yet few organizations realize their full potential. They find it difficult to recruit people of affluence and influence and get them engaged in the institution's mission. . . . Clearly, a new and fresh approach is needed when discussing board development. Too many myths and near-myths surround the subject" (Weinstein, 2004, p. 39). Chapter Three of Capital Campaigns from the Ground Up describes how to build strong and committed board of directors. Let me summarize some of that chapter's main advice (Weinstein, 2004):

- Think strategically. Determine your board's strategic needs before the nominating committee members start suggesting names. Clout is a must. Program knowledge is helpful. Financial, legal, accounting, marketing, and other specialized skills are probably needed. And do not neglect the big two: affluence and influence. Personal qualities such as enthusiasm and integrity are also required of each board candidate.
- Broaden the list of people considered. If you only consider friends
 and acquaintances of nominating committee members, your
 board will probably not advance. Again, think strategically. Identify many people you would like to have serve—not only those
 you think you can recruit. Also be sure that your list of qualified
 candidates is long enough. Some of your candidates will not be
 able to serve. (Do know, however, that the attempt to recruit

them is a helpful gesture in the cultivation process.) But with a thoughtful and gracious approach, many will accept your offer to serve.

- Find several key people willing to make introductions. Your current board members who have peer relationships with movers and shakers are your best bet. If your organization is not yet blessed with such members, go beyond your current members to seek the help of old friends, business associates, past board members, executive staff, fellow members of service clubs, and others. In every case, seek enthusiastic, knowledgeable, and positive people to help with your recruitment process.
- Learn the language of recruitment. Passionate people get to "yes" often. Potential board members sense their enthusiasm and buy into their vision. People with major gift experience know that the language and steps for board recruitment are similar to the most important solicitations made on behalf of the organization. Building rapport, stating the case, and listening are important ingredients for successful recruitment. So too is the ability to handle objections and respond appropriately. Know what to say when the prospect inevitably says, "I'm too busy." Point out that the staff provides valuable support. Promise never to waste the community leader's time. Ask about what kind of support the potential board member might need to be effective. Do not argue. Remain positive. Draw the candidate into a conversation about the good work that the organization can accomplish.
- Make board service rewarding. Be sure your organization manages its affairs in a way that helps retain strong board members. Schedule a well-constructed orientation session very early in each board member's term. Bring all strategic issues to the entire board for at least preliminary discussion before referring the issue to a committee. The "too efficient" board meeting devoted only to board reports is nearly as useless as board meetings that meander. Use everyone's time wisely. Devote board meetings to big issues. Let the minutes reflect action items. Maintain forward momentum by running effective meetings.

• Care for your board members. Thank them often. "Ask them what they need to be more effective. Maintain fiscal discipline. Encourage lots of social opportunities. Conduct meaningful meetings. Dream big dreams. And make board membership a positive experience. . . . The rewards for doing so are, as Arnold Schwarzenegger would say, 'HUGE!'" (Weinstein, 2004, p. 57).

Fundraising training, motivation, and the professional's role

Attracting and retaining strong board members and volunteers is one thing. Motivating them actually to make solicitation calls is quite another. A good starting point for thinking about training and motivation is to remind ourselves not to lecture. "Most volunteers and staff members know the answers to their most common concerns. They just don't know they know until a skilled facilitator elicits their concerns and responses" (Weinstein, 2004, p. 185). When asked why people are reluctant to make solicitation calls, most volunteers can quickly come up with the usual list: "Most volunteers don't like to hear *no*. It is natural to fear rejection." "I might not be able to answer questions about the organization." "I'm not comfortable speaking about money or requesting specific pledge amounts." "If I ask Mrs. Smith for a gift, won't she turn around and ask me for the same amount for her nonprofit?" And, "Aren't we annoying people with too many requests?"

After eliciting this list of objections to personal solicitations, the trainer or facilitator can provide the group with the wisdom needed to answer each of these concerns. Typical responses include these: "Don't take it personally. We're not asking for ourselves, we're asking for the organization. So what if some say no?" "Go in a team setting. If you go with a staff member, the odds of answering more questions increases. One can always say, 'I don't know but I'll find out.' Read your presentation materials before each solicitation visit." "Go with someone who is comfortable asking. Have a list of gift opportunities in the appropriate range and say, 'We need gifts at these levels—where do you see yourself participating?' Prepare personalized presentation packages that have explicit and specific request amounts written in a gracious manner." "We're adults. We

can say yes or no to any future requests. Not every relationship has to be on a quid pro quo basis. Just be as generous as you are comfortable when you receive a reciprocal request." And finally, "Actually, most people are not receiving multiple requests. Most nonprofits are not so well organized that prospects are asked to participate in many face-to-face solicitations. Furthermore, prospects and community leaders respect the volunteers and peers who raise funds for charitable organizations. You are not annoying the others. You are earning their respect" (Weinstein, 2004).

Of course, transformational leaders are innovative in their training approaches. They do not "overtrain" team members. (Do we really need to remind our board members, people with above-average social skills, that they should begin the solicitation visit by building rapport?) Gifted facilitators and transformational leaders develop lots of involvement activities. They are students of adult learning theory. They keep it light. They keep it fun. Their fundraising orientation sessions are a joy to behold. Most important, their training inspires confidence and motivates participation in the solicitation process.

Despite the greatest training possible, some volunteers remain reluctant to make their appointments and solicitation visits. To be effective, development directors need to be extremely proactive. They urge their volunteers to make their calls. They say things such as, "While we're together and we both have our date books available, why not call several of your best prospects and see when the three of us can get together," or "While you are out of town next week, why don't I call some of your prospects on your behalf and set up some times that work for you during the following two weeks." Tact helps. So does a sense of urgency. Stay on top of the situation. A successful volunteer fundraiser once said to me, "I like working with you. I've raised more money than I ever have before. You're very good at calling me and kicking me in the pants."

Fundraising training can be enhanced with on-the-job training for volunteers and new board members. Encourage team visits. See that less experienced fundraisers go on calls with successful team members. Soon you will have a larger number of experienced volunteer solicitors who enjoyed their earlier successes. Many will become mentors to the nonprofit organization's ever-expanding pool of effective volunteer fundraisers.

Finally, let me address an issue that is sensitive for all professionals: Is it appropriate for the professional to make solicitation visits? Isn't asking for the gift the exclusive responsibility of the volunteers? Over the years, I have addressed these questions with a number of colleagues. Early on, one successful professional said, "Of course, it's the volunteer's job to ask for the gift. But I like to go on key visits. And if the volunteer begins to mumble, I'll ask for the commitment." Another head of a large university's support foundation said, "Our prospects are all over the country. Moreover, it is difficult to recruit effective volunteers in every region. If we didn't have our major gift officers, quality people who can inspire confidence and ask for the gift, we would not be able to raise the funds needed to sustain the institution." No doubt, the conventional wisdom and years of experience tell us that engaging volunteers with peer relationships with the top prospects is the ideal to which we all aspire. However, most of us will admit that we have rarely if ever seen the conventional model work. We cannot simply recruit a sufficient number of volunteers, give each five presentation packages, and expect them to come back with checks and signed pledge cards. That really does not happen. More likely, the development director is extremely proactive in supporting volunteers in obtaining appointments. High-level staff members accompany key volunteers and occasionally are the ones who ask for the gift. And there are times when the CEO, chief development officer, or major gifts officer goes solo and is responsible for nurturing the relationship and securing the commitment.

Prospect identification and cultivation

To the workaday manager or uninspired director of development, prospect identification could be described as "rounding up the usual suspects." Many never see beyond their current generous donors and a few of the community's most well-known business leaders.

Some do not even know these prospects. I recall saying to a development director, "It's marvelous how generous Mr. Ackerman is." Imagine my surprise when the development director said, "Who is Mr. Ackerman?" I then told her that he was the largest donor to her institution . . . and suggested that she might wish to look at the printouts of the donor records rather than simply monitor aggregate financial data.

Such a conversation would never occur with an experienced resource development professional, or with a transformational leader. Such people know their donors as individuals. They are concerned about their donors' families and well-being. But beyond knowing their current donors and the well-known community philanthropist, gifted professionals go much further in their efforts to identify and cultivate new prospects. They create opportunities for major donors to identify themselves. They have aggressive donor acquisition mail programs. They examine the results. They meet with the people who send in the largest gifts in response to these mailings. Real pros schedule many cultivation gatherings and invite a broad spectrum of community leaders and rising stars to attend. The resource development professionals and key volunteers follow up the written invitations with warm, personal phone calls. Those who accept these invitations are advanced in the prospect management system. They receive follow-up visits. These new priority prospects are offered opportunities to participate in the nonprofit's affairs. They are kept informed. They are kept involved.

Above all, transformational leaders do not have a poverty mentality. They do not focus on scarcity. They recognize that we live in an abundant universe. Even small and relatively modest communities have more wealth than most people recognize. Our colleagues with church campaign experience point to numerous campaigns during which people who were relatively unknown in the larger community made significant financial contributions. I personally have seen numerous gifts ranging from \$30,000 to \$1,000,000 and more from donors who never made it to any secular organization's top prospect list. At the same time, many of the top people in our field can relate stories of how they helped secure

similar commitments from people well beyond the household names that populated their prospect lists. Readers of Thomas J. Stanley's *The Millionaire Next Door* (1996) know that much of our nation's wealth is not highly visible. Many affluent people live modest lives. Although not all of them are philanthropic, many more could be if presented with an opportunity to do something significant to change lives.

So how do successful fundraisers get their larger prospect lists? To be sure, they begin by capturing every name possible. They know the in-house lists backwards and forwards. They make sure to gather and record the names of everyone who interacts with the organization. They meet with board members and key volunteers individually to garner more suggestions. They know that it is not enough to ask the board as a whole to fill out forms or "send in the names of people you think might be helpful." During their face-toface meetings with board members and key volunteers, they politely ask questions: Who are some of your colleagues, friends, or associates who might be interested in our organization? Do you know any leaders in the financial community? What celebrities do you know well? Do you have any acquaintances who might be in the second or third generation of owning their own business? Do you have any lists of affluent people—private school lists, golf club membership, tennis club, or what have you? Would you be willing to go through that list, put a dot next to people you know, and introduce us? What other lists should I try to acquire? Can you help with this? And, who else should I speak to who might be helpful as we identify more prospective major supporters?

One of my favorite questions remains this one: "Who do we know with a net worth of \$20 million or more who might become interested in our organization?" The answers to this question have resulted in more than one seven-figure gift for the organizations that I have been honored to serve. This should not surprise you. During most years, such estates increase by \$1 million or more, just by earning a 5 percent rate of return. In most cases, prospects with this kind of net worth can donate \$1 million with no change in

their lifestyle. Of course, the real labor of love begins once the top prospects have been identified. At that point, great energy is devoted to finding gracious and often creative ways to get and keep the person involved in the organization.

The effort needed to nurture positive relationships with prospective supporters can be the subject of a whole book. For purposes of this chapter, let us just remind ourselves to treat all of those we encounter with the utmost respect. We would do well to get to know our prospects as individuals. Professionals who enjoy hearing oral histories and great stories are good at this. Good development professionals are good listeners. They also know how to throw great parties. Even more important, they know how to bring prospective donors into their organization. The relationships are not transactional. They foster relationships that are genuine partnerships.

Managing for results

Leaders, as well as gifted managers, need to understand and control their time. They cannot be bothered with low-payoff activities. Visionary CEOs remain focused on developing a unified view of their organization's future. They effectively communicate the organization's mission and create buy-in for its aspirations. They spend as much as 40 percent of their time managing upward by building a strong board and maintaining positive relationships with board members. The remainder of their time is spent on strategic issues and high-payoff activities. Many also recognize that they play an important role as community leaders. These CEOs use their volunteer time, as all volunteers prefer, performing meaningful and significant work on behalf of the philanthropic community.

Experienced resource development professionals also think and act strategically. They recognize which of their programs are strong and they build on these strengths, and they also develop a comprehensive approach to resource development. In all probability, they have strong major gifts initiatives, direct mail and phone solicitations, and grantsmanship skills, and it is likely that special events are done with panache. When they conduct annual campaigns or

capital and endowment campaigns, or seek special project support, they meet their goals. In mature offices, a thoughtful and successful planned giving program is also likely.

Of course, all of this would not be possible if these professionals were not also excellent managers. They know what to delegate. They know how to help their staffs identify and execute priority projects. They monitor their time and eliminate time wasters. They find the time to read about and study time management and organizational development. They are curious about other people's management styles and time management methods. These CEOs and resource development professionals instill an interest in these subjects in their colleagues and the volunteers with whom they work.

People who manage for results realize that not every important issue is fun. Some high-priority activities traditionally earn yawns from coworkers and volunteers. Yet, can you imagine running the modern development office without sophisticated software? Dedicated fundraising software is needed to manage the data on which we rely. Used strategically, the information system helps the skilled professional by generating scorekeeping, attention-directing, and problem-solving reports (Weinstein, 2002). Good managers maintain their interest in the information system and remain confident that the data entry is done in an intelligent and consistent manner. They use the reports to make better and timely decisions. Also important, the information system makes it possible for development professionals to maintain positive relationships with numerous top prospects. For some, the words "tracking" or "managing" or "monitoring" relationships conjure up notions of manipulative behaviors. Thoughtful resource development professionals know, however, that the system is merely a tool to help them be more gracious and consistent in their interactions. It allows them to follow up on promises and ensures that they stay in touch with people, even when they are not asking for contributions.

To conclude this discussion of managing, let us look briefly at two issues that plague some of our colleagues: too many special event fundraisers, and office politics tied to turf wars or poor organization structures. The solution to the special events issues is relatively simple. One or two signature events done well can be an important part of the overall development effort. Well-executed, these events have tremendous public relations value. If the organization also focuses on securing generous sponsorships, the events can even net substantial income. Moreover, some volunteers are unlikely to become involved in an organization without such events. However, be cautious not to become part of the nickel-and-dime mentality. Too many events translate to lost opportunities. Strategic thinkers devote a great deal of time to nurturing relationships with top donors and prospects. Their mantra is, "Take a rich person to lunch." Effective fundraisers manage their programs in a way that allows them sufficient time to be out of the office meeting with top prospects.

The issues of office politics, turf wars, and poor organization structures are more difficult to deal with in brief general terms. But here is some advice that might help:

- *Do not fight every battle.* Some issues aren't worth the expenditure of emotional capital. When possible, let others have their way. As one wag once said, "You can't die on every cross."
- *Do not micromanage*. Be prepared to delegate responsibility and authority. Just be clear about the outcomes you expect and sharpen your coaching skills.
- Be prepared to help troublemakers move on. Someone who is unhappy in your organization can cause strife and upset. No matter how well such people perform their major responsibilities, it is wise to remember what one friend, a bank president, once told me, "Eighty percent of everyone's job is getting along with others on the team. If they're not doing that, they're not doing their jobs."
- Stay alert. Know what is happening around you. Recognize the
 issues and points of view that are points of contention. Recognize healthy and constructive conflict. Differentiate these from
 griping, whining, and malicious gossip. Create a corporate culture that brings business differences into appropriate settings for
 discussion and resolution.

- Look carefully at how the organization is structured and be prepared to advocate change. For example, one common concern among many development directors is that people key to their success often report to other department heads. We have all seen data entry personnel (with responsibility for the resource development information system) who report to the finance office. At times, special events and sponsorships personnel report to a marketing director. Some organizations get into trouble because multiple departments submit grant applications to the same funder. One has the choice of either improving the communication among departments or reorganizing the reporting relationships. In all probabilities, a combination of strategies is needed.
- Think Byzantine. Some intrigues transcend common solutions. The astute survivor of office politics figures out who is talking to whom and what they are probably saying. Complex situations might need complex strategies. Examples of such thought and behaviors include seeking to influence the makeup of an important board committee that can become an ally for your point of view; waiting to address an issue until a key stakeholder leaves the organization; and manifesting great loyalty and support of the stakeholder whose support you need. Of course, simple, direct, and adult communication is usually preferred.

Staffing from strength

One of the most impressive leaders I know is Chris Baca, the CEO of Youth Development, Inc. (YDI). The agency started twenty-five years ago as a small social service nonprofit in one of the poorer sections of Albuquerque. Today, its annual budget exceeds \$25 million. The organization is perceived as excellent in its ability to administer government grants. Chris points out that YDI has two core competencies: its unique approach to grantsmanship and its dedication to attracting and retaining top-quality staff. Most of the organization's department heads and key staff have been with the organization for fifteen years or more.

The keys to staffing from strength can be understood by answering four questions: Who to hire? When to hire? How to hire? How to

retain? This may constitute a bit more of the nitty-gritty and a "how-to" discussion than the typical reader of leadership literature wishes to explore. However, I have seen too many organizations fail to thrive because of staffing errors and faulty hiring practices. The following advice is not, therefore, a side issue to transformational leadership. Rather, it is central to the realization of every organization's potential. Let us explore each of these.

Who to bire? The simple answer to this question is, "The best person available." This assumes that the organization will make every effort to be as close as possible to the upper end of the salaries being offered for similar positions. Ideally, the organization should offer highly competitive salaries and benefits. But the central question still is: Who is the "best" person? In short, the best candidates have the following characteristics:

- They have a proven track record of success.
- They have the specific skills, experience, and background needed to fulfill the responsibilities of the job.
- Their personalities and backgrounds are suitable for the work environment. The chemistry is right. Their aspirations fit the organization.
- They are proactive people. They are self-starters who can be trusted to get the job done.
- They have the ability to overcome obstacles.
- They are energetic. Not every successful employee is bubbly or what might usually be associated with the word *enthusiastic*. But successful candidates bring a positive attitude and energy to every situation.

When to hire? There are two answers to this question: Hire a highly qualified person when you need to replace a staff member. Hire additional personnel when you need to expand staff. The critical success factors are knowing if the position, as historically structured, warrants a replacement, and recognizing when it is appropriate to expand staff. If your analysis shows that a person who left was making a positive contribution to the organization and

the investment in that position is prudent, by all means fill the vacancy. However, before you do so, reexamine the reporting relationships and job responsibilities. This might be a good time to make some strategic improvements in the organization.

To justify the investment needed to expand staff, resource development professionals and other leaders need to satisfy themselves and others that the following criteria are met:

- The current staff is well-organized and as productive as possible.
- The current staff is not only productive and devoted to highpayoff activities, but staff members are now experiencing competing deadlines and a workload that is perceived as burdensome.
- There are no low-payoff activities that can be eliminated.
- The additional staff can be demonstrated to produce an economic benefit to the organization. There must be an opportunity cost to not hiring. There must be a demonstrable and significant benefit to be derived from the staff expansion.

One of the common complaints among development directors is that their CEOs and the board directors will not make the investments necessary to create the most effective development office. The problem with this point of view is that it seems to shift responsibility for making the case for investing in resource development to the very people responsible for weighing competing organizational priorities. Making the case for expanded staff is clearly the responsibility of the director of development. To make a convincing case, the development director needs to perform due diligence in ensuring that the criteria are met. Preparing written situation analyses, workload studies, job analyses, income projections, and executive presentations are the last thing one has time to do when the workload is out of control. But there are key times in every organization's development when sacrifices must be made. Keep it simple, but do satisfy yourself that the four criteria are met. Be able to present the information in a compelling manner. Above all, prepare spreadsheets, charts, or some attractive and easily understood presentation materials that demonstrate the return on investment brought about by investing in staff. Be truthful. Make sure that your projections are conservative. And to paraphrase Jerry Maguire, "Show them the money."

Developing accurate projections is a managerial and technical concern. To do this well, fundraisers need to understand the costs related to fundraising strategies. Top professionals should also have the ability to set goals and make projections using a number of quantitative techniques. The simplest way of setting a goal is by analyzing historic data and noting the trends. If net income from direct mail has been increasing by 6 percent to 10 percent annually, for example, it is likely that next year's income will fall in that range. But when talking about additional staff, trend analysis does not get you far. The additional staff is more likely tied to a new initiative or fundraising program expansion. So what kind of techniques might help with projections? One is a name-by-name analysis of the prospect pool. The professional can project increased income in the knowledge that more personal visits will result from increased staff. Two general guidelines are that "the staff should include one development officer for every two hundred prospects capable of contributions of \$25,000 or more," and the major gift officer "should help close at least twenty-five commitments per year. Each commitment should be for not less than \$10,000" (Weinstein, 2002, p. 53). Beyond the name-by-name analysis, the manager making projections might wish to examine comparative statistics. By forming ad hoc alliances with colleagues at institutions similar to yours and becoming familiar with industry group comparative data, your projections and goal-setting skills can be enhanced.

But projecting increased income related to the expanded staff is just the beginning. Also paint pictures of how this increased contributed income will translate into stronger programs and a more robust organization. The money is not the issue. The key question is what the contributed income can accomplish.

How to hire? Search firms can be of great assistance in ensuring that an organization's key positions are filled by the strongest people possible. With or without professional help, taking the following eleven action steps might prove helpful:

- 1. *Perform a job analysis*. It is not enough to understand the tasks associated with the position. It is also helpful to know what relationships with other people are required (reporting relationships, informal contact, advisory roles, and so on). It is also important to know how information flows to and from the employee. The physical environment is relevant to the job analysis too.
- 2. Develop the job description. Be sure you understand what the successful candidate must do. Let the job description also outline all key relationships. There are many models available. However, the goal is not to find the best boilerplate. Rather, strive to find the best template and create the most informative, customized job description for your unique circumstances.
- 3. Implement a thoughtful recruitment strategy. Internal job postings make a positive contribution to the corporate culture. Employee referrals are also helpful. Design an external recruitment strategy that is targeted and strategic. Local newspapers work well for many positions and sometimes generate surprisingly strong candidates for even the most specialized key positions. However, position announcements in the Chronicle of Philanthropy or in targeted trade publications tend to elicit strong applications more consistently. Nearly all sectors of the nonprofit world—museums, symphonies, higher education, independent schools, hospitals, and health care institutions have support organizations, many of which publish trade publications and include job announcement sections. One final thought: do not rely solely on job announcements. Search firms succeed because they convince people who are currently employed and successful in their positions to apply for their openings. Do the same. Be discreet, but determine who you would like to have apply. Honor their confidentiality and make your strongest case to these stars.
- 4. *Screen resumes*. If your job announcement reads, "Send a cover letter and a resume," you can begin your screening by seeing if the applicant followed directions. Screening is not too difficult to do. Most applicants either do not have the necessary back-

ground and experience or do not take the time to customize their resumes so that you will know that they do have the needed skills. In either case, you will not want to hire them. Consensus is not difficult to achieve. Generally, five to seven candidates surface as potential interviewees. At times, more make the first cut. Again, most of the resumes contain fatal flaws: typos, unattractive presentation, unprofessional approach, or—most common of all—inappropriate background.

- 5. Consider a preinterview phone conversation with top applicants. This is not the formal interview but can save valuable time for the top staff, board members, and community leaders who make up the selection committee. During this conversation, the caller can determine if the candidate is available, is still willing to accept the position if offered, has any concerns, or has any problems with the salary range. Once these issues are resolved, the candidate can be invited to the interview.
- 6. Make the interview process work. Ask situational questions. Make sure that the answers paint a picture of how the candidate handled certain challenges in the past. Be sure that the same people participate in all of the interviews. Seek group wisdom and be sure that your interview committee is made up of people experienced in hiring. Also be sure that the committee has at least one person who knows the fundraising field very well. Finally, help each committee member understand what can and cannot be asked. It still surprises me how often I hear people say that they were asked about their religion or age during an interview.
- 7. Consider other selection processes. Testing for proofreading ability may be helpful for a key clerical position. Work simulations, in-basket exercises, and lunches with key volunteers or staff can also be helpful. Just be sure that all final candidates are treated equally. Testing, if employed, must be relevant to the job.
- 8. *Check references*. Really. And while you are at it, confirm the integrity of the resume.
- 9. Negotiate terms with the chosen candidate.
- 10. Write a polite outcome letter to all finalists. If resources permit, also write a polite note to all applicants.

11. Design a meaningful and thoughtful training and orientation process to give all employees the best start possible.

Perhaps the best advice of all is to remember that to attract top candidates an organization must make every effort to offer competitive salaries and benefits. As mentioned earlier, too often, non-profit organizations suffer from a poverty mentality. Some even seem to think that it is wrong to pay people what they are worth. I remember some years ago writing a grant for a client; the funds would be used to pay the salary of a development director. Perhaps the client did not really think that anyone would fund such a request. At any rate, the grant was awarded and the client turned down the funds because, "If we paid anyone that much money, other staff members would resent the expenditure. No one here makes what you applied for." Please do not fall into that kind of a trap. Funds used for top people are truly investments. You cannot get around it: you get what you pay for.

How to retain? Competitive compensation and related benefits are important. Money is a motivator. But Frederick Herzberg, David McClelland, and other researchers point out that job satisfaction has a number of equally significant dimensions (Anderson, 1984). Herzberg points to motivators that include achievement, recognition, the work itself, responsibility, and advancement. McClelland focuses on people's need for achievement, power, and affiliation. His theory is that "when a person has a strong need in one of the three areas, he or she will make decisions and take actions intended to fulfill it" (Anderson, 1984, p. 268).

To retain the strongest staff possible, all employees must know that their work is significant and appreciated. Ed Locke concludes that people want "challenging work that the person can do successfully." They also want "appreciation and acceptance" (Anderson, 1984, p. 272). Boverie and Kroth's concepts of love of work, meaningful work, and nurturing workplace are helpful clues as to the kind of jobs and corporate culture we might aspire to create (Boverie and Kroth, 2001).

A number of problems arise, however, as the development office grows. With a small operation, job enrichment should not be an issue. The two or three people doing the work must be cross-trained and have a range of responsibilities. The development director might be writing grants one day, visiting with major donors the next, supporting the special events committee as it seeks sponsorships, and attending a finance committee and board meeting in between. The data entry person may be called on to help facilitate the direct mail program and provide additional help to the special events committee. You get the picture. Job design may not be a concern, but you do have to remember to say thank you and recognize achievement. Value your colleagues. Be supportive with tools to make their jobs easier. And do not neglect the human dimension.

As fundraising operations grow, the difficulty in maintaining job satisfaction may increase. The positions become more specialized. The grants officer conducts research and writes grants day in and day out. Special events coordinators spend their lives in an interesting mix of sponsorship solicitations and centerpiece selections. Large mail operations employ banks of data entry personnel whose repetitive and detail-oriented jobs suit some but not all. Major and planned gift officers might be called on to travel frequently to visit a steady stream of top prospects nationwide. Sometimes it is possible to find people who just love these jobs. Often, however, it is helpful to create an environment that lets employees know that advancement is possible. Cross-training can also help increase job satisfaction. Again, the critical success factors center on creating a supportive work environment. Get to know your team members as people. Understand their aspirations. As James MacGregor Burns said in his Pulitzer Prize-winning book, Leadership, "Leadership, unlike naked power-wielding, is thus inseparable from followers' needs and goals" (1978, p. 19).

Conclusion

The success of the philanthropic sector is vital to the social fabric of our nation. Indeed, many international problems cannot be solved without Herculean efforts from nonprofit organizations and NGOs worldwide. The problems—whether local or global—are too great for business as usual. Transformational leaders will provide the vision and inspiration needed to address the most serious challenges. To accomplish their tasks, these strong leaders will need equally gifted followers and managers. Personal charisma is not enough. Nor is ordinary managerial competence. To better the lives of people who are served by the philanthropic sector, we would all do well to aspire to be transformational leaders.

References

- Anderson, C. R. *Management: Skills Functions and Organization Performance*. Dubuque, Ind.: William C. Brown, 1984.
- Apps, J. W. Leadership for the Emerging Age. San Francisco: Jossey-Bass, 1994. Bennis, W., Spreitzer, G., and Cummings, T. (eds.). The Future of Leadership: Today's Top Leadership Thinkers Speak to Tomorrow's Leaders. San Francisco: Jossey-Bass, 2001.
- Boverie, P., and Kroth, M. Transforming Work: The Five Keys to Achieving Trust, Commitment, and Passion in the Workplace. New York: Perseus Books, 2001.
- Bradford, D., and Cohen, A. R. *Managing for Excellence: The Guide to Developing High Performance in Contemporary Organizations.* New York: Wiley, 1997. Burns, J. M. *Leadership.* New York: HarperCollins, 1978.
- Collins, J. Good to Great: Why Some Companies Make the Leap and Others Don't.
- New York: HarperCollins, 2001. Crane, T. G. *The Heart of Coaching: Using Transformational Coaching to Create a High-Performance Culture.* San Diego, Calif.: FTA Press, 2001.
- Drucker, P. F. Managing for Results. New York: HarperCollins, 1964.
- Dundon, E. The Seeds of Innovation: Cultivating the Synergy That Fosters New Ideas. New York: AMACOM, 2002.
- Gladwell, M. The Tipping Point: How Little Things Can Make a Big Difference. Boston: Little, Brown, 2002.
- Goleman, D., Boyatzis, R., and McKee, A. Primal Leadership: Realizing the Power of Emotional Intelligence. Boston: Harvard Business School Press, 2002.
- Grace, K. S. Beyond Fund Raising: New Strategies for Nonprofit Innovation and Investment. New York: NSFRE/Wiley Development Fund Series, 1997.
- Greenfield, J. Fundraising Fundamentals: A Guide to Annual Giving for Fundraising Professionals and Volunteers. New York: Wiley, 1994.
- Greenleaf, R. K. Servant Leadership: A Journey into the Nature of Legitimate Power and Greatness. New York: Paulist Press, 1977.
- Hughes, R. L., Ginnett, R. C., and Curphy, G. J. Leadership: Enhancing the Lessons of Experience. Homewood, Ill.: Irwin, 1993.
- Kouzes, J. M., and Posner, B. Z. *The Leadership Challenge*. San Francisco: Jossey-Bass, 1995.
- Seymour, H. Designs for Fund-Raising: Principles, Patterns, Techniques (1st ed.). New York: McGraw-Hill, 1966.

- Stanley, T. J. The Millionaire Next Door: The Surprising Secrets of America's Wealthy. Atlanta, Ga.: Longstreet Press, 1996.
- Tichy, N., and Cohen, E. *The Leadership Engine: Building Leaders at Every Level.* New York: HarperBusiness, 1997.
- Wagner, L. Careers in Fundraising. New York: AFP/Wiley Fund Development Series, 2002.
- Weinstein, S. *The Complete Guide to Fundraising Management*. New York: AFP/Wiley Development Series, 2002.
- Weinstein, S. Capital Campaigns from the Ground Up: How Nonprofits Can Have the Buildings of Their Dreams. New York: AFP/Wiley Development Series, 2004.
- Wheatley, M. J. Leadership and the New Science. San Francisco: Berrett-Koehler, 1994.
- Williamson, P. B. I Remember General Patton's Principles. Tucson, Ariz.: Management and System Consultants, 1979.

stanley weinstein is president of Stanley Weinstein & Co., a consulting firm that specializes in capital campaigns and capacity-building services for nonprofit organizations nationwide.