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SAMPLE CHAPTER

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Delusional : Altruism

WHY PHILANTHROPISTS FAIL TO
ACHIEVE CHANGE

AND WHAT THEY CAN DO TO
TRANSFORM GIVING

FOREWORD BY PAMELA NORLEY
PRESIDENT, FIDELITY CHARITABLE

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You See and Act Abundantly

There's an old saying that goes "You have to spend money to make money." This is true in philanthropy as well as in business. But here's the trick: Money isn't our only tool. We have plenty of other assets at our disposal, such as time, knowledge, relationships, and creativity. Which leads me to my favorite paraphrase of that old saw: You have to act with abundance to create abundance.

You might wonder what I'm talking about, as you seek to find the essential funds and resources required to make life more abundant for the individuals, communities, and institutions you want so much to support. So let's explore how investing in yourself and your organization—and adjusting your mind-set to believe that you are worth this abundance—can in turn lead to abundance for your cause.

I learned this lesson years ago when I worked for a small nonprofit in San Francisco. In those days, the fancy new technology was fax machines! We used fax machines the way many of us use email and social media today—to get out the word quickly to legislators, the media, and our

supporters. Sometimes we would send out several fax alerts a day, trying to mobilize people to do the things we supported and believed in.

Although our finances were tight, our leadership decided we needed to send every dollar possible to our program recipients in Central America. Meanwhile, we ourselves existed in a mind-set of extreme austerity—scarcity, in fact. So, purchasing a fax machine for \$900 was out of the question. Instead, we were instructed to borrow a fax machine that was located 10 blocks away—half a mile—whenever we needed to send out our alerts. At minimum, this process would take about an hour from beginning to end, but it often took much, much longer.

I was oblivious to our scarcity mind-set for quite some time, until a team of us made a trip to Central America to visit with an organization that was a recipient of our funds. When we walked through the door, the first thing I noticed was a fax machine—a huge one that probably cost around \$3,000. I was shocked that this organization—which was relying upon international donations—could afford a fax machine at all, much less one that was so expensive, when we—the people bringing the donations—were spending at least an hour each day borrowing someone else’s.

So, I asked the director of the organization, “How can you afford this?”

He looked at me like I had just asked how he could afford to breathe. “Well, of course we need a fax machine,” he told me. “Sending faxes is vital to our work.”

I realized then that our scarcity mentality had held us back. We didn’t think we deserved to invest in ourselves. And we weren’t paying attention to how much staff time this caused us to waste each day. What could we have accomplished if we spent an hour each day calling potential donors instead of walking 10 blocks to send a fax? I bet we could have raised a lot more money to send to Central America!

As you consider your own situation, think about how your scarcity mind-set hinders talent, stalls creativity, and hijacks opportunity for systemic change. The good news is that there’s a sure way to overcome

a scarcity mind-set: by doing exactly the opposite and adopting an abundance mind-set.

The Abundance Mind-Set

An *abundance mind-set* is a belief that investment in yourself is important, and the more you put into your operation—and yourself—the greater the return. I firmly believe that adopting an abundance mind-set, which is the antithesis of the scarcity mind-set I discussed in Chapter 1, leads to better outcomes and greater change in the world. The greater your abundance mind-set, the greater your impact velocity.

Many people naturally assume that wealthy people, foundation leaders, and celebrities feel abundance. And we assume their mind-set reflects this abundance. After all, they have big money, big ideas, and often big passion. While it's true that they do have an abundance of resources and desire to do good, that doesn't mean that they themselves have a corresponding abundance mind-set. Instead, they often feel guilty about investing in themselves, their organizations, and their philanthropy. They think all their money should go directly to grantees, and not be frittered away on overhead. Their mind-set is one of scarcity, not abundance.

Of course, adopting an abundance mind-set doesn't mean leasing a floor of luxury office suites or flying foundation trustees to exotic resorts. What it means is believing that you not only deserve to strengthen, grow, and improve so that you are best positioned to help others, but that you must. That you can continuously improve, despite adversity. It means investing in the people, technology, operations, and expertise that help you and your team deliver value on your mission—and therefore to the grantees and communities that you serve. You think big.

What does it look like when you have embraced an abundance mind-set? Here are eight sure indicators:

1. **You are proactively generous.** You take initiative to share your time, experience, expertise, reputation, and resources. You regularly ask yourself, "What do we have in abundance that could add value

to this situation?” I’m not talking here about monetary generosity. Sure, you can give a grant. That is generous and important. But you can also open doors for emerging leaders, offer honest advice to a nonprofit struggling through a transition, and take a leadership role in tackling a controversial issue.

For example, philanthropists often conduct research (needs assessments, environmental scans) to determine whether or how to fund a particular issue. Based on the findings, the funder might decide *not* to fund the issue at this time. Philanthropists with a *scarcity* mind-set will keep the research findings to themselves. Often they are fearful of negative repercussions of sharing the information. After all, community members and those interviewed for the research might get mad that the funder decided not to support their worthy cause. Philanthropists with an *abundance* mind-set will be happy to disseminate the findings widely with the field. They have confidence they made the best decision for themselves, *and* they recognize that others can learn from their research.

2. **You have courage to continuously grow and develop yourself.** This can include intellectual, emotional, spiritual, and skills development. You might assume this means investing financial resources to support your development, but it doesn’t have to. Even if you can’t afford to retain an advisor or attend a workshop, there is an abundance of high-quality and free resources that can help you—podcasts, webinars, articles, white papers, and peer networks. Need proof? Just visit my website putnam-consulting.com or the website of any philanthropy-serving organization.

Your abundant growth and development often requires courage. Courage to believe you deserve to grow and improve. Courage to carve out time in your day for your growth. Courage to listen to the opinions of people whose perspectives are radically different from yours (this can be as simple as watching a different cable news channel), because you feel confident in your beliefs *and* realize you can learn from others. Courage to change your beliefs or your philanthropy based on what you learn.

3. **You are resilient.** We know that that society’s problems were not created overnight and nor will they be solved overnight. Tackling these issues likely means testing unproven ideas, taking risks, and

making “big bets.” When you do that, you are likely to fail along the way. Heck, even when we make “safe bets” we might flounder! Abundant philanthropists recognize that the road to social change is full of potholes, unexpected detours, and blown-up bridges. They have a Plan B and probably a Plan C. They can rebound and recover from a loss or failure and learn from the experience. My friend and consultant Richard Citrin, coauthor of the book *The Resilience Advantage: Stop Managing Stress and Find Your Resilience*, explains that resilience is more than bouncing *back* to your previous state: “Resilience is our ability to address our adversities in an effective manner and to learn from them so that we bounce forward and improve on how we handle situations in the future.”¹

4. **You embrace inclusion.** It’s no secret that our world is becoming more polarized and increasingly intolerant with each passing day. You understand that solving entrenched social problems requires that we come together to identify common goals. To develop these goals, we must include voices and solutions across a broad spectrum. This requires an abundance of empathy, trust, and tolerance.

Carly Hare recognizes the need to embrace an abundance of vulnerability and grace in philanthropy. Hare is the executive director of CHANGE Philanthropy, a coalition of philanthropic networks whose vision is to transform and challenge philanthropic culture to advance equity, benefit all communities, and ignite positive social change. “We need to remember that we are all entering conversations about inequities from different places on our life journeys. We need to allow people the grace to be themselves, be vulnerable, feel discomfort, and heal so that together we can have courageous conversations. If we don’t do that, we stay in a delusional state. We stay ignorant,” explains Hare.²

5. **You believe you deserve the best.** I’m not talking about the best luxury yacht or Hermès Birkin bag. I’m talking about believing that you and your philanthropy deserve the best information, ideas, technology, and talent. That that problem you want to tackle deserves the smartest minds and best-equipped organizations to help solve it. That your relationship with your board chair is so important, you both deserve investing your time and effort to strengthen it. That it’s worth spending \$250 extra on that nonstop flight (avoiding

the time-wasting ritual of reviewing dozens of cheaper but longer options), because you know you will accomplish more for your philanthropy if you arrive rested and not exhausted.

You believe you deserve the best because you want to give your best.

I cannot emphasize enough that believing you deserve the best does not *necessarily* mean that you spend money. It could mean that you make sure you get enough sleep each night. It could also mean you want your philanthropic practices to be informed by the best ideas. As part of her effort to better understand food systems and identify opportunities where her foundation could play a role, Mary Anthony, executive director of the 1772 Foundation, contacted a best-selling author and award-winning expert on local food and nutrition to see if he might be willing to answer some questions and share his experience. The author was perfectly willing and ended up spending an hour talking with Mary. The conversation cost her nothing, and her philanthropy was informed by a nationally renowned expert.

6. **You think big.** Think for a moment about what you would like to accomplish through your philanthropy. Now, imagine yourself five years from now. Will you have achieved your goals if you focus on the limitations of your current grant budget? If you busy yourself in never-ending data gathering or copy editing your board meeting materials? If that's all you do, you will not. You realize that if you want to reach your goals over the long run, then you've got to start thinking big right now. This also means thinking about what you can accomplish beyond the confines of your grant budget.

Mitzi Perdue thought big, and well beyond her grant budget. In 2019 she heard Paul Hutchison, founder of the Child Liberation Foundation, talk about how to rescue and rehabilitate survivors of child trafficking. The talk changed her life. She wanted to support his work. But as she sat in the audience, she calculated that by donating to his organization she would need to cut back on her donations to other organizations.

Then she thought beyond her foundation's grants budget.

She thought of a prized possession: a seventeenth-century de Medici Cardinal's desk given to her by her late parents (her father had founded the Sheraton Hotel chain). She realized she could auction

the desk and donate the proceeds. She then wondered if others might have items they would be willing to donate to raise funds for anti-trafficking organizations. Within months, Perdue created the Global Anti-Trafficking Auction. Operating with a mind-set of abundance, she leveraged her contacts to find other wealthy individuals and celebrities willing to contribute. A New York auction house agreed to manage the auction and forgo their commission. That meant people could use the anti-trafficking auction to convert their tangible items to cash for donation without having to pay the usual 20%–25% commission. Perdue secured PBS for production of a 30-minute television show about the event. She arranged for a major hotel chain to display images of auction items and promote the auction at their properties. As of the time of this writing, auction items pledged for donation include a yacht, a building, a sapphire and diamond necklace worn by actress Marlene Dietrich, a 69.7 carat ruby from the early Qing Dynasty, and 12 Imperial banquet plates that belonged to Tsar Alexander II. All because Perdue was willing to think big and beyond her grant budget.

7. **You take prudent risks.** We all know the old saying “Nothing ventured, nothing gained.” Getting a return on your investment requires accepting some amount of risk, and you embrace it. When you make an investment in your grantees, this requires trusting that people will do the right thing with the resources you’re giving them. Instead of obsessing about their overhead or trying to micromanage them, you say, “Here’s money for your planning, or your board development, or whatever you need to do to strengthen your organization. I trust you.” With an abundance mind-set, are you looking at the world through rose-colored glasses? I don’t think so. The more you put into something, the more you get out of it. There are solutions to every problem, but they often require taking chances.
8. **You invest in your capacity and talent, and that of your grantees.** So far, I’ve tried to emphasize that abundance is a belief, a mind-set. Being abundant does not *require* spending money. Now I want to tell you that philanthropists also need to invest financially in themselves to increase their effectiveness and impact velocity. That means you. You also need to invest more in the nonprofits you support—the ones helping you accomplish your mission. Let’s take a look.

Investing in Yourself

Embracing abundance includes investing resources in yourself, your philanthropy, and your organization. You want to power your philanthropy with innovative ideas and top talent. You want expert guidance to navigate your philanthropic decisions. You want your foundation built upon well-oiled systems, useful technology, and agile leadership.

To do that, you need to invest in yourself.

Here are a handful of places where investing in yourself—and your philanthropy—will reap rewards:

1. **Organizational capacity.** When you have limited capacity, it can be hard to think with an abundance mentality. But making a big impact doesn't mean you have to be the biggest funder. Sometimes it means identifying your gaps in operations or knowledge and finding the most efficient way to fill them.

The Heising-Simons Foundation in Silicon Valley was preparing for significant growth over a three-year period due to an influx of assets. This included tripling its staff, tripling its grantmaking budget, and building out new offices to accommodate its growth. CEO Deanna Gomby knew the foundation would need a strong communications function, but at the time the foundation lacked a communication plan and had limited capacity. She enlisted the help of consultants to develop an initial plan, identify options for staffing-up a communications department, develop a communications budget, and provide interim communications support until communications staff could be hired.

2. **Talent.** Think about the talent you need to launch, manage, and grow your philanthropy. This could include in-house staff (a CEO, program officer, or assistant), outside advisors (your philanthropy advisor, impact investment advisors), an organization that provides back-office management (donor-advised fund sponsor or family office), or your trustees. It also includes you.

Now, think about how to obtain top talent, and what investments you might need to make in their success. From your board chair to the administrative assistant, your team could have greater

impact if they had the support, training, and leadership opportunities. This could involve retaining a trusted advisor, increasing program staff's grantmaking authority, eliminating bureaucratic hurdles within your operation, training assistants in customer service and allowing them to resolve problems, developing a pipeline of leadership, or bringing all your outside advisors together to coordinate their approaches to helping you.

You can also pay ongoing attention to diversity, inclusion, and equity within your philanthropy. In their report "The Exit Interview," the Association of Black Foundation Executives identified that many black professionals were leaving jobs in philanthropy because they felt isolated; had limited opportunities for professional-track training, networks, or support systems; and sometimes felt their expertise was not valued by colleagues. They recommended opportunities to "improve career pathways for Black philanthropic professionals in grantmaking institutions and ensure their perspectives are brought to grantmaking decisions."³

3. **Technology.** Remember that fax machine story? The right technology can help your organization communicate more quickly and effectively and reach decisions faster. While it's true that you don't need every shiny new gadget that comes on the market, you and your team do need ready access to technology such as upgraded computers and software; online grant application, grants management, and constituent relationship management (CRM) systems; cybersecurity; and tools for sharing and collaborating. These are not luxury toys but necessary tools to help you create impact. Some innovative foundations are elevating the role of technology in their strategy and grantmaking by embedding technologists into their program teams.
4. **Learning.** Creating a culture of learning in your organization requires a focus on *intentional* learning. That includes sharing knowledge even when there may not be a direct benefit to your organization.

One community foundation gives an annual award to a nonprofit that best exemplifies excellence in management. The rigorous application reviews nonprofit staffing, planning, technology, community engagement, and more. One year, the foundation decided to turn the process inward. They filled out that application themselves

and committed to publishing it as an annual report. That meant publicly admitting areas of weakness. But it also showed their donors, nonprofits, and community leaders they were serious about running a strong organization and were willing to learn and improve.

Investing in Your Partners

Ultimately, every investment you make in yourself is going to benefit your nonprofit partners—and help you implement your strategy and achieve your goals. However, there are a few things you can do to invest in them directly:

1. **Take time to build a trusting relationship with grantees.**

You want your grantee partners to come to you when a problem is emerging or when new opportunities arise. One nonprofit arts organization was using four different Excel spreadsheets to manage donors, attendees, ticket sales, and more—but was too afraid to ask their funders for a grant to create a single database. They worried their funders would think they were poorly managed and stop funding them. So, they hobbled along, wasting time and losing money. They had lots of funders, but none with whom they had a trusting relationship to discuss their true problems and ask for the help they really needed.

2. **Stick with grantees through challenging times.** Changing the world isn't going to happen overnight, and your grantees need your sustained support over a prolonged period of time to create lasting change. Life is probably nerve-racking enough for your grantees without them constantly worrying whether or not you'll still be providing support to them a year—or a month—from now. This is especially the case in challenging times. When Advocates for Children and Youth (ACY) in Baltimore, a longtime nonprofit partner of the Annie E. Casey Foundation, struggled with the departure of its CEO and lost a massive portion of its funding, the foundation decided to stick with them.

The foundation could have held back funding to wait to see what happened during the executive transition. Instead, it intentionally invested in ACY to make the transition a success.

Explained Rafael Lopez, who was at the time an associate director at Annie E. Casey Foundation, “The composition of talent in our field is changing daily. We need to be supporters of organizations that do the hardest work on the ground, and we must recognize infrastructure changes as critical. Our field historically sees professional development as a luxury, but you can’t address the toughest challenges without leaders to drive change.”⁴

3. **Make sufficient investments in your grantees’ infrastructure, organizational capacity, and long-term planning.** This might include providing multiyear funding, paying for the true costs of running programs, and offering core operating support. You can learn more about these approaches and others in Chapter 11, “You Transform Lives.” It does no one any good if your grantees don’t have enough funds to operate efficiently and to effectively pursue their mission and goals.
4. **Support the competition.** There’s generally not a lot of “competition” in philanthropy, but there is in business. Corporate funders express an abundance mind-set when they invest in projects regardless of whether that investment also helps their competition. For example, when Blue Shield of California ended the year with a surplus, it created a \$20 million grantmaking program to support accountable care organizations at 18 California hospitals, health systems, clinics, and physician organizations. They celebrated the fact that it would benefit even their competitor insurance companies. They had their eyes on the prize of serving underserved populations, reducing health care costs, and enhancing the quality of care.⁵

Investing in Philanthropy’s Infrastructure

You might also consider opportunities to strengthen the infrastructure and ecosystem of philanthropy. By this I mean supporting organizations that “provide a necessary support system for amplifying philanthropy’s effectiveness.”⁶ This includes philanthropy-serving membership organizations, professional support organizations, and peer networks. It can also include research and advocacy organizations.

Why is this important? A strong philanthropic infrastructure helps us all to learn and improve, strengthen our capacity, and leverage the experience and funding of other philanthropists. Worldwide Initiatives for Grantmaker Support (WINGS) believes “As philanthropy grows in importance, and extends into new areas of the globe, it is important to ensure that there is an adequate support system to enable philanthropists to take advantage of opportunities and to protect against threats.”⁷ This is especially important in regions of the world where philanthropic infrastructure is still emerging and where there is less political space for civil society.

The Narada Foundation has been a leader in growing philanthropy’s infrastructure in China. They provided a three-year grant to launch the Non-Profit Incubator in 2007, the first incubator of nonprofit organizations in China. Within five years, a substantial number of new grassroots NGOs had emerged and taken root. Narada also co-initiated and funded the China Foundation Forum, where private foundations network and learn from each other. The Forum quickly evolved into a highly influential organization, attracting nearly 1,000 foundation and nonprofit participants at its 2017 annual conference.

“The effects for the sector of supporting infrastructure are multiplied,” explains Yanni Peng, CEO of Narada Foundation. “It encourages new organizations to be set up, builds NPO’s capacity, enhances the sectoral information and data flow, establishes sectoral ethics and standards, strengthens networks at various levels, and is an advocate for a better legal and regulatory framework.”⁸

How Will You Know If You Are Embracing an Abundance Mind-Set?

As you adopt these practices, how will you know when you and your organization are successfully making the transition from a scarcity mind-set to an abundance mind-set? When you or the people in your

organization have an abundance mind-set, you'll routinely hear questions and statements like this:

- Who are the top experts in the country (or world) who can advise us?
- How much more impact can we have if we add additional capacity to our funding initiative?
- Who are the best people we can get and what is the most strategic use of their time?
- If our program was to become a national model, what would that look like? What can we put in place now to accomplish that?
- If we really want to make a difference on this issue, we need to make a multiyear commitment (because we understand that change takes time).
- What tools, resources, or technology will help our grantees become more effective?
- Let's magnify our impact by leveraging relationships and partners.
- It's OK if our corporate funding initiative also benefits our competitors. It will improve outcomes for everyone, and we will learn a lot.
- Let's survey our grantees to better understand their experience with us so that we can improve.

Once you start hearing comments like these, and seeing the improved outcomes they lead to, you'll wonder how you ever managed in the "bad old days" of a scarcity mentality. And as your abundance mind-set becomes strong, you'll know the value of the standard airline advice to "Put your own oxygen mask on first." You can't help others unless you help yourself.

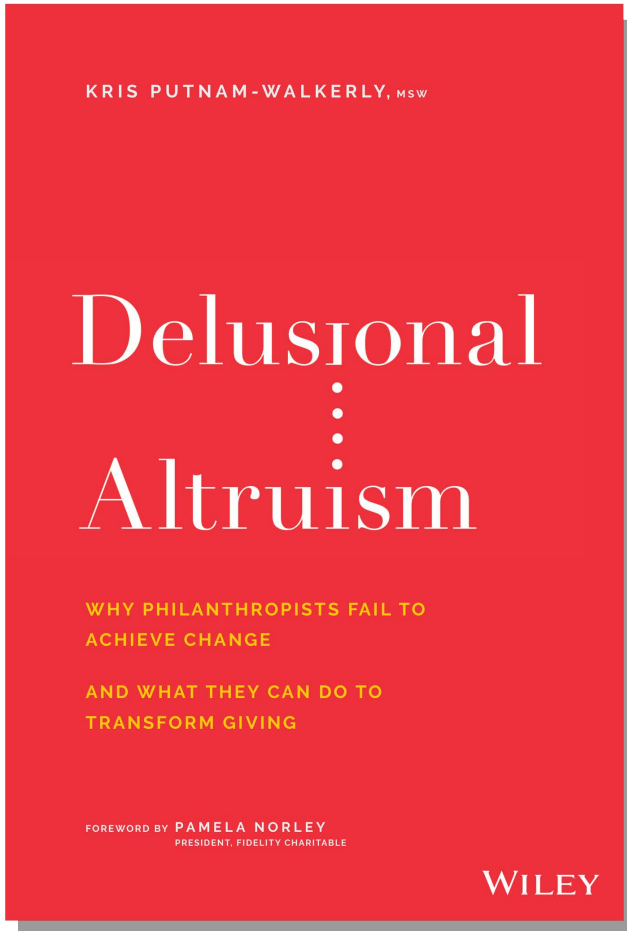
Notes

1. Richard S. Citrin and Alan Weiss, *The Resilience Advantage: Stop Managing Stress and Find Your Resilience Business* (New York: Expert Press, 2016).

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