ABSTRACT

Title of dissertation: Relationship Management and Member Retention:
                                              A Case Study of an Advocacy Organization

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A case study of a grassroots advocacy organization was conducted to test and

expand relationship theory and to explore perceptions about the relationship between

members and the organization. The case study included interviews with 39 staff members

at national, state, and affiliate levels; 58 members; and 5 former members, for a total of

102 participants. Additional methods included 49 hours of participant observation and an

examination of both internal and external documents. The primary relationship type

between the organization and its members was communal, and strategies were presented

to cultivate communal relationships. This study empirically justified the critic's

perspective for classifying relationship types due to one case in which three relationship

types emerged, depending on whether the former member's, affiliate staff member's, or

my interpretation was used, which also resulted in a new relationship type. Due to these

differences in perceptions, this study used the terms *intended* and *perceived* when

identifying relationship types, which is a clarification for future studies to use.

Cultivation strategies were organized in a new way by classifying them as either organizational management strategies or as interpersonal strategies. This study also discussed cultivation strategies by characterizing some as particularly important to either the early stage of the relationship or to the mature stage of it. Several new cultivation strategies were presented, such as priming, problem parking, and insulation. This study also opened a new area for relationship theory through a conceptualization and exploration of relationship stresses. This category is organized by stresses that are internal to the organization and those that are external to it. Examples of relationship stresses include the emotion tax, relationship speeding, and relationship stalling. Cultivation strategies are suggested for mitigating relationship stresses. In addition, this study produced significant insights outside of the research questions by identifying new relationship outcomes, such as co-production, and by claiming capacity to be a higher goal than survival for systems theory. Furthermore, this study clarified the difference between an advocacy and an activist organization. This study also provided rich insights for public relations practitioners, such as presenting strategies to diversify an organization's membership.

RELATIONSHIP MANAGEMENT AND MEMBER RETENTION: A CASE
STUDY OF AN ADVOCACY ORGANIZATION

By

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DEDICATION

I dedicate this dissertation to my parents, Brenda and Bill, Aunt Pamela, and my great grandfather, Daddy D. I love you dearly.

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I give my thanks to God for his love and strength. I am grateful for Dr. Linda Aldoory's mentorship, guidance, and support. I feel honored to be her advisee. She played a major role in structuring and strengthening the conceptualization. She taught me how to structure a study and how to build theory. I thank my dissertation committee members for training me throughout my graduate education and for lending their insight and guidance. I have learned from their wealth of knowledge in public relations, qualitative methods, and rhetorical criticism, and they have sharpened my thinking. I thank Dr. Seung-kyung Kim for her insight regarding conflicting interests in social movements. I also appreciate her interest in the organization's culture and atmosphere. I am grateful to Dr. Jim Klumpp for showing me the importance of identity and energy in social movements. He also pointed me to an abundance of rhetorical criticism about social movements and mentored me through an independent study. I thank Dr. Mari Boor Tonn for teaching me the value of a historical perspective and for recommending helpful theoretical information. I thank Dr. Elizabeth Toth for her social support and for her extensive editing of the dissertation. In addition, I thank Dr. Lauri Grunig, who is a visionary to me. I am also grateful to have had the opportunity to work with Dr. Jim Grunig.

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CHAPTER ONE: INTRODUCTION

Many public relations scholars believe that the goal of U.S. public relations is to establish and cultivate mutually beneficial relationships with the people an organization significantly influences and the people who have an impact on it (L. A. Grunig, J. E. Grunig, & Dozier, 2002; Spicer, 2007). The most widely used U.S. public relations textbook defines public relations as relationship management (Cutlip, Center, & Broom, 2006). According to this relationship management perspective, an organization's livelihood depends on its ability to enjoy mutually satisfying relationships (Ledingham, 2003). Scholars have connected relationship evaluations with customer retention, employee retention, and quick recoveries from crises (Ledingham, Bruning, & L. J. Wilson, 1999; L. J. Wilson, 2000; Yang & Mallabo, 2003). A public's opinions about the relationship it has with an organization affect its satisfaction with the organization (Bruning & Ledingham, 1999), its intentions (Bruning & Ralston, 2001), and its actions (Bruning, 2002).

More than 20 years ago, M. A. Ferguson (1984) suggested relationship management as a paradigm to guide the generation of public relations theory, which has been a productive focus for many public relations scholars. The public relations field is on solid footing in its path to developing relationship management theory. It has produced empirically valid definitions of an organization-public relationship, relationship antecedents, relationship strategies, and relationship outcomes that people can use to evaluate relationships (e.g., Broom, Casey, & Ritchey, 2000; Hon & J. E. Grunig, 1999; J. E. Grunig & Huang, 2000; Ledingham & Bruning, 1998). However, much remains

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unknown about relationship management, and even less is known about how it operates from the perspective of advocacy organizations.

This study was focused on developing relationship theory because relationship theory is central to the public relations discipline. Heath (2001) stated, "The heart of the new view of the practice of public relations is… mutually beneficial relationships" (p. 3). Thus, the theoretical framework of this study reflected this focus of the public relations discipline. Theoretical concepts explored in this study include relationship types, relationship strategies, and relationship stresses.

<center>Justification for an Advocacy Organization Context</center>

This study applied relationship management theory to an advocacy organization because scholars have identified the need for additional research on public relations from the perspective of advocacy organizations[1]. Demetrious (2006) stated, "Mainstream public relations literature … provides only limited attention to activists' use of public communication" (p. 100). Moreover, scholars argued that conventional recommendations for public relations are inappropriate to activists (Dozier & Lauzen, 2000; Rodino &

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[1] I applied the public relations literature about activist organizations to advocacy organizations. Public relations scholars (e.g., Heath, 2001) commonly use the terms *activist organization* and *activist group* as categories that include advocacy organizations. By drawing assessments that apply to both advocacy and activist organizations, most public relations scholars implied the use of *activist organizations* as an umbrella term that includes *advocacy organizations*. The lack of clear terms is evident when comparing a public relations study that called Greenpeace an *activist organization* (see Murphy & Dee, 1992) with a public relations textbook that called it an *advocacy organization* (see Wilcox & Cameron, 2006). The use of the term *activist organization* did not withstand application in this study; consequently, I clarified the confluence of terms later in this chapter. In the discussion of the literature, I used the terms scholars wrote, so readers can judge whether they believe the terms were used generically. Disagreement with this interpretation only makes this study more salient, because I only found three public relations studies (Barnett, 2005; Motion & Weaver, 2005; Nordhoff & Downes, 2003) that used the term *advocacy organization* or *advocacy group*.

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DeLuca, 1999, cited in Sha, 2005). Scholars identified the need for building public relations theories in the context of activist organizations (Dozier & Lauzen, 2000; Feinglass, 2005; Smith & D. P. Ferguson, 2001; Reber & J. K. Kim, 2006). M. Taylor, Kent, and White (2001) said that activist organizations have "unique communication and relationship-building needs" (p. 264). Feinglass (2005) wrote, "The mind-set of supporters and professionals alike – that they are engaged in fulfilling a significant mission, as opposed to increasing a corporate bottom line – influences the choices that are made and how those choices are implemented" (p. 7). Building public relations theory and testing existing theory in the context of an advocacy organization stretches conventional public relations thinking.

In addition to the need for more research from an advocacy organization's perspective, scholars should study advocacy organizations because the organizations typically promote ethical conduct in companies and governments (Demetrious, 2006; Hansen-Horn, 2001; Kovacs, 2003). Karlberg (1996) stated, "Active publics are important *initiators of* (rather than targets for) public relations programs because they are most likely to be aware of and concerned with what *organizations are doing*" (p. 272, italics in original). For example, the Center for Science in the Public Interest (2007a, 2007b) played an instrumental role in pressuring the food industry to reduce trans fat and use clear nutrition claims. In this case, the increased accountability, which resulted from this advocacy organization's efforts, helps people live longer, healthier lives – particularly for people who have the worst nutrition. By studying advocacy organizations, scholars help explain and highlight organizations that improve society through their watchdog role.

Advocacy organizations not only perform a watchdog role, but they also contribute to a vibrant democracy. Holtzhausen (2000) stated that people who engage in resistance "are often portrayed as the enemy of organizations and government, although they are actually … voices of democracy" (p. 100). Societies best function through an open competition of ideas, which means that they depend on people to argue for their varying visions of how the world should operate (Heath, 2001). Advocacy organizations give collective amplification to individual voices. They give individuals efficacy to make a difference in a society of complex problems and well-funded actors.

Advocacy organizations could feasibly push companies and governments to utilize the management role of public relations (L. A. Grunig, 1992). Berger and Reber (2006) stated that a lack of power in the public relations role is a common problem; encouraging a management function for public relations leverages public relations as a discipline and justifies the inclusion of a public relations practitioner in executive decisions (J. E. Grunig & L. A. Grunig, 1997; Hon, 2007). The turbulent environments and multiple stakeholders that are typical of advocacy organizations could pressure organizations to use public relations management.

This study responded to the need for theoretical exploration into advocacy organizations in the public relations discipline. In addition to this need, building and testing theory in the context of an advocacy organization has intrinsic value to society by helping advocacy organizations. Due to these reasons and the centrality of relationship theory to public relations, this study investigated how relationship theory operates in the context of a health advocacy organization, which is referred to in this study by the fictitious acronym HAO.

Justification for a Member Relations Focus

In past work, authors have identified member and volunteer relations as an area

that needs more research (Smith & D. P. Ferguson, 2001). Based on a study of the public

relations function in 21 nonprofit organizations, Dyer, Buell, Harrison, and Weber (2002)

said, "[M]ore work needs to be done in clarifying the public relations role in volunteer

management" (p. 13)[2]. Morton (2006) also recognized the importance of public relations

efforts with volunteers. She noted, "[T]o be successful, practitioners must understand

their target public of …volunteers" (p. 42). Reber and J. K. Kim (2006) added, "Effective

activism is dependent on building relationships among people of like mind" (p. 313).

Thus, several public relations scholars have called for research about member relations in

advocacy organizations.

In particular, the need to study member relations within advocacy organizations is

theoretically justified through systems theory[3], which is central to understanding

advocacy organizations (J. Klumpp, personal communication, September 9, 2005). As

explained by Katz and Kahn (1978), organizations depend on energy, such as money and

effort, to maintain themselves and to prevent entropy. Organizations can achieve negative

entropy by taking in more energy than they spend. For example, organizations can

achieve negative entropy by storing energy financially for hard times. Cycles of events,

which moderate member relationships, can result in gaining or losing energy. Without

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[2] Dyer et al. (2002) did not investigate strategies for volunteer management; they only identified volunteer management as a public relations responsibility.
[3] While acknowledging the importance of systems theory, J. E. Grunig and L. A. Grunig (2000) critiqued systems theory as an overall framework for public relations by commenting that survival is "an extremely weak goal" for public relations practitioners (p. 306). See Murphy (2007) for a contemporary discussion of systems theory in public relations.

continued energy, an organization breaks down. Human effort is the most critical maintenance source. Katz and Kahn stated, "The carriers of the system…furnish the sustaining inputs" (p. 3). Recruiting members typically costs more energy (through effort and resources) than retaining them does (see Briscoe, 2002), so systems theory theoretically justifies member retention as an important area.

This study helped fulfill the need for research about member relations by using relationship theory to investigate the relationship between one advocacy organization and its members. Identifying the nature of the relationship with members, strategies to cultivate the relationship, and stresses that strain the relationship represent a significant endeavor to enhance both public relations scholarship and practice.

Nomenclature

Terms important to understand for this study include *advocacy organization*, *grassroots*, and *member* and *former member*. Literature within and outside public relations was used to support the explanations below. In addition, comments from an informal interview with a senior executive from HAO helped distinguish the comments from HAO's perspective.

Advocacy Organization

HAO rejected the public relations literature's label of *activist organization*, asserting that this term suggests radical tactics[4], such as "tree spiking." Consequently, I distinguished between *advocacy organization* and *activist organization* and used Connors' (2000) discussion to do so. He stated:

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[4] For a discussion of radical activist tactics, see Derville (2005).

Activism is defined as theory, doctrine, or practice of assertive, often militant

action, such as mass demonstrations or strikes, used as a means of opposing or

supporting a controversial issue, entity, or person. Activist methods are direct,

noticeable, public and militant. They are used to call attention to an issue and

often to shame, embarrass and create negative public opinion toward people with

decision-making authority. (para. 2)

There are several types of activist organizations (Derville, 2005; Smith & Windes, 1975).

Radical activist organizations are more fundamentalist than mainstream activist

organizations and are more likely to demand changes that policymakers view as

unrealistic (DeLuca, 1999). Activist organizations also differ in their strategies. For

example, an activist organization that uses both militant and moderate strategies is known

to use an intermediate approach (Simons, 1970). In addition, some activist organizations

are exclusively self-directed by focusing on social change for themselves, such as a

women's rights organization, and other activist organizations are other-directed by

advocating for the rights of others, such as pro-life organizations (Gregg, 1971; Stewart,

1999; Windt, 1972).

Distinguishing *activism* from *advocacy*, Connors stated:

Advocacy, on the other hand, is the process of committing continuous, proactive

support to an idea, person, or cause to bring about sustainable, long-term change.

Advocacy seeks to bring about immediate changes to ensure a responsive strategy

for emerging or potential challenges. (para 3).

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Based on Connors and wording from Simons[5] (1970), people can classify organizations that seek social change along a continuum. People who form a group for social change and use militant tactics to achieve their goals represent an *activist organization*. People who form a group for social change and solely use moderate tactics to pursue their goals represent an advocacy organization. Prior to the study, I distinguished an activist organization from an advocacy organization by whether the organization sought systems change, regardless of its methods for doing so. Thus, the Girl Scouts would be an advocacy organization, while the organization I studied, which wants to change the health care system, would be an activist organization. Nevertheless, I respect HAO's choice to self-identify as an advocacy organization, and I located scholarly literature to support the decision. Furthermore, HAO's choice to identify with advocacy rather than activism could facilitate its efforts to engage members in political change. Many people do not join HAO for political change, at least not at first. The term *advocacy* is arguably a more inviting way to enter political involvement than the term *activism*, which implies doing things that may upset others.

This study's definitions are intended to replace the two commonly cited definitions for *activist organization* by L. A. Grunig (1992) and Smith and D. P. Ferguson (2001). L. A. Grunig (1992) defined an *activist organization* as "a group of two or more individuals who organize in order to influence another public or publics through action that may include education, compromise, persuasion, pressure tactics, or force" (p. 504). This definition did not fit this study because it included advocacy organizations, and the organization in this study, in addition to outside literature (e.g., George, 2004;

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[5] Simons used the terms *moderate* and *militant* to differentiate between types of strategies that activist organizations use.

Verna, 2000), differentiated between the two. Smith and D. P. Ferguson's (2001) definition was even broader than L. A. Grunig's conceptualization. Citing a conference paper by Smith (1997), they defined an *activist organization* as a group whose "primary purpose is to influence public policy, organizational action, or social norms and values" (p. 292).

Grassroots

To characterize the type of advocacy organization in this study, an explanation of *grassroots* is needed. The conceptualizations I found for *grassroots* (e.g., Kalpagam, 2002) were loaded with demographic information that did not fit HAO. Consequently, I referred to the *Random House Unabridged Dictionary's* (2007) definition, which defined grassroots as "involving the common people." Melding this definition with the statements by a HAO executive, *grassroots* means here an inverted pyramid structure in which action and ideas largely originate at the local level. The local level wields significant influence in state and national decisions. Although all levels support one another, the current of support primarily flows to the local level. For example, in this study, the national organization supports the state organizations, and state organizations support local affiliates.

Member and Former Member

This study found that the most appropriate definition for member and former member derived from the discussions with the HAO executive. A *member* of an organization participates in it through contributions, such as advocacy, dues, donations, participation in meetings, or volunteer work. A *former member* is someone who used to contribute to the organization but no longer does so.

Goals of the Study

This study had two goals. The first goal was to study the perceptions of the relationship that exists between members and their advocacy organization. This goal included an examination of why former members ended their participation. The second goal was to assess the utility and expansion of relationship management theory by analyzing one advocacy organization's relationship with members and former members. I used case study method because it was ideal for pursuing an in-depth, holistic understanding through the use of several approaches (Feagin, Orum, & Sjoberg, 1991).

Summary of Concepts Studied

The key concepts in this study included relationship types, cultivation strategies, and relationship stresses. *Relationship types* refer to the quality of a relationship (J. E. Grunig, 2002). They were identified by asking the staff about their motivations for helping members in the relationship, such as helping out of genuine care for someone or helping to cultivate a favor from a member, such as volunteer work. In addition, relationship types emerged from asking members and former members whether they thought that the organization genuinely cares about them and why or why not. Follow-up questions were used to test other relationship types.

The second concept, *cultivation strategies*, refers to methods for building relationships (J. E. Grunig, 2002). To explore this area, staff members shared their strategies for cultivating relationships with members. In addition, members identified how the organization builds relationships with them. Both parties responded to questions about relationship outcomes, such as trust, and were then asked to explain how the organization did or did not achieve each outcome.

The third concept, *relationship stresses*, is a theoretical concept that this study introduced to the public relations literature. It refers to the factors that constrain organization-public relationships. The term was derived from J. E. Grunig's (2002) definition of cultivation strategies, which mentions "stresses" (p. 5). When members stated that they had decreased their involvement in the organization, they were asked to explain why. In addition, former members were asked why they left the organization.

Delimitations

Significant delimitations were made due to time and financial constraints. With more than 1,000 affiliates, 50 state organizations, a national organization, and an organization in another country, I could not talk with people who represented every HAO organization or even every HAO region. Instead, I focused on HAO National, in addition to state and affiliate staff, members, and former members in one state. HAO National and staff of the HAO state organization that was studied agreed that their relationship is particularly strong. Thus, this study represented one slice of HAO's relationship with members and former members. Another delimitation was that I could only interview HAO members and former members who decided to call my toll-free number to participate. This might have limited the kinds of members and former members who were represented in this study.

Significance

This study was significant because it explored undeveloped territory in relationship management, which resulted in theoretical and applied insight. Holtzhausen (2000) noted that most public relations scholars conduct studies about activist organizations from the perspective of targeted organizations (e.g., L. A. Grunig, 1986,

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1987, 1992; Kovacs, 2001). Few public relations studies have examined the publics' side of a relationship, and even fewer have focused on an advocacy organization and one of its most important publics: members. In Cutlip, Center, and Broom (2006), Bowen stated that internal publics are the most important people to an organization (p. 222).

A review of public relations literature produced only 10 studies that focused on an advocacy organization's relationship with its members. Two studies developed psychographic profiles of volunteers and concluded with recruitment suggestions for nonprofit organizations (Dutta-Bergman, 2004; Morton, 2006). A third study identified antecedents to joining activist organizations (J. E. Grunig, 1989). A fourth study examined the use of online action alerts to engage people who would otherwise be too busy to participate in activism (Alex, 2003). A fifth study consisted of a one-page description about conflict management from an undergraduate case study book (Guth & Marsh, 2005). The sixth and seventh studies were delimited to textual analyses of message strategies (E. L. Collins, Zoch, & Walsh, 2005; Reber & Berger, 2005). O'Neil (2007) and Waters (2006) provided the eighth and ninth studies, which explored donor relationships with nonprofit organizations. In addition, Nordhoff and Downes (2003) presented a conference paper in which they addressed member recruitment and communication; however, their focus was on the various public relations functions in nonprofit organizations, so only two of their 10 protocol questions investigated relationship management with members. Of these studies, only four used qualitative methodology other than document analysis (see Alex, 2003; J. E. Grunig, 1989; Guth & Marsh, 2005; Nordhoff & Downes, 2003). Of these four, none examined relationship types or relationship stresses.

Therefore, a considerable chasm exists in research on advocacy organizations and their relationships. This dissertation research was an attempt to fill this chasm through an exploration of the types of a relationship an advocacy organization has with members and former members, strategies for cultivating the relationship, and stresses to the relationship. These concepts were explored through the perspectives of the organization's staff, members, and former members.

This study resulted in building public relations theory, in addition to enforcing and refining existing literature. This study's findings showed how relationship theory, including new theoretical results, could apply to an advocacy organization's relationships with members and former members. Results are most likely to illuminate an understanding of advocacy organizations that share commonalities with the one in this study by having a grassroots culture and layers of leadership, such as local, state, and national offices. This study's investigation of relationship types was significant because it resulted in a new way to label relationship types, it empirically justified the role of the critic in identifying relationship types, and it presented a new relationship type. It also identified strategies for cultivating communal relationships. In addition, this study produced new cultivation strategies for the public relations literature. It offered a fresh perspective by conceptualizing strategies as particularly important for either the early or mature stage of the relationship. This was also the first study to label the use of favor as a strategy that is used in the United States. Furthermore, this study broke ground by contributing the category of relationship stresses to relationship theory. It identified external and internal stresses and complemented them with cultivation strategies to respond to them.

This study was also significant for the contributions it made that fall outside of the research questions. It was the first public relations study to identify capacity, co-production, and agility as organizational outcomes. It was also ambitious in its proposal to redefine the goal of systems theory to be capacity, rather than survival. Moreover, this study produced justifications from the field for the value of relationship management and specifically, member retention. Furthermore, it distinguished between advocacy organizations and activist organizations.

Organization of the Dissertation

In the second chapter, a theoretical framework is provided for this study. Research areas described include organization-public relationships (e.g., Hon & J. E. Grunig, 1999; J. E. Grunig & Huang, 2000; Hung, 2002; Ledingham & Bruning, 2000; Plowman, 2007) and advocacy organizations (e.g., Connors, 2000; J. E. Grunig, 1989; L. A. Grunig, 1992; Smith & D. P. Ferguson, 2001; Nordhoff & Downes, 2003). The chapter concludes with the research questions.

Methods involved in this study are addressed in the third chapter. A qualitative case study of HAO was conducted. Topics presented in this chapter include an explanation of qualitative methodology, data collection procedures, data analysis procedures, and ethics.

The fourth and fifth chapters represent the study's results and conclusions. Answers to the research questions are located in the fourth chapter. Excerpts of data, primarily from interviews and occasionally from participant observation experiences or documents, provide evidence for each theme that answered the research questions. The fifth chapter contains theoretical and applied insights based on the results. New elements

to public relations theory are introduced, and the existing public relations literature is

elaborated. In addition, future research is suggested.

CHAPTER TWO: CONCEPTUALIZATION

In this chapter, I describe existing theory. I begin by defining public relations and characterizing relationship management as a framework for public relations research. Included within this overarching understanding of relationship management is a description of organization-public relationship theory. The theory is defined by relationship antecedents, strategies to cultivate relationships, and outcomes of relationships, all of which are described below. Then, I examine the literature on advocacy organizations, which includes discussions of the antecedents to joining advocacy organizations and the retention challenges advocacy organizations face. The chapter concludes with the research questions.

Public Relations and Relationship Management

J. E. Grunig and T. Hunt (1984) defined *public relations* as "the management of communication between an organization and its publics" (p. 6). I selected J. E. Grunig and Hunt's definition because it best encompasses a wide range of public relations practices. J. E. Grunig and Hunt defined *publics* as people who influence an organization. J. E. Grunig and Repper (1992) explained that organizations select *stakeholders* through their marketing strategies and plans; however, *publics* choose an organization by directing their attention to it when situations that interest them arise. Spicer (2007) extended this definition by arguing that organizations have a primary duty to people an organization endangers who lack power to respond. J. E. Grunig (1992) excluded Spicer's idea from his definition because he operates from the belief that publics at risk have enough power to engage in activism, have powerful third-party advocates, or both.

Thus, public relations involves both publics who influence an organization and publics who an organization influences. People often fit both categories.

M. A. Ferguson (1984) drew scholars' attention to relationship management through an invited paper she delivered for the Association for Education in Journalism and Mass Communication. She recommended that public relations specialists focus on the relationships that organizations share with their publics. M. A. Ferguson also argued that a relationship management paradigm would enrich public relations scholarship. She envisioned that relationship management would result in integrating knowledge from various fields, studying relationships with publics at macro and micro levels, and introducing new methodologies.

Numerous scholars, particularly in the United States, have adopted M. A. Ferguson's (1984) recommendation by agreeing that a primary public relations goal is to establish long-term, mutually beneficial relationships (e.g., Cutlip et al., 2006; Ehling, 1992; L. A. Grunig, 1992; Heath, 2001; Hon, 1998; Ledingham & Bruning, 2000). Bruning, DeMiglio, and Embry (2006) found that mutual benefit "(a) provides a competitive advantage, (b) is influenced heavily by respondent organization-public relationship perceptions, and (c) is an outcome that is specific, measurable, and unique to public relations" (p. 38). Hon and J. E. Grunig (1999) stated, "Public relations makes an organization more effective…when it identifies the most strategic publics as part of strategic management processes and conducts communication programs to develop and maintain effective long-term relationships between management and those publics" (p. 12). J. E. Grunig (2006) noted that since the completion of the excellence study, public relations scholars have focused on the relationships between an organization and

its publics more than any other topic.

The excellence study was a groundbreaking research project in public relations (Dozier, 1995; J. E. Grunig, 1992; & L. A. Grunig, J. E. Grunig, & Dozier, 2002). J. E. Grunig, L. A. Grunig, and Dozier conducted this 15-year study with more than 300 organizations in three countries and a $400,000 grant from the International Association of Business Communicators. The researchers identified best practices in public relations. Toth (2007) provided a follow-up book about excellence challenges for the next generation.

Organization-Public Relationship Theory

The term *organization-public relationships* refers to the relationships that an organization has with its publics. Broom et al. (1997) said that scholars need to define *organization-public relationships* to advance theory building in this area and to enable public relations practitioners to properly measure relationships. Based on research conducted in a graduate research seminar, they addressed relationship scholarship from the following disciplinary areas: interpersonal communication, psychotherapy, interorganizational relationships, and systems theory. They criticized scholarship in these areas for assuming that the concept of a relationship does not require a definition. They also criticized researchers for confusing the characteristics of people who are in relationships with the characteristics of the relationship. In addition, they disapproved of describing relationships by the factors that precede relationships and by the outcomes that result from relationships. Finally, they criticized scholars for thinking that the opinions of people in a relationship refer to how relationships actually are. Although personal

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interpretation prevents an accurate depiction of reality, a third party can provide an illuminating perspective.

Broom et al. (2000) defined *organization-public relationships* in the following three ways. Organization-public relationships involve repeated experiences of interaction, linkage, and exchange of information, energy, and resources. They have characteristics that participants do not necessarily perceive. Although organization-public relationships evolve, people can discuss them at a single moment and monitor them over time.

J. E. Grunig and Huang (2000) took existing public relations literature from the excellence study, Huang's (1997) dissertation, and other sources and positioned it within a relationship management framework. They filtered this literature into antecedents, cultivation strategies, and outcomes for organization-public relationships.

Relationship Antecedents

Relationship antecedents consist of the reasons why organizations and publics form relationships with each other (e.g., Broom et al., 2000; J. E. Grunig & Huang, 2000; Thomlison, 2000). Broom et al. (1997) stated that antecedents cause tension in environments, which results in organizations and publics adapting to pressure by forming relationships. J. E. Grunig and Huang (2000) stated that organizations form relationships with publics when they have behavioral consequences on groups of people and when groups of people have behavioral consequences on them. Rhee (2004) and Yang (2005) found support for this description. Broom et al. (2000) identified the following antecedents to an organization's formation of relationships with publics: "social and cultural norms, collective perceptions and expectations, needs for resources, perceptions of [an] uncertain environment, [and] legal/voluntary necessity" (p. 16).

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Application of J. E. Grunig's (1989, 1997) situational theory of publics also illuminates the antecedents that lead people to form relationships with organizations. The situational theory has three variables: problem recognition, constraint recognition, and involvement. *Problem recognition* refers to the extent to which people perceive an issue to be a problem and stop to think about what should be done about it. *Constraint recognition* describes the degree to which perceived barriers prevent people from taking action. *Involvement* includes the extent to which people recognize a connection between themselves and an issue. People with high problem recognition about an issue, low constraint recognition for responding to it, and high involvement for the issue are considered to be active publics and are likely to form relationships with organizations.

Cultivation Strategies

J. E. Grunig (2002) defined *cultivation strategies* as "the communication methods that public relations people use to develop new relationships with publics and to deal with the stresses and conflicts that occur in all relationships" (p. 5). Scholars developed cultivation strategies for building long-term, mutually beneficial relationships (Ledingham & Bruning, 1998; Hon & J. E. Grunig, 1999). Cultivation strategies are not mutually exclusive. For example, Hon and J. E. Grunig (1999) presented *positivity* as a strategy that organizations can use to cultivate relationships by providing "anything…to make the relationship more enjoyable for the parties involved." (p. 14). They provided an example of a CEO who used the strategy by making a Web site and newsletter as valuable to publics as possible. The CEO could have attempted to make these resources valuable by including information to help publics solve their problems, which is another strategy called *task sharing*.

Cultivation strategies are described in the ensuing discussion, which begins with access (Hon & J. E. Grunig, 1999), openness (Hon & J. E. Grunig, 1999; Ledingham & Bruning, 2000), symmetric communication (J. E. Grunig, 2001), and dialogue (Kent & M. Taylor, 2002). The examination continues with the strategies of positivity (Hon & J. E. Grunig, 1999), consubstantiality (Burke, 1950; Esposito & Koch, 2000), constitutive rhetoric (e.g., Stewart, 1997), and networking (Hon & J. E. Grunig, 1999). The next strategies addressed include task sharing (Hon & J. E. Grunig, 1999), solicitation of increased participation (e.g., Gruen, 1997), investment (Ledingham and Bruning, 1998), and assurances (Hon & J. E. Grunig, 1999), in addition to the communication of relational messages and efforts (Bruning, 2000; Bruning, Castle, & Schrepfer, 2004; Ledingham, Bruning, Thomlison & Lesko, 1997; L. J. Wilson, 2000). Then, stewardship (Hon & J. E. Grunig, 1999; Kelly, 2001), personal and interpersonal influence (e.g., Huang, 1990; H. C. Shin, 1994; Sriramesh, Y. Kim, & Takasaki, 1999; Toth, 2000), and conflict resolution strategies (Hon & J. E. Grunig, 1999; Plowman, 2007) are explored. A discussion of cultivation challenges concludes this section.

Access. Organizations use *access* to allow their publics to contact them and to engage them in a meaningful conversation (Hon & J. E. Grunig, 1999). Organizations should give liaisons of publics the opportunity to share their opinions about important decisions (Hon & J. E. Grunig, 1999). In addition, organizations should respond to their publics' direct complaints and questions with the intention that publics will seek their response before either complaining or directing questions to third parties (Hon & J. E. Grunig, 1999). According to C. R. Bell (2003), members who complain to their organizations tend to be the most loyal members organizations have. Ki (2006)

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established a causal link between access and control mutuality (satisfaction with the amount of control in a relationship). In her study, she found no connection between access and the relationship outcomes of satisfaction, trust, and commitment.

A Web site is one way that an organization can invite publics to access it (Kent & M. M. Taylor, 1998). Many public relations scholars have examined strategies for building relationships through the Internet (e.g., Chen, 2005; Jo & Y. Kim, 2003; Ki, 2003; Lim & J. H. Shin, 2001; Seltzer, 2005; Vorvoreanu, 2005; Yoon, Cropp, & Cameron, 2002). Bruning (2000) and Mullen (2006) advised that organizations prevent technology from replacing a personalized approach to relationship building. According to Crockett (2006), 64 percent of U.S. households do not have Internet access, and experts expect that households with Internet access will increase to only 67 percent by 2009. Reasons include affordability, difficulty with access due to rural locations, lack of desire to acquire the skills at a later age, privacy and security concerns, and beliefs that the Internet does not offer anything important.

Openness. The strategy of *openness* refers to sharing thoughts and feelings (Hon & J. E. Grunig, 1999). It involves an organization's willingness to share opinions, concerns, and problems (L. A. Grunig et al., 2002). Ki and Hon (2006) studied 286 Web sites of Fortune 500 companies. They concluded that openness is the most commonly used relationship strategy in the population they studied. One application of openness is to be transparent with business practices, such as financial allocations (Hon & J. E. Grunig, 1999). Disclosure is a key part of best practices in public relations (J. E. Grunig & Huang, 2000; J. E. Grunig & L. A. Grunig, 1996), and it is an important ethical consideration (Bivins, 1987; J. E. Grunig & L. A. Grunig, 1996). In addition, openness

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contributes to trust (Dimmick, Bell, Burgiss, & Ragsdale, 2000; J. E. Grunig & Huang, 2000). Gruen (1997) found that sharing organizational knowledge has no effect on retention in associations. In addition, Hung (2000) found that openness could not guarantee a strong relationship. Nevertheless, most participants in Kovacs' (2003) study identified openness as an important cultivation strategy.

Kovacs (2003) noted that scores for openness overlapped with scores for access, and Ni (2006) combined openness and access in her organization of dissertation results. Ni explained that the strategies were too similar to be treated separately. Since access denotes opportunities for contact and openness denotes the actual sharing of information, these concepts are recognized separately in this study. Even if results overlap in these areas, the concepts are distinct.

Ledingham, Bruning, Thomlison and Lesko (1997) explored literature about relationship management from areas such as interpersonal relationships, marketing, and social psychology. They identified openness as one of five concepts that is important to relationships. Ledingham and Bruning (1998) found that openness contributes to satisfying relationships. In addition, Bruning and Ledingham (1999) found that openness is an important strategy for cultivating relationships in their study of a bank's relationship with customers.

Symmetric communication. Engaging in discussions to reach decisions that satisfy not only an organization but also its publics is known as symmetric communication (J. E. Grunig, 1997). In practice, an organization practicing symmetric communication uses advocacy and collaboration to meet both an organization's interests and its publics' interests (J. E. Grunig, 2001). In 1999, Huang found that symmetric communication

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builds trust. In her 2007 meta-analysis of Taiwan studies, she concluded that symmetric communication results in relational satisfaction, relational commitment, control mutuality, trust, and face and favor. I explain these concepts later in this chapter. In addition, Huang (2007) concluded that organizations believe they engage in symmetrical communication more often than publics perceive, and non-profit organizations are more likely than other organizations to use symmetric communication.

Dialogue. According to Kent and M. M. Taylor (1998), *dialogue* involves soliciting information from publics, listening, and responding to messages. Organizations using this cultivation strategy should listen, show empathy, contextualize issues, focus on long-term goals, and seek various perspectives.

Scholars have offered insights to the dialogue strategy. Ni (2006) found that an organization's listening improved employees' relationships with it, even when problems were not resolved. She explained that employees valued an outlet for communicating issues and recognized that resolving the problem was unlikely, at least in the short-term. Kovacs (2003) emphasized the importance of making a dialogue frank, which communicates honesty. Bruning, Langenhop, and Green (2004) recommended that public relations practitioners launch relationship-building programs that involve frequent interaction between an organization and its publics. Many researchers and managers in the field have concluded that regular communication and feedback enhances retention (e.g., ASAE, 2004; Benjamin, 1993; Brudney, 1990; Caron, 2003; Hager & Brudney, 2004; Metter, 2002; Sirkin & Meister, 1999; Smikle, 2002; Stat, 2002; Waddington & Kerr, 1999). One avenue for dialogue is to have a dialogic loop on an organization's Web site (Kent & M. M. Taylor, 1998). The dialogic loop should enable publics to

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communicate questions and concerns electronically in a way that enables the organization

to provide responses to the information it receives (Kent & M. M. Taylor, 1998).

Positivity. Hon and J. E. Grunig (1999) described *positivity* as a strategy to engage

in activities that help publics enjoy the relationship. For example, organizations apply this

strategy with customers by providing exceptional service (Hon & J. E. Grunig, 1999),

and they use this strategy with employees by planning community service programs (see

L. J. Wilson, 2000). Stafford and Canary (1991) found that positivity predicts strong

control mutuality scores. Ki (2006) explained this connection by stating,

"[C]ommunicating in a cheerful, courteous, and polite manner is more likely to

encourage cooperation from the other party and help preserve interdependence in a

relationship" (p. 24). Ki (2006) found that positivity has a causal link with control

mutuality, satisfaction, and trust. Most of the multinational organizations in Ni's (2006)

study used the strategy of positivity; however, domestic companies in China were less

likely to do so. Positivity efforts included travel opportunities and special events.

Although most participants valued positivity efforts, some were so used to the efforts that

they took the gestures for granted.

Consubstantiality. A related strategy to positivity is *consubstantiality*, which is an

idea that Burke (1950) originated. As originally constructed, consubstantiality refers to

participants' perceptions that they share common characteristics with the rhetor (in this

case, an organization). Esposito and Koch (2000) positioned consubstantiality as a

relationship cultivation strategy. They stated that relationships are "likely to be sustained

and intensified" when communication articulates a common identity between the two

parties (p. 222). For example, they stated that a news agency used the strategy of

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consubstantiality with viewers by using sources that resonated with the audience. In addition, the news agency used consubstantiality by implementing a rhetorical style that focused on commonality and positioned the news organization as a community participant rather than as an objective, detached source.

Esposito and Koch (2000) extended the concept of consubstantiality by stating, "We would suggest that a sense of relationship is a step beyond this rhetorical act [of consubstantiality] extending into creation of both retrospect and prospect for future coarticulation of the parties" (Esposito & Koch, 2000, p. 222). Esposito and Koch seemed to believe that they entered new territory in rhetorical criticism; however, the technique of constituting an audience's identity and relationships, including the audience's history and future, is developed in rhetorical criticism under the label of constitutive rhetoric (see Charland, 1987).

Constitutive rhetoric. Organizations can use constitutive rhetoric to build their publics' identities, which can be a powerful practice that results in strong relationships (e.g., Stewart, 1997). Although public relations scholars have only touched on this concept (e.g., Esposito & Koch, 2000), constitutive rhetoric is a common relationship building strategy that organizations use when they portray people who use their products or services in desirable ways. For example, Macintosh uses constitutive rhetoric to build an anti-establishment identity for Macintosh users (Stein, 2002). Constitutive rhetoric can be a powerful strategy in the context of advocacy organizations (Stewart, 1997). Redefining someone's self-concept develops a strong bond between the rhetor (an organization) and the audience (publics) (Charland, 1987). Rhetorical scholars, such as Katz and Kahn (1978), have documented the potential for this strategy's effectiveness.

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For example, the Black Power movement reconstituted members' identity (see Stewart, 1997), and Red Power rhetoric constructed the Indian lifestyle as superior (see Lake, 1983). In both instances, constitutive rhetoric enhanced the relationship between the target public and the movement leaders.

Networking. Getting involved in the same groups that publics join, such as interest groups and local organizations, is known as *networking* (Hon & J. E. Grunig, 1999). Hung (2000) found that networking can be an effective strategy for cultivating new relationships. She explained that this strategy is especially important in China, where personal relationships are particularly valued. However, in Ni's (2006) study of organizations in China, she found that managers were sensitive of the strategy of networking because they felt it suggested nepotism. In a study about Novell's community relations efforts, L. J. Wilson (2000) demonstrated that organizations could become catalysts for social groups. She reported that many employees invited their friends and families to help with a company's volunteer projects.

Task sharing. An organization's collaboration with publics to address issues is called *task sharing* (Hon & J. E. Grunig, 1999). Task sharing contributes to control mutuality, satisfaction, and commitment (Canary & Stafford, 1994; Stafford & Canary, 1991). Ki (2006) discovered that task sharing has a causal link with control mutuality and satisfaction. According to Hon and J. E. Grunig (1999), organizations and publics should join forces to resolve problems, regardless of whether the problem is jointly shared or specific to one party (see McComas & Derville, 2005). L. J. Wilson's (2000) study provides an example of an organization's participation in resolving community problems that it did not create. The organization she studied, Novell, implemented an employee

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volunteer program that included employees' requests, such as helping local food banks and renovating a safe house for children.

Based on volunteer psychographic research, Dutta-Bergman (2004) concluded that fitness activities and clean-up events would be smart ways to attract volunteers. He also said that messages should appeal to people's high self-efficacy. Dutta-Bergman suggested that attempts to attract people who do not normally volunteer could be framed as social opportunities to get together and have fun.

In Ni's (2006) study, multinational organizations focused on sharing tasks that benefited both employees and the organization, such as further job training and education. She also found that the domestic companies in her study were more likely than multinational organizations to help employees solve problems that were less business-oriented, such as personal concerns.

Solicitation of increased participation. Increasing people's level of activity with an organization enhances retention (e.g., Gruen, 1997). However, Cress, McPherson, and Rotolo (1997) expressed disagreement with this strategy. They conducted a 15-year study of 1,050 people in 10 Nebraska towns. Their dependent variable was membership persistence, and their independent variables were the number of hours per month people spent volunteering and attending meetings. The researchers controlled for demographic variables and the type of volunteer organization. Cress et al. (1997) found that the higher the participation level (regardless of which independent variable was used), the shorter the duration of membership persistence, which contradicts the advice of scholars (e.g., Van Chau, 1998; Zeithaml, Berry, & Parasuraman, 1996) and experts in the field (see Stat, 2002; Kahan, 2004; West, 2002) who argue that participation enhances retention.

Cress et al. explained that studies with a conflicting result had a flawed research design by not studying enough organizations over a long-term period and by not tracking participation levels and retention over a long time period. Cress et al. (1997) found a gradual effect at all participation levels, which eliminates the conclusion that this phenomenon only happens to people at the highest participation levels due to burnout. The researchers endorsed the *competition thesis*, which holds that people cannot be involved in organizations for a long time period because many sources compete for their time and resources (e.g., family, career, competing organizations).

Investment. According to Ledingham and Bruning (1998), *investment* refers to efforts to build the organization-public relationship. The only other detail added to this concept in their line of research was one question they ask publics for measuring it, which is whether publics think the organization "invests in the community" (Ledingham, Bruning, & Wilson, 1999, p. 177). No explanation was offered to explain whether the community referred to a geographic location of the organization or a community of publics. Further development of this strategy would benefit the literature.

Assurances. Organizations can give *assurances* by showing that they care for their publics (Hon & J. E. Grunig, 1999; J. E. Grunig & Huang, 2000; L. A. Grunig et al., 1992). One way that organizations give assurances is by treating publics with respect (Kovacs, 2003). A second way to exhibit assurances is to communicate the legitimacy of publics' concerns (Susskind & Field, 1996). A third way to communicate assurances is to make decisions that benefit publics (Hon & J. E. Grunig, 1999). Ni (2006) said that one way organizations provide assurances is by helping employees have a work-life balance. Hung (2000) found that an organization's successful use of assurances increases publics'

satisfaction and commitment to their relationship with the organization. Ki (2006) tested Hon and J. E. Grunig's (1999) cultivation strategies and found that trust, control mutuality, and satisfaction correlate with the strategy of assurances more than they do with any other strategy tested. She found that commitment is most strongly correlated with the dual strategies of assurances and positivity. This research illuminates the importance of assurances in cultivating relationships.

Communication of relational messages and efforts. An organization should communicate messages that encourage publics to believe that they have a relationship with it (Bruning, 2000; Bruning et al., 2004). This strategy is based on the finding that recognizing a relationship is correlated with retention (Bruning, 2000; Bruning, Castle, & Schrepfer, 2004). Kelleher and Miller (2006) found that relational messages increase the quality of an organization-public relationship (cited in Ki, 2006).

Stewardship. According to Kelly (2001), *stewardship* has four components: reciprocity, responsibility, reporting, and relationship nurturing. *Reciprocity* refers to showing gratitude for publics' supportive attitudes and actions. *Responsibility* means "organizations act as good citizens" (Kelly, 2001, p. 285). Organizations that exhibit responsibility keep their promises and earn their publics' support through their actions. By *reporting*, organizations disclose information, which upholds legal and ethical standards. Organizations engage in *relationship nurturing* by valuing their publics and involving them in meaningful ways. Kelly stated that treating publics well through relationship nurturing goes beyond the other strategies by giving publics sustained attention and care throughout the longevity of the relationship.

Personal and interpersonal influence. Based on a study in India, Sriramesh and

J. E. Grunig (1988) introduced *personal influence* as a strategy for using individual

relationships to achieve favor. According to Huang (2000), this strategy emerged in

authoritarian cultures as a way to cope by exploiting individual relationships. Examples

of personal influence practices include providing entertainment, food, drinks, and gifts

(e.g., Huang, 1990; H. C. Shin, 1994; Sriramesh, Y. Kim, & Takasaki, 1999). Sriramesh

et al. (1999) interviewed public relations practitioners in Japan who have dinner every

night with reporters. J.-H. Shin and Cameron (2003) referred to personal influence

practices as *informal relations*. Huang (2004) referred to these practices as *social

activities*. In addition, Huang (2001b) introduced the Chinese concept of *mianzi*, which

she defined as *facework* in English. This concept involves helping people look good by

protecting their dignity, which is casually known as *saving face*.

Although Huang (2001b) and Jo (2003) positioned *face and favor* as culturally

specific considerations, researchers have applied these concepts in various geographic

cultures. Kovacs (2003) identified the importance of face for activist organizations in

Britain, which has a different culture than East Asian countries. She noted that activist

organizations need to take a hardline stance in public (to save face) but could privately

cede ground when discussing best solutions for the public interest. I argue that Downes'

(1998) study is an example of the use of favor in U.S. culture. Downes studied public

relations practices between Capitol Hill press secretaries and reporters. Instead of gifts of

food and entertainment (as described in Huang's examples), press secretaries provide

reporters with inside information about Congressional representatives from other offices.

One participant said, "I pass on a lot of things to them – especially things that don't

involve my boss … that gives them a leg up on the competition, and they, in turn, feel favorably disposed to me" (p. 278). Downes' (1998) study contradicts Jo and Y. Kim's (2004) statement that "Preventing negative publicity by using personal relationships with journalists does not correspond to Western principles of public relations" (p. 301). Thus, evidence of face and favor exists in various cultures.

Toth (2000) splintered the category of personal influence into two. She stated that efforts to develop individual relationships for the benefit of an organization and its publics are *interpersonal influence* strategies. Attempts to cultivate individual relationships for the sole benefit of the organization are *personal influence* strategies. Toth conceptualized these constructs on a continuum with interpersonal influence in the center and an organization's personal influence and a public's personal influence on opposite ends. Interpersonal strategies are ideal for relationship building (Toth, 2000). Organizations should build "reservoirs of credibility and trust" by making "choices that build and maintain credibility," which could mean making choices that result in short-term loss and long-term gain (Toth, 2000, p. 217).

Chia (2005) and Rhee (2004, 2007) found that an organization's representatives can cultivate personal relationships to build trust (Chia, 2005; Rhee, 2007). In Rhee's (2004, 2007) study, employees' interpersonal communication with publics played a larger role in enhancing the organization-public relationship than mediated communication did. Rhee reported that putting a human face on the organization helped people trust it.

Conflict resolution strategies. Scholars articulated the importance of conflict resolution strategies for cultivating relationships (Huang, 2001a; L. A. Grunig et al., 2000; Vasquez, 1996). Organizations must often make decisions that some members of

publics will not like (Plowman et al., 2001). Using a fair process can keep people

together, even when they dislike the outcome (H.-S. Kim, 2005). Plowman, Briggs, and

Huang (2001) emphasized the importance of immediately managing conflicts before they

escalate. According to Kovacs (2003), logical argumentation and respect are fundamental

to resolving conflicts. In the following discussion of conflict resolution, I address

mediation, perseverance, integrative strategies, and dual concern strategies.

Huang (1997) originally introduced *mediation* as a strategy that involves an

outside, disinterested expert to arbitrate a conflict. Plowman (1995, 2007) worked against

the idea of unbiased mediation. He said that contemporary approaches to mediation

involve the acknowledgement that biases, even among unaffiliated third parties, pervade

communication interactions. Credibility comes not from the old-fashioned sense of a

neutral, disinterested party but from the perception that the mediator has special

knowledge and insight into the situation and is committed to finding a mutually satisfying

solution. Plowman (2007) noted that many mediation models prioritize the mediator's

credibility as a prerequisite to effectiveness (Bercovitch, 1996; Gadlin & Pino, 1997;

Kolb, 1985; Moore, 1986).

Based on business management literature, Plowman (2007) introduced

perseverance as a strategy in which people exercise humility while maintaining stamina

to not acquiesce to an undesired solution. Turbulent negotiations and attempts by another

party to take advantage make this strategy useful. Plowman (2007) said that this approach

involves knowing when walking away from a conflict is better than proposed solutions,

listening when the other party complains, maintaining a list of issues that require

conversation, advocating one's interests while only accepting a solution that satisfies all

parties, tackling contentious issues last, giving ground gradually, and being resilient to emotions, such as irritation.

Additional strategies include integrative strategies and symmetric dual concern strategies. Organizations using *integrative strategies* seek a win-win solution (Hon & J. E. Grunig, 1999). *Symmetric dual concern strategies* involve agreeing to disagree if a win-win solution cannot be found and making decisions in terms of what is best for the relationship, regardless of whether it involves giving ground (Plowman et al., 2001).

Integrative strategies and symmetric dual concern strategies are compatible with the family therapy literature. McNamee and K. J. Gergen (1999) wrote about a relational approach to resolving conflict in which the focus of conflict resolution is the relationship rather than solely individual interests. The relationship becomes a prism through which dialogue occurs. Participants are asked to think about their communication and concerns in terms of their affect on the relationship. One way to do this is for participants to view their complaints about one another as patterns of interactions in which one person acts in a particular way in response to another's actions. Participants are encouraged to identify the pattern and how their reaction to one another's aggravating stimuli escalates the conflict and reinforces the undesired communication sequence. Participants are encouraged to "act unnaturally" by disrupting the pattern (p. 38). One way to do this is to identify the pattern to the partner and jointly create the possibility for a different outcome.

K. J. Gergen (1999) also emphasized the importance of affirming parts of each other's views as valid when discussing conflicts. He stated, "For you to affirm means locating something within my expression which you can agree with or support. [To]

affirm … is to grant worth, to honor the validity of my subjectivity" (p. 159). K. J. Gergen added that to deny one's beliefs is to also discredit the relationships that spawned those beliefs.

In addition, McNamee and K. J. Gergen's (1999) relational paradigm involves attributing undesired behavior of others to various cultures and histories rather than blaming individuals. From this perspective, people act in particular ways partly as representatives of the collectivities to which they belong. McNamee and K. J. Gergen wrote that this view provides "multiple means of understanding human action as deeply and inextricably embedded within forms of cultural (and environmental) life" (p. 18). For example, by explaining communication behaviors as gendered patterns, participants gain the opportunity to rebel and be different from their gendered type by understanding someone else's cultural group and speaking that person's language. McNamee and K. J. Gergen explained:

> By framing an interpersonal antagonism as a manifestation of larger group
> relations, the tendency is reduced to see each other as personally faulty. Rather
> than blaming each other, participants may come to see themselves as playing out
> group antagonisms – puppets to outside forces. (p. 41)

M. Gergen (1999) also showed how blaming external forces can make the process of placing blame so labored that people avoid it and instead focus on solutions. M. Gergen provided a scenario in which an accident could be 1/16 fault of the driver, 1/16 the cell phone, 1/16 the color of the vehicle, 1/16 the weather and so on. She commented, "Responsibility could be so embedded in so many complex interactions and thus spread so thin among various participants, it might just disappear as an interesting and useful

idea" (p. 103). M. Gergen said that this process could result in people avoiding the blame game, which is healthy for moving forward.

In addition, McNamee and K. J. Gergen's (1999) approach involves viewing individual problems as group problems, which also tends to reduce individual blame while increasing group responsibility and productive solutions. Even when people geographically leave others to avoid conflict, they have not severed the relationship. McNamee and K. J. Gergen explained, "There is no moment of free action, because the very intelligibility of action itself is always already freighted with otherness. We do not move out of relationships but simply traverse the terrain of connection" (p. 25).

Asymmetric dual concern strategies include strategies that prioritize the organization's interests, such as *contending* (persuading a public to agree with an organization's position), *avoiding* (physically or mentally exiting a conflict), *accommodating* (yielding one's position and lowering one's goals), and *compromising* (ceding ground without happiness about the result) (Hon & J. E. Grunig, 1999). Another asymmetric dual concern strategy is the *principled approach* (embracing an ethical position and not budging from it) (Plowman et al., 2001).

Cultivation challenges. Due to complex situations, cultivation strategies do not always work. Ki (2006) tested cultivation strategies in the context of the relationship between the Florida Farm Bureau and its members. Although she found that access, positivity, sharing of tasks, and assurances helped the bureau develop relationships with members, she also found that the strategies of openness and networking did not improve members' evaluation of any relationship quality.

Contextual factors, such as cultural history, can limit the effectiveness of relationship strategies. For example, the Taiwanese company in Hung's (2000) study experienced difficulty with building relationships with Chinese partners due to historical events between Taiwan and China. Hung (2002) also found that culture plays a role in determining which strategies multinational companies use in China.

Sriramesh (2007) challenged scholars to integrate various types of culture in the public relations literature, including organizational culture. He commented, "Sadly, culture has yet to be integrated into the public relations body of knowledge" (p. 507). Examining organizational culture could be particularly important to member relationships and member retention in advocacy organizations. L. A. Grunig (1995) said that subcultures exist within an organization's culture, which could be an insightful area of study. Another area that would contribute to the public relations literature is the study of the rites and rituals that shape organizational culture, which could also influence members' relationships with an organization (Sriramesh & Vercic, 2001).

Relationship Outcomes

Based on Cutlip et al.'s (2000) scholarship, Broom et al. (2000) defined *relationship outcomes* as the consequences that alter the environment and secure, maintain, or adjust goals both within and outside of organizations. According to Broom et al., outcomes have their own properties that differentiate them from relationships. Ki and Hon (2007) stated, "If the ultimate goal of public relations is to build mutually beneficial relationships between an organization and its publics, then measuring the outcomes of those relationships provides an important indicator of public relations effectiveness" (p. 2, also see Lindenmann, 1997). In this section, I describe the following

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relationship outcomes: relationship qualities (e.g., trust, satisfaction), relationship types (e.g., communal, exchange), relationship dimensions (e.g., professional, personal), goal achievement, co-production, retention, and reputation. Before doing so, I address some tangled connections in the literature.

L. Aldoory pointed out that some outcomes are positioned as predictors of other outcomes in the public relations literature, which technically makes them both antecedents and outcomes (personal communication, April 23, 2007). For example, relationship qualities are one type of relationship outcome, and scholars (e.g., Hon & J. E. Grunig, 1999) argue that relationship qualities predict reputation, which actually gives relationship qualities a second status as antecedents. Furthermore, some researchers argue that some relationship qualities predict other relationship qualities (e.g., Barkan, Cohn, & Whitaker, 1993). In this sense, the literature positions some outcomes as antecedents to other outcomes; however, all public relations literature reviewed simplifies conceptualizations by only classifying outcomes with a dual status as outcomes (e.g., Hung, 2007). For clarity, this study follows the traditional organization of other public relations studies, while acknowledging the importance of this point and encouraging studies that would be dedicated toward modeling all connections.

Relationship qualities. J. E. Grunig and Huang (2000) identified the following relationship qualities: control mutuality, trust, commitment, and satisfaction. Achieving positive evaluations of these qualities results in long-term, mutually beneficial relationships (Hon & J. E. Grunig, 1999). According to J. E. Grunig (2002), the order of this listing reflects the amount of importance of each relationship quality. However, Ki (2006) stated that the importance of relationship qualities depends on the organization

and the public. She recommended that organizations identify the most important qualities to their relationships based on their publics' opinions. Then, organizations should develop strategies to achieve the qualities. In her study, satisfaction, trust, and commitment were the best indicators of the quality of the organization-public relationship.

Bruning and Ledingham (1999) presented an alternate set of relationship qualities, which Bruning and Galloway (2003) revised. Bruning and Galloway's qualities include anthropomorphism, professional benefits and expectations, personal commitment, community improvement, and comparison of alternatives. I agree with Ki and Hon (2007) that this list represents a mixture of strategies and outcomes. Consequently, I do not adopt this line of research as an organizing framework.

Trust has three components: integrity, competence, and dependability, according to Hon and J. E. Grunig (1999). People who believe an organization has *integrity* think that it is fair and just. People perceive an organization's *competence* by judging whether it has the capability of fulfilling its promises. People who think an organization is *dependable* believe that it keeps its promises. Based on these components, J. E. Grunig (2002) described trust as the amount of confidence that an organization and a public places in each other and each party's desire to open themselves to one another.

Ledingham and Bruning (1998b) also identified trust as a relationship outcome. They defined trust as the ability to depend on one another, which could include J. E. Grunig and Huang's (2000) ideas of doing as one says and being able to do as one says. However, this description excludes the integrity dimension of trust (i.e., acting fairly), which H.-S. Kim (2005) verified as a requirement for strong relationships.

Scott (2007) found that separating the trust scores for each component provides the most clarity for her clients. She explained that publics often believe a company is competent but do not always believe that it tells the truth about its goals (integrity) or has the intention of reaching them (dependability). She commented, "We want to ensure that our clients are not misled by a fairly robust trust score into thinking that they are doing well on reliability and credibility, when the good score is being driven by competence ratings" (p. 271). According to the 2005 Edelman Trust Barometer, which measures trust among influencers in eight countries, people trust non-profit organizations more than they trust any other type of organization, including companies, media, and government (Scott, 2007).

Trust develops over time (Chia, 2005). Ledingham et al. (1999) found that participants in a long-term relationship with a telephone service company have significantly higher degrees of trust than they have of commitment, investment, involvement, and openness. They stated that one way to interpret this finding is to conclude that the strength of trust escalates based on experiences and information that one has collected over a significant period of time.

Scholars asserted that trust plays a central role in an organization's long-term survival. Vercic and J. E. Grunig (1995) said that organizations would not survive without the trust of consumers, employees, governments, stockholders, and communities. Huang (2001a) identified trust as one of the two most important variables that mediate the results of public relations strategies on conflict resolution. Barkan et al. (1993) stated that organization members who trust their leaders have higher commitment levels than distrustful members have. Lewton (1998) commented that people's declining trust in

organizations results from a public relations focus on glitzy branding campaigns rather than an emphasis on genuine relationships through meaningful dialogue and action.

Control mutuality refers to the extent to which an organization and its publics agree about the degree of influence they should exert in a relationship (J. E. Grunig & Huang, 2000; Hon & J. E. Grunig, 1999). It is about power distribution. Control mutuality involves the idea of mutual legitimacy, which is a construct that L. A. Grunig et al. (1992) recommended for measurement. Huang (2001b) said that control mutuality is important to evaluating relationships because it reflects the widespread occurrence of power asymmetry in organization-public relationships. Ray, Dozier, Broom, and Hofstetter (2006) found that satisfaction increases when organizations share power with publics early in the decision process. Scott (2007) found that corporate scores for control mutuality are often lower than scores for other relationship qualities, suggesting that many companies' publics feel unsatisfied with power imbalance. Holtzhausen (2007) stated that power plays an important role in the lifecycle of activist organizations, and scholars have not adequately theorized power in the public relations literature.

To achieve a positive evaluation of control mutuality, organizations must often share power with stakeholders (Dimmick et al., 2000; M. A. Ferguson, 1984; J. E. Grunig & Huang, 2000). Low control mutuality sometimes results in exploitative relationships (Hung, 2002). According to J. E. Grunig and Huang (2000), efforts to completely control relationships correlate with a decline in relational satisfaction and publics' perceptions of an organization's competence (J. E. Grunig & Huang, 2000).

Researchers have received mixed results about the importance of control mutuality in determining relationship perceptions. Hon and J. E. Grunig (1999) suggested

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that control mutuality matters more than satisfaction and commitment for determining relationship assessments. Huang (1999) found that control mutuality is one of two variables that mediate the results of public relations strategies on conflict resolution (cited in Huang, 2001a). The students in Ki and Hon's (2007) study perceived control mutuality and satisfaction to affect their attitude toward their university more than the other relationship qualities. However, the students in Hon and Brunner's (2002) study reported that control mutuality was one of the weakest indicators of their relationship with university administrators. In addition, Air Force members in Derville and Heisler's (2006) study reported that control mutuality was irrelevant to their relationship with the military.

Some possibilities exist for the fluctuating importance of control mutuality. Ki and Hon (2007) speculated that this construct could vary by organization and public. Derville and Heisler (2006) suggested that cultural context plays a role. For example, they do not expect control mutuality to be important in cases in which participants accept a high level of power distance, such as the military. Hon and J. E. Grunig (1999) noted that control mutuality could be unimportant when a public trusts an organization. Derville and Heisler's research supports this claim.

In addition, sometimes researchers do not accurately measure control mutuality because they conflate the construct with power sharing (as opposed to the accurate definition, which is satisfaction with power distribution). For example, the following statement is one of Huang's (2001b) measures for control mutuality: "In most cases, during decision making both the organization and we have equal influence" (p. 90). Hon and J. E. Grunig's (1999) scale makes the same error, with the following statement:

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"When I have an opportunity to interact with this organization, I feel that I have some sense of control over the situation" (p. 29). These questions do not accurately measure control mutuality, based on J. E. Grunig's (2002) statement that power does not have to be equal for satisfaction to occur. This could explain the low Cronbach's alpha scores in Yang and J. E. Grunig's (2005) and Jo and Y. Kim's (2003) studies, which were .58 and .55, respectively, as opposed to other relationship qualities from both studies, which received scores between .70 and .93.

Satisfaction refers to the degree to which an organization and a public feel amiably toward each other because the other party fulfills its expectations for the relationship (J. E. Grunig, 2002). Ledingham et al. (1999), Ledingham (2003b), and Thomlinson (2000) reinforced this concept by concluding that meeting or exceeding expectations results in satisfaction. M. A. Ferguson (1984) identified mutual satisfaction as an indicator of long-term relationships. Whereas control mutuality and trust could be cognitive qualities, satisfaction is an affective quality (Huang, 2001b). Bruning and Ledingham (1998a) stated that commitment, investment, involvement, openness, and trust all influence a public's satisfaction with an organization.

Commitment refers to the degree to which an organization and a public feel the relationship is worth the energy to sustain and cultivate it (J. E. Grunig, 2002). J. E. Grunig and Huang (2000) based their conceptualization of commitment on several relationship management studies in the marketing literature. According to one marketing study, brand commitment results in brand loyalty (R. Morgan & S. Hunt, 1994, cited in Huang, 2001b).

Three types of commitment are normative, continuance, and affective (Gruen, Summers, & Acito, 2000). Isolating the components of commitment reduces ambiguity and complexity, which helps people influence the construct (Gruen, 1997). Allen and Meyer (1990) said that people with a positive *normative commitment* stay because they feel a moral obligation to help it.

A public with *continuance commitment* has self-serving reasons to stay in an organization, such as financial benefits or social connections (Gruen et al., 2000). Gruen (1997) found that recognition and attempts to develop relationships among members do not significantly influence continuance commitment in an association; however, continuance commitment affects participation.

People with a positive *affective commitment* stay because they feel emotionally bonded to an organization (Allen & Meyer, 1990). Mowday, Porter, and Steers (1982), in addition to Gruen (1997), found that affective commitment results in increased participation in a relationship with an organization. Gruen et al. (2000) found that recognizing association members for their contributions modestly boosts affective commitment. In addition, Gruen (1997) discovered that giving association members information about the organization increases affective commitment. He explained that this action helps members feel like they belong to the organization rather than feeling like outsiders on the fringe. Bruning (2002) observed that an organization often succeeds at communicating what it does but fails at communicating its feelings for publics.

Relationship types. Researchers have presented types of relationships that indicate their quality. Hung (2005) presented the relationship types on a continuum. One end reflects relationships involving self-interest, and the other end describes relationships that

focus on another party's interests. The continuum, from others' interests to self-interests, is in the following order: one-sided communal, mutual communal, covenantal, exchange, symbiotic, contractual, manipulative, and exploitative. Relationship types are not mutually exclusive (Hung, 2005). For example, a *symbiotic* relationship occurs when an organization relies on a public for achieving goals. This type of relationship could occur concurrently with several relationships, such as an *exchange* relationship, which occurs when an organization helps a public in exchange for past or future favors. Although categories are not mutually exclusive, researchers categorize relationships by the type that seems to be most strongly represented by each individual (Hung, 2005). Thus, if a person emphasized trading favors, the researcher would identify an exchange relationship. If members of a public emphasized various relationship types, the researcher would list each type that the members identified (Hung, 2005).

According to J. E. Grunig (2002), *communal* relationships exist when an organization helps publics out of concern for their well being – even if publics do not give anything in return. Practitioners contribute value to organizations when they help organizations achieve communal relationships with publics. J. E. Grunig stated that the extent to which a public thinks it has a communal relationship with an organization could be the best measurement of success for an organization's public relations. H.-S. Kim (2005) found a positive correlation between symmetric communication and communal relationships. Hung (2002) described two types of communal relationships: one-sided and mutual. *One-sided communal* relationships occur when one party believes that the relationship is communal. *Mutual communal* relationships occur when both the organization and publics believe the relationship is communal.

As mentioned earlier, *exchange* relationships occur when an organization helps publics in exchange for past or future benefits (J. E. Grunig, 2002). Organizations with exchange relationships often use assurances and access as cultivation strategies (Hung, 2002). Although some organization-public relationships begin as exchange relationships that develop into communal relationships, sometimes relationships start as communal relationships so that transactions can occur (J. E. Grunig, 2002; J. E. Grunig & Hung, 2002). Yang (2005) found that a public's perceptions of relationship qualities in an organization-public relationship correlate with whether they identify a communal or exchange relationship. H.-S. Kim (2005) discovered a negative association between an organization having a flat, organic structure and having an exchange relationship.

Hung (2002) described covenantal, symbiotic, and contractual relationships. *Covenantal* relationships occur when organizations show assurances by attending to publics' concerns and when they use positivity by making the relationship enjoyable. As mentioned earlier, an organization that relies on a public to achieve goals has a *symbiotic* relationship. Organizations do not have to use symmetrical strategies to cultivate symbiotic relationships with publics. *Contractual* relationships begin with formal requirements for each party. Power imbalances are possible in this type of relationship.

Hung (2002) also presented two undesirable relationship types: manipulative and exploitative. Hung did not provide a clear explanation of *manipulative* relationships, because the key word she used to explain the relationships was "manipulate," and she did not explain what counts as manipulation. Hung explained the concept by stating that organizations sometimes manipulate the media. In this context, she might mean that manipulative relationships are built on distortions of truth. *Exploitative* relationships

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occur when an organization takes advantage of publics who adopt communal norms. Exploitative relationships also occur when an organization fails to meet its promises. Organizations with exploitative relationships often use asymmetrical strategies, such as contending, when cultivating relationships.

Relationship dimensions. Another category of outcomes refers to the caliber of professional, personal, and community dimensions of an organization-public relationship (Bruning & Ledingham, 1999). Bruning and Ledingham (2000b) found that these dimensions affect people's satisfaction. Scott (2007) found that some people experience difficulty evaluating their relationship with an organization because they do not know whether to assess the relationship from a personal or professional perspective.

A *professional* relationship involves an organization's delivery of services and products that fit its publics' lifestyles (Bruning & Ledingham, 1999). According to Bruning and Galloway (2003), publics expect an organization to have a customer focus, spend resources on cultivating customer relationships, and act in a socially responsible way.

Scholars offered differing conceptions of a public's *personal* relationship with an organization. Bruning and Ledingham (1999) stated that people base personal relationships with an organization on the extent to which they trust the organization to keep its promises, invest in customers, and show interest in individuals. Bruning and Galloway (2003) revised this definition. They said that the quality of a personal relationship between an organization and its publics is based on the degree to which it positively reflects anthropomorphism: the expression of human qualities. According to Bruning and Galloway, people with a positive evaluation of an organization's

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anthropomorphism believe it to communicate its plans, follow through on promises, and spend resources on customers. Through a third interpretation, personal relationships refer to the one-on-one relationships that exist between an organization's representatives and individual members of publics (Sha, 2005). I adopted this last definition because it isolates the uniqueness of developing one-on-one relationships. Individual relationships are expected to be pertinent to any study of membership in a grassroots advocacy organization. The grassroots nature of an organization implies at least a moderate degree of interaction between staff and members. Consequently, I expected theoretical insight to result from studying the individual relationships between individual staff and members.

Bruning and Ledingham (1999) said that *community relationships* involve an organization's investment in its service areas (such as improving the local economy or reducing social problems), openness, and desire to support community events. Kruckeberg (2000) stated that people expect community-building programs, especially from global corporations. In Hung's (2002) study, multinational companies in China attributed their major successes to community involvement. The community dimension of relationships is apparent when considering companies that have received activism for their effect of putting local stores out of business and giving employees low compensation.

Goal achievement. An organization's relationships affect its ability to achieve goals (Broom et al., 1997; Scott, 2007). For example, strong relationships with employees often result in job satisfaction and productivity, which also help an organization achieve its goals (Hon & J. E. Grunig, 1999; Rhee, 2004). In addition, organizations can reach goals more easily because strong relationships result in fewer

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litigation costs, regulations, and pressure campaigns (Bridges & Nelson, 2000; J. E.

Grunig, 1992). Coombs and Holladay (1996, 2001) found that publics who have negative

relationships with organizations before a crisis attribute more blame during a crisis than

they do to organizations that enjoy positive relationships with them.

Hon and J. E. Grunig (1999) said that an organization with good relationships

with publics chooses goals that publics inside and outside of the organization support.

Consequently, the organization faces less opposition in its pursuit than it would otherwise

experience (Hon & J. E. Grunig, 1999). Hon and J. E. Grunig noted that establishing

shared goals is challenging due to multiple publics who have various interests.

Co-production. Strong organization-public relationships result in co-production.

When people are so fond of an organization that they go out of their way to promote it to

others, co-production occurs (see Sheth & Parvatiyar, 1995). People who engage in

co-production are more likely to stay with an organization than others. Thus,

co-production enhances retention (see Hager & Brudney, 2004; Jacobs, 2004; Stat, 2002;

Wolford, Cox, & Culp, 2001).

Retention. Due to this study's focus on member relations in an advocacy

organization, retention is an important outcome to examine. According to Mitchell and

M. Taylor (2004), organizations must pay at least five times more to attract volunteers

than they do to cultivate relationships with current volunteers. Thus, organizations should

focus on relationship cultivation. Researchers also found a correlation between the

quality of personal, professional, and community relationships and retention (Bruning,

2002; Bruning & Ralston, 2000; Bruning et al., 2004; Ledingham, 2003). In addition,

good relationships are connected with loyalty, which results in stakeholder retention

(Bruning & Ledingham, 2000a; Y. Kim, Womans, & Jo, 2002; Ledingham & Bruning, 1998b; Ledingham et al., 1999). Customers with a long relationship with an organization are more likely to contemplate the decision to leave an organization, whereas new customers simply leave (Ledingham et al., 1999). For a member to have an equal chance of staying or leaving when offered a better deal from a competitor, the member needs to have a relationship with the organization for at least 16 years, according to one study by Ledingham et al. (1999). Thomlison (2000) applied social exchange theory to describe when relationships end. He stated that although unsatisfied publics stay with an organization that does not meet their expectations, they leave once they find better alternatives.

Reputation. Many scholars have studied reputation as a direct outcome of organization-public relationships (e.g., J. E. Grunig & Hung, 2002; Yang & Mallabo, 2003). L. A. Grunig et al. (2002) concluded that reputation results from relationships, and they asserted that the quality of relationships, in addition to the quality of reputation, arise from actions more than words. J. E. Grunig (1993) originally expressed this idea by asserting that organizations should move away from superficial, symbolic relationships that involve pursuing a positive image[6] and instead build substantive, behavioral relationships. Relationship building and by extension, reputation, depend on both communication and action. This idea is supported by research from Ledingham and Bruning (2000) and Hung (2002).

J. E. Grunig and Hung (2002) stated, "Public relations activities have a much stronger theoretical and empirical link to relationships than to reputation" (p. 43). The

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[6] Wan and Schell (2007) attempted to ameliorate the word "image" by arguing that an image does not solely result from symbolic attempts.

authors concluded that evaluation efforts should focus on measuring relationships rather than reputation. According to Coombs (2000), organizations that ignore or take advantage of their relationships with publics harm their reputation. Similarly, Coombs and Holladay (2001) stated that a negative relationship history results in a negative reputation. Yang and Mallabo (2003) and Yang (2004) discovered that organizations with bad reputations could improve their reputations by cultivating relationships.

In 2005, Yang found that an organization's reputation comes from the type of relationship that an organization has with a public and the quality of the relationship. Exchange relationships enhance the reputation of companies, although exchange relationships hurt the reputation of non-profit organizations. Thus, public relations specialists should focus on achieving desirable relationship types and assessments of relationship qualities to influence reputation (J. E. Grunig, 2006).

<div align="center">Advocacy Organizations</div>

Following a call by several public relations scholars for scholarship that adopts an activist organization's perspective (see Dozier & Lauzen, 2000; Karlberg, 1996; Rodino & DeLuca, 1999; M. Taylor et al., 2001), public relations researchers have established a growing stream of research that is centered on an activist organization's interests. Although Holtzhausen (2007) stated that activist organizations have different needs, organizational structures, and financing than companies have, she noted that as activist organizations become institutionalized, scholars could study them "in the same way as corporations once they have the same structural and organizational attributes" (p. 369). She offered PETA (which I classify as an activist organization) and the Sierra Club (which I classify as an advocacy organization) as examples. Kovacs (2001) identified

goal achievement as an important measure of an activist organization's[7] success. Smith and D. P. Ferguson (2001) identified two goals of activist organizations: to ameliorate the problem that motivates their actions and to ensure the survival of their organization.

To achieve goals that involve influencing targeted organizations, J. E. Grunig and L. A. Grunig (1997) recommended that activist organizations use symmetrical techniques before resorting to asymmetrical tactics. Anderson's (1992) study documented the success of this approach, and Kovacs' (2001, 2003) studies showed the success of exclusively using symmetrical techniques. Murphy and Dee (1992) noted that activist organizations that refuse to compromise position themselves ineffectively; however, Derville (2005) discussed the advantages of not compromising. Hon (1997) described the symmetrical techniques that Martin Luther King used during the Southern Christian Leadership Conference, such as opening lines of communication. Kern-Foxworth (1992) also documented Martin Luther King's public relations practices and emphasized his use of church as an organizing place.

I located five studies that public relations scholars conducted about activist organizations' use of message frames for spurring political activity. E. L. Collins et al. (2005) studied 304 activist organization Web sites. Based on Snow and Benford's (1988) framing functions[8], E. L. Collins et al. stated that activist organizations should identify the problem they share (diagnosis), the parties who contribute to the problem or enable it to exist (attribution of blame), the action that is needed to fix or at least ameliorate the

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[7] The organizations in Kovacs' (2001, 2003) studies best fit an advocacy organization category.
[8] Snow and Benford's model is rooted in Burke's (1950) stages, which Burke labeled as guilt (needing to place blame), mortification (taking the blame) or victimage (shifting the blame), and redemption.

problem (prescription), and the actions that the audience should take to address the problem (motivation). E. L. Collins et al. concluded that the model does not describe current practice and that activist organizations would benefit from using all four frames.

Reber and Berger (2005) examined the framing of three issues that appeared most often in 139 Sierra Club newsletters from 51 chapters. The researchers noted a lack of unity between the national and local newsletters. In addition, they noted that activist organizations should take advantage of tag lines that summarize issues. One such tag line is *smart growth*, which describes the Sierra Club's answer to sprawl (Reber & Berger, 2005).

Henderson (2005) and Seamon (2006) also studied environmental organizations' use of framing. Henderson studied a campaign against genetic engineering in New Zealand and discovered the use of three diverse frames that constructed multiple identities of the country. Seamon found that environmental activist organizations neutralize opponents' frames through co-optation.

In addition, Werder (2006) conducted an experimental design study to compare the persuasiveness of seven message strategies (including an eighth control strategy) by exposing participants to PETA literature about McDonald's and providing McDonald's messages. Regardless of the strategy, participants tended to evaluate McDonald's response based on whether they agreed with PETA's goals (known as *goal compatibility*).

Several scholars have studied the media to help advocacy organizations. In Yang and Mallabo's (2003) reputation study, they discovered that participants value the personal experiences they have with an activist organization more than they value the

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information that they heard about it through the media. Miller's (1995) study of a local and national steel strike demonstrated the importance of coordinating local and national media materials. Rauch (2006) found that although activists downplayed their use of mainstream media during interviews, their diaries revealed a diverse range of both mainstream and alternative media for news.

Some scholars have studied the communication that activist organizations use with their members. Nordhoff and Downes (2003) described internal communication between environmental non-profit agencies and their members. To mobilize political activity, the agencies emphasized personal contact through phone calls that they tailored to members' concerns. The activist organizations in Alex's (2003) study used online action alerts to engage people who would otherwise not make the time for activism. Guth and Marsh (2005) described the various tactics that AARP used to defend its backing of a controversial bill to its members.

O'Neil (2007) and Waters (2006) investigated donor relationships with nonprofit organizations. O'Neil found that the amount donors contribute does not correlate with the strength of the relationship they have with a non-profit organization. Instead, strong relationships correlate with years of financial giving to the organization, desire to continue contributing, and receptivity to encouraging friends to donate. However, Waters discovered that both repeat donors and major gift donors are likely to have a stronger relationship than other donors, as measured by the relationship outcomes of trust, satisfaction, commitment, and control mutuality.

Antecedents to Joining Advocacy Organizations

Some scholars have studied antecedents that predict a person's relationship with an advocacy organization. Dutta-Bergman (2004) identified psychographic variables that predict someone's likelihood of volunteering. He found that people who volunteer are more likely than their counterparts to exercise regularly, express concern for environmental issues, and be active consumers by expressing dissatisfaction with bad products. Women, in addition to people who are older and more educated, are more likely to be volunteers than their counterparts.

J. E. Grunig (1989) categorized antecedents for joining the Sierra Club by using Clarke and J. Q. Wilson's (1961) typology of material incentives, solidary incentives, and purposive incentives. *Material incentives* refer to tangible enticements that are often based on monetary value. For example, some people join organizations to expand their social networks, in hopes that they will produce a higher profit for their employers. *Solidary incentives* include intangible benefits, such as the status members receive by being group members and the enjoyment they derive from socializing. *Purposive incentives* are intangible benefits, which include the fulfillment that people receive from having helped an important cause, even if they only give by letting an organization use their names.

The participants in J. E. Grunig's (1989) study reported that they joined the Sierra Club to contribute to the cause. Thus, members in this case joined for purposive incentives, which relates to normative commitment. Participants did not find solidary incentives to be important to their reasons for joining, so affective commitment may develop only after joining an organization. Also, continuance commitment was not an

antecedent. Participants rejected material benefits as motivating factors, such as magazines and camping trips.

Wilcox and Cameron (2006) reported the findings of a Gallup Poll in their public relations textbook. According to the survey, 53 percent of respondents volunteer to help "the less fortunate" (p. 558). The second most common reason was experiencing personal satisfaction, followed by religious motivations.

Edwards (2002) studied Avon's breast cancer walk. Although Avon is a corporation, the activity resembles the charity walks that advocacy organizations commonly plan. Many participants she interviewed explained that breast cancer had affected themselves or their loved ones, which motivated them to participate in the walk. Thus, one can conclude that a person's experience with a social issue can catalyze their involvement in an advocacy organization's efforts. Other people joined the effort for camaraderie and friendship, personal empowerment, self-confidence, and to make a difference, which could be additional antecedents to entering a relationship with an advocacy organization.

Retention Challenges in Advocacy Organizations

In this section, I discuss the following retention challenges: alienation, member disagreement, racism, and sexism. Although researchers wrote about these challenges in the context of social movements and activist organizations, I argue that they also apply to advocacy organizations. Within this discussion, I describe solutions to retention challenges.

Scholars found that some activists end their participation in social movements because of negative reactions from spouses, friends, and family members (Aho, 1994;

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Ilsley, 1990; Nepstad, 2004). Billings (1990), in addition to Downton and Wehr (1991, 1997), stated that some activists counter negative reactions by shoring up their beliefs through humor, meditation, rituals, prayers, and group singing. A sense of community and friendships among members helps members counterbalance alienation. Participating in social movements is partially based on friendships within the movement (Gamson, 1992; Lo, 1992; Snow, Zurcher, & Ekland-Olson, 1980; Nepstad, 2004). Overall, participants in McAdam's (1986) study had a 25 percent attrition rate, although members with strong bonds had a 12 percent attrition rate. Barkan et al. (1993) stated that people with close friendships with activists and leaders tend to be more committed to a movement. According to Hager and Brudney (2004), volunteers who join organizations because other volunteers recruited them are more likely to stay in organizations.

Member disagreement can result in attrition. Guth and Marsh (2005) examined a case in which an activist organization's members disagreed. They described AARP's success in responding to a member revolt when the organization supported a controversial Medicare reform bill. On its Web site, the organization explained the legitimacy it had for the decision based on its surveys of members, phone calls with members, letters it received from members, in person meetings with members, and endorsement by its volunteer board of directors. To add credibility to the decision, it referred to reputable organizations that endorsed the bill. AARP's publicity of its rationale and decision-making process mended member relationships.

Some activist organizations have lost members due to racism, sexism, or both. Puck (2004) stated, "Most of the people of color I know who were once in the Earth First! movement have left – all citing reasons of racism within the scene." An executive

director of the Environmental Defense Fund admitted, "The truth is that environmental groups have done a miserable job of reaching out to minorities" (Shabecoff, 1990, p. A20). According to Hofrichter (2002), activist organizations should build multicultural, multi-issue, and international platforms that cut across gender, racial, class, and national boundaries. In addition, organizations can establish training and recruitment programs for diverse people, and they can require diversity on their boards of directors (Bascher, 2003; Tennant & Chandler, 2005).

<div align="center">Research Questions</div>

Four research questions were developed out of the literature and theory, which helped guide data collection and analysis.

RQ 1: What types of relationships exist between HAO and its members and former members?

Exploring the ways people make meaning of relationship types fulfilled the first goal of this study, and it was insightful for both testing and building theory about relationship strategies, which fulfilled the second goal. Existing relationship types include communal, exchange, covenantal, contractual, symbiotic, manipulative, and exploitative (Hon & J. E. Grunig, 1999; Hung, 2005b). Relationship types were interesting to explore in the context of an advocacy organization and its relationship to the people it seeks to liberate from institutional and cultural oppression. Due to the nearness between members and the advocacy organization's mission, a communal relationship appeared more likely than it might have been in a corporate context. If an organization's purpose is to uplift a class of people, one could deduce that the organization genuinely cares for this group of people. Scholars depict communal relationships as ideal (e.g., J. E. Grunig, 2002), so the

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opportunity to explore a scene that is particularly conducive to this relationship type appeared promising for delivering rich insights about why certain relationship types are perceived. Differences in perception about relationship types seemed probable, particularly considering the various social positions people occupy as staff, members, and former members.

RQ 2: How does HAO build relationships with members?

The second research question fulfilled the first goal of the study by asking staff members to identify the strategies they use to cultivate relationships with members. This research question was also intended to serve the second goal by producing new cultivation strategies. Public relations scholars (e.g., Huang, 1997; Hung, 2002; Jo & Kim, 2003; Ki & Hon, 2006) commonly identified the cultivation strategies that Hon and J. E. Grunig (1999) presented. People would not be surprised to find that an organization that allows a public to *access* it also uses *openness* by sharing its thoughts and feelings. All of these strategies would also be likely to be found in an organization that uses *symmetrical communication* by using *dialogue* to seek mutual benefit. Moreover, these strategies are compatible with the strategy of providing *assurances* that the organization values the public. *Assurances* could also be given by using *conflict resolution strategies* that prioritize keeping the relationship intact. Efforts to enhance the relationship, which could include the strategy of *task sharing*, would be encompassed in the strategy of *positivity*.

RQ 3: What are members' and former members' opinions about how HAO builds relationships with them?

The third research question connected with this study's first goal by examining relationship strategies from the perspectives of members and former members. Studying relationship strategies from publics' perspectives also served the second goal by seeking insight into the effectiveness of cultivation strategies. No public relations study has resulted in cultivation strategies that exclusively apply to advocacy organizations. This investigation contributes to the overall question of the extent to which relationship management differs for advocacy organizations (see Dozier & Lauzen, 2000 versus J. E. Grunig et al., 1992).

RQ 4: Why did members or former members decrease or end their participation with HAO?

The fourth research question fulfilled the study's first goal by identifying relationship stresses through the perspectives of the organization, members, and former members. Fulfilling the study's second goal, the study introduced the concept of *relationship stresses*, which opens up a new area of public relations research. Identifying relationship stresses was also intended to result in cultivation strategies for managing them. Relationship stresses could impede desirable relationship outcomes, such as goal achievement, co-production, retention, and a desirable reputation.

CHAPTER THREE: METHOD

I conducted a qualitative case study to identify the types of relationships HAO has with its members and former members, examine and assess HAO's cultivation strategies, and explore the factors that explain why members decrease or end their participation with the organization. In this chapter, I discuss qualitative research and case study methodology. I provide information about the methods I used for data collection and data analysis. The chapter concludes with a discussion about validity and ethical concerns, such as attempts to manage the power imbalance, to provide confidentiality, and to avoid harming the reputation of a vulnerable population.

Qualitative Research

Denzin and Lincoln (2000) defined *qualitative research* as "a situated activity that locates the observer in the world" (p. 3). They stated, "[Q]ualitative researchers study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meanings people bring them" (p. 3). One technique is to give participants some control over the research process (e.g., through research design, protocol, methods, analysis, and interpretation) (Fine, Weis, Weseen, & Wong, 2000). Another technique is to strive for situated, local understandings rather than universal generalizations (Fine et al., 2000). Qualitative researchers value emic portrayals by allowing participants to speak for themselves in studies and by preferring participants' nomenclature to their own (Wolcott, 1994). Ideally, researchers should provide enough evidence for readers to come to their own conclusions based on the data; however, space constraints often prevent scholars from achieving this goal.

Qualitative researchers desire diverse participants who are appropriate to the phenomenon and context they study (Miles & Huberman, 1994). Qualitative researchers look to situations and personal experiences to account for unusual answers (Guba & Lincoln, 1998). They seek multiple perspectives (Johnson, 2002).

Gubrium and Holstein (2002) explained that qualitative methods, such as interviews, involve cultural production because they generate meaning as opposed to only recording it. Qualitative researchers determine which information is most relevant and layer it with their insights (Gubrium & Holstein, 2002).

Qualitative methodology is more appropriate than quantitative methodology for answering the research questions in this study. This study is exploratory (see Marshall & Rossman, 1999). One of the goals of this study is to develop new territory in relationship theory. Not enough research exists to adequately achieve this goal through closed-ended questions (see Marshall, 1985).

Although qualitative research lacks objectivity, many qualitative researchers view subjectivity as an asset that actually increases the objectivity of qualitative research (P. H. Collins, 2000). Harding (1987) argued for subjectivity, stating that researchers disadvantage their readers when speaking as invisible authorities with hidden biases and interests. Haraway (1988) claimed that qualitative research gains objectivity when researchers limit conclusions to the natural contexts in which phenomena occur. She also stated that situating research in a limited context from a partial perspective makes conclusions intelligent and valid. Qualitative researchers who acknowledge their subjectivity increase the objectivity of their research by embracing the value of transparency and by thinking through how their identities and assumptions influence their

studies (Harding, 1987). When researchers explain their subjectivity, readers have increased capacity to interpret studies (Harding, 1987).

Explaining subjectivity involves reflexivity (Harding, 1987). Through reflexivity, researchers can avoid what Haraway (1988) described as observing everything without a location. Reflexivity involves writing oneself into the study instead of posing as an objective expert who does not influence the results (Haraway, 1988). Researchers can be reflexive by sharing their agendas and thoughts about how they influenced the research. The reflexive component of this research is presented later in this chapter.

Case Study Methodology

Case study methodology involves intense, extended contact with people to learn how they produce meaning in a particular environment from common situations (Miles & Huberman, 1994). According to Yin (1994), conducting a case study involves several steps. First, the scholar starts by establishing and defining research questions. The research questions identify the phenomenon studied and are rooted in the goals for the study. They also determine the methodological approach (e.g., quantitative, qualitative).

Second, the researcher selects the case and methods (Yin, 1994). According to Wolcott (1994), limiting case studies to one unit or "case" is an ideal case study approach. Studying more than one case rarely increases depth, and it often results in poorly contextualized research (Wolcott, 1994).

Third, the scholar prepares for data collection by designing protocols, by establishing data collection and analysis procedures, and by conducting a pilot study to correct problems, such as unclear questions (Yin, 1994). The researcher ensures that the protocols will result in answers to the research questions.

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Fourth, the scholar gathers data (Yin, 1994). Shifts in procedures could occur to improve the quality of data, and the researcher documents these changes. The scholar takes field notes to record preliminary observations and interpretations.

Fifth, the scholar integrates data from the various methods and analyzes the information (Yin, 1994). The researcher searches for alternate interpretations and could return to data collection to resolve discrepancies (Yin, 2003). According to Yin (2003), rival explanations hold particular value when they illustrate "plausible conditions or forces that might have produced the observed effect or outcome" (p. 122). Yin (2003) explained, "The better and more numerous the rivals that can be investigated in this manner, the stronger your case study will be – whether the bulk of evidence supports the originally hypothesized intervention or not" (p. 122). In addition, Yin (1994) recommended that researchers use a deep analysis of literature and theories to guide their data gathering and analysis.

Finally, the scholar writes a report of the findings in a way that is informative enough to allow readers to make independent interpretations. Researchers should demonstrate how the analysis was developed through consideration of relevant data. In addition, they should present compelling alternate interpretations for the reader to assess.

For the current research, a qualitative case study had advantages over other qualitative methodologies. A case study enabled an exploration into relationship theory from different sides of the relationship and from various perspectives on each side of the relationship, which is essential to the exploratory nature of this study's research questions. The open-ended nature of qualitative research allowed me to ask participants questions based on their initial answers, enabling a contextualized, in-depth

understanding of the utility of relationship theory and new insights. Also, by using multiple methods, this study benefited from the strengths of each approach and counterbalanced each method's weaknesses (Lindlof & M. Taylor, 2002; Miles & Huberman, 1994; van Zoonen, 1994). In addition, focusing this inquiry on one organization, as Wolcott (2001a) suggested, was conducive to achieving in-depth answers to the research questions.

<div align="center">Active Interviewing</div>

Although in-depth interviews are typical of case studies, I followed my colleague's (Tuite, 2006) lead by embracing *active interviewing*, as conceptualized by Holstein and Gubrium (1995). I chose active interviewing because it can be particularly conducive for building rapport, for identifying critical information, for digging deeply into surface answers, for testing rival explanations, and for making the process more meaningful to participants by ceding power (see Tuite, 2006). Active interviewing differs from conventional forms of interviewing because it strays from a strict question-and-answer format. Active interviewers have the option of responding to participants' answers by offering comments, such as empathic statements or helpful information, as opposed to only responding with follow-up questions and probes. Participants then react to an interviewer's comments, making the process more conversation-like than other interview methods.

Active interviewing shares many best practices with traditional interviewing. Active interviewers ground probes in contexts (Holstein & Gubrium, 1995). When probing different contexts, active interviewers ask participants to reflect on their answers to achieve depth (Holstein & Gubrium, 1995). Active interviewers also try to avoid

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pre-existing categories and interpretations (Holstein & Gubrium, 1995). In addition,

active interviewers pay attention to participants' body language, tone, and other signals

that suggest resistance to meanings, reconstitution of meanings, or both (Holstein &

Gubrium, 1995).

<div align="center">Document Analysis</div>

Wester (1995) explained that qualitative document analysis involves studying the

ways in which meaning is produced (cited in Dhoest, 2004). Altheide et al. (2001)

commented, "Although there are many differences in some of the [document analysis]

approaches, all share an assumption that symbolic representations are enmeshed in a

context of other assumptions that are not stated as such" (p. 309). According to Dhoest

(2004), qualitative document analysis is especially helpful for developing

"representational patterns and themes" (p. 395). In addition, Babbie (1992) commented,

"Content analysis …is particularly well suited to the study of communications and to

answering the classic question of communications research: 'Who says what to whom,

why, how and with what effect?'" (p. 314).

<div align="center">Participant Observation</div>

Participant observation consists of attending and analyzing social activities of a

person or group to gather research (Wolcott, 2001a). It often involves long-term

participation to achieve some degree of shared understanding with participants (Wolcott,

2001a). According to Bogdan and Biklen (1992), the amount of participation depends on

a researcher's identity, values, and personality. Lindlof and M. Taylor (2002) presented

five levels to describe the amount of participation that a researcher could adopt:

participant-as-observer, observer-as-participant, complete observer, active observer, and

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complete participant. The role relevant to this study is the participant-as-observer

category. In this role, the researcher acknowledges her identity as a researcher and

maintains a balance between participating in some but not all activities and routines.

People adopting this role believe that not participating would be at least as unnatural as

any other position, and they believe that participating lowers status differentials and helps

them understand the activities they see. Lindlof and M. Taylor (2002) recommended that

researchers identify participants' roles in a setting, the way a situation is organized, the

process for early interactions, and significant events. Researchers can use fieldnotes by

recording events, preliminary interpretations, and emotional reactions (Van Maanen,

1988; Spradley, 1979).

<div align="center">Strengths and Weaknesses of Chosen Methods</div>

Each method has strengths and weaknesses. An advantage of individual

interviews is that they enable researchers to engage in deep inquiries with participants

(Wolcott, 2001a). This advantage is a drawback of document analysis and participant

observation (D. L. Morgan, 1988). A benefit of document analysis is that researchers can

use it to study communication without influencing the production of it (Marshall &

Rossman, 1999). A researcher's presence influences the production of meaning during

interviews and participant observation, which is a weakness of these methods. A strength

of participant observation is that it allows researchers to witness naturally unfolding

events with minimal interference (D. L. Morgan, 1988). This strength is a weakness of

interviews. Using several methods is known as *triangulation*, which researchers

recommend for gaining the strength of each method while compensating for weaknesses

(Miles & Huberman, 1994).

Data Collection

In this section, I discuss the process for selecting the organization and the participants for this study. I address the interview process, in addition to recruitment, sampling, and access procedures. Next, I describe the participants in the study. I then describe the protocol. This discussion concludes with participant observation and document analysis procedures.

Organization Choice

To select an organization for this case study, I developed a list of advocacy and activist organizations that I knew. I added names of organizations my advisor recommended to this list. Next, I conducted an Internet search for activist and advocacy organizations. To reduce the list to one organization, I eliminated organizations with political philosophies that differed from my own, because I did not want strong differences in philosophy to cloud my ability to conduct research. Second, I eliminated organizations that engage in extreme tactics, such as vandalism and harassment. I based my final selection on an intensity sampling method by selecting a case with traits that would make it a strong choice for the research questions (see Patton, 1990; Wolcott, 2002). To identify a rich case, I examined the Web sites of organizations on my list, and I looked for sophisticated communication techniques[9] and a high activity level.

From this process, I identified my leading candidate. HAO's Web site easily exceeded the others in its content, layout, and opportunity for two-way communication. In addition, the Web site suggested a high level of member activity based on discussion boards and events. I also felt confident in this choice based on my experience with HAO:

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[9] The sophisticated communication techniques I looked for are described in the Web site discussion in chapter two.

For a previous class project, I interviewed two HAO leaders. Based on these interviews, I

estimated that HAO could use sophisticated relationship management practices (see J. E.

Grunig, 1992; Dozier, 1995; L. A. Grunig et al., 2002). I did not believe that the

techniques that I would learn about would necessarily apply to all types of advocacy

organizations; however, I thought that many of them would apply to ideologically

mainstream advocacy organizations that are simultaneously grassroots and

institutionalized through local affiliates, state organizations, and a national organization.

Interviews

I scheduled interviews based on times and locations that were convenient to

participants, such as private offices, empty conference rooms, and restaurants. For

participants who had their own topics they wanted to discuss with me (regardless of the

relevance to the study), we informally divided the conversation between our agenda

items. I conducted 102 interviews that ranged from five minutes in length to three hours.

The length depended on participants' answers, whether the interviews occurred toward

the beginning or toward the end of data collection, and participants' interest in talking

with me. Most interviews lasted an average of 40 minutes. Once I thought I had heard a

full range of answers to the interview questions, I started spending an increasing amount

of time on testing emerging themes. Toward the end of data collection, I only asked

screening questions to identify whether I was speaking with a former member (a difficult

person to recruit) or whether a person's initial answers suggested a difference from the

data I had collected. When answers to screening questions met neither criterion, I asked

participants if there was anything that they wanted to communicate to HAO and

concluded the interview. Of the 102 interviews, 21 were screening interviews that did not

develop into full interviews, and there were 81 full interviews. Interviews by e-mail occurred with 13 participants, interviews by phone occurred with 65 participants, and 24 in-person interviews were conducted. All interviews were audiotaped, although the recorder malfunctioned for four interviews, which resulted in a reliance on notes.

Recruitment, Sampling, and Access

Because I had previously worked with HAO for a research project, I already knew a staff member, who I will refer to as Evan. On August 17, I contacted Evan, described the study, and requested his help (see Appendix A). Evan later checked with other staff members in the organization and confirmed that HAO would work with me for this study. He gave me the contact information for one of the many people who specialize in membership in the organization. I will refer to this person as Andrea. Evan sent Andrea an e-mail of introduction.

I focused on one of HAO's state organizations, which will be referred to as Stateton, and the affiliates within it. Andrea selected the organization by choosing one that had particularly strong member retention, as defined by people continuing their participation in the organization within a one-year period. Thus, people who had neither paid dues within the year nor participated in a HAO activity within the year were classified as former members. I contacted the state organization via e-mail (see Appendix B) and scheduled a phone call with the executive director, who I will refer to as Ken. The state executive director was in the process of training his successor after several years in his role with HAO and more than 30 years in the particular health area. I interviewed Ken for nearly three hours.

With regard to recruitment, the state organization's staff members were consistent with Andrea's assessment of exceeding expectations. I sent the state organization a check for $500 and worked with a staff member who did a random selection of names from the database. I asked her if she could send $500 worth of mailings, including her labor for putting them together. She did not charge for her labor, and the state organization even contributed its own money to increase the number of potential participants. The staff member sent letters to 1,920 members and former members (see Appendix C for the letter). I had set up a toll-free phone number for potential participants to call, and most people from the state contacted me in this manner; some e-mailed. Although I preferred phone calls for the interviews and expressed this preference, I let people respond to e-mailed questions. Upon receiving the letter, some participants wrote an e-mail describing their experiences with HAO. Some agreed to answer follow-up questions via e-mail.

I started by interviewing a member of HAO National's senior management for three hours over a two-day period. Following our last interview, this person sent an e-mail to the national staff to recruit participants for me (see Appendix D). As I established a weekly presence at HAO through volunteer work, additional opportunities became available. HAO has regional leadership consultants who help HAO state organizations and local affiliates. One of the consultants was also completing a dissertation, which helped us have instant rapport and vibrant conversations about the dissertation process. She invited me to sit in on a monthly conference call for HAO's state executive directors. On March 8 at the end of the call, she let me explain my study and pose a few questions. The consultant subsequently e-mailed the group with three of my questions and allowed

the group to directly reply to me if interested. A copy of the e-mail appears in Appendix E.

In addition, a HAO National staff member offered to contact 10 people via mail who had served on the national Board of Directors and who had not been in contact with HAO National for a significant period of time. I prepared a draft of the letter, and the staff member finalized it and added a handwritten note to each (see Appendix F). Both outreach efforts enhanced the breadth and depth of the study. I also interviewed a few people who I met through HAO's awareness walk.

Participants

Most of the participants with whom I talked were Caucasian women. Seventy-five percent of participants were women, and 25 percent were men. Ninety percent of participants were Caucasian, including 68 women and 24 men. Five percent were African American, including two men and three women. In addition, five women of other races were interviewed. Most staff members were Caucasian, and most were over age 35. State and affiliate staff included 5 men and 12 women, and most were Caucasian. Members included 48 women and 10 men. Nearly a third of members who were interviewed were younger than age 35, and a little more than 10 percent were at least 70 years old. Former members in this study included 2 men and 3 women. Most former members who were interviewed were Caucasian and between ages 50 to 75.

I interviewed most of the national staff members who were based in my local area, including 13 women and nine men. Interviews were conducted with staff members from the following areas: communication, corporate relations, development, education,

finance, leadership development, multicultural center, policy, and senior management.

The table below lists the number of interviewees from each part of the organization.

Table 1

Number of Participants by Position

Role in the Organization	Number of Participants
National Staff	22
State Organization Staff	10
Affiliate Staff	7
Members	58
Former Members	5

Protocol

I developed a protocol of open-ended questions for the interviews and pre-tested

them. I conducted two interviews with friends about their relationships with advocacy

organizations. No changes resulted from the pretests. I organized the questions in the

protocol in terms of the research questions. RQ 1 is "What types of relationships exist

between HAO and its members and former members?" To answer this question, I asked

staff members whether they had gone beyond what was required of them to help

members and if so, why. I asked members and former members whether they thought

HAO genuinely cared about them without expecting anything in return. I asked

participants to explain the reasons for their opinions.

RQ 2 is "How does HAO build relationships with members?" Consequently, I

asked staff how they attempt to build relationships with members. In addition, I asked

staff how their communication materials build relationships with members. After asking

staff questions about the extent to which HAO attempts to achieve the relationship

outcomes of control mutuality, trust, satisfaction, and commitment, I asked follow-up

questions for each outcome, which captured strategies to achieve each one. I also sought

members' opinions to answer the second research question. I asked members how HAO

builds a relationship with them. I also asked them about the extent to which the

relationship reflects the outcomes of control mutuality, trust, satisfaction, and

commitment. Asking members how HAO achieved these outcomes resulted in cultivation

strategies. I also asked members about their opportunities for sharing ideas and feedback.

RQ 3 is "What are members' and former members' opinions about how HAO

builds relationships with them?" After members and former members discussed ways

HAO built a relationship with them, they were asked to assess the effectiveness of the

strategies they identified.

RQ 4 is "Why did members or former members decrease or end their participation

with HAO?" To answer this question, I asked members to describe their involvement in

HAO. When they indicated that their involvement had decreased or ended, I asked

follow-up questions to explore why. In addition, when participants offered negative

responses to questions of trust, control mutuality, commitment, and satisfaction, I asked

them to explain why and then asked whether their experiences affected their participation

level. Appendices G, H, and I contain interview protocols for staff, members, and former

members.

Participant Observation

The table below summarizes the participant observation in chronological order.

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Table 2

Participant Observation Responsibilities and Hours

Activity	Hours	Duties
Awareness Walk Preparation	5	- Solicited in-kind donations - Raised money as a walker
Awareness Walk Day	6.5	- Assisted with set up and take down - Photographed participants - Joined participants in walking
Post-Walk Office Work	18	- Managed donor records for local walk - Sorted records for regional walks - Listened to conference call to train walk organizers for next year
Holiday Office Party	1	- Joined HAO National in a celebratory lunch, where informal employee awards were given
HAO National All-Staff Meeting	1	- Listened to a meeting and was introduced as a volunteer and researcher
University Welcome Kit	10	- Rewrote a 23-page welcome kit for student-run university groups
Conference Call with Executive Directors	.5	- Listened to senior management's open meeting with state and affiliate leadership
Health Report	7	- Contributed to a media list and pitched the health report to the media

I completed 49 hours of participant observation from Oct. 29 to Feb. 26. When meeting

people at HAO National or the walk, I described my role as a researcher and volunteer. I

observed interactions at the walk among participants and between participants and staff. I

particularly enjoyed listening to the opening speeches. Following the walk, I helped

manage financial records from the walk and contacted staff members from different parts

of the country to complete missing information. I did not identify my status during this activity because our interactions were brief, my status seemed irrelevant to me, and the idea of announcing my status seemed pompous.

Document Analysis

Document analysis consisted of internal and external items, which are listed in the table on the next page. I reviewed academic articles and formal communication between HAO National and the staff at both state and affiliate levels. The two academic articles that I examined were written to find out whether HAO's education programs have lasting effects, with the overall objective of discovering whether HAO could justify appeals to receive the government's financial support for its programs. In addition, I examined several documents that HAO National sent to state and affiliate staff members. One of these documents was an unpopular and quickly defeated effort by a former HAO National leader to increase accountability in state organizations and local affiliates. Another one of these documents was a leadership conference report from 2005, which contained an extensive discussion of diversity outreach. Other documents to state and affiliate staff included guides for organizing a HAO walk and for starting an affiliate. Two videos were examined. Members show one of them to community groups while sharing their personal stories. The other video is for members, and it describes a comprehensive approach to achieving a healthy lifestyle. I also read a 2001 report of proposed improvements by the executive directors of HAO state organizations for HAO National to implement. Document analysis also included electronic communication, publications, and strategic planning documents.

Table 3

Items Used for Document Analysis

Type of Document	Document Description
Academic Articles	- Pilot Study of Effectiveness of a Peer-Led Program - Study of the Efficacy of a Peer-Led Program
Documents from HAO National to State and Affiliate Staff	- Accountability Proposal - Guide for Starting an Affiliate - HAO Walk Event Guide - Leadership Conference Report - Videos and Documents for Member and Community Education Programs
Document from State Executive Directors to HAO National	- Proposal of Improvements for HAO
Electronic Communication	- National, State, and Affiliate Web sites - Members' Web Sites for Awareness Walk - Weekly HAO National E-mails
Publications	- National, State, and Affiliate Newsletters - National Annual Reports - State Brochures - HAO National Convention Program
Strategic Planning Documents	- Bylaws - Strategic Plan - Strategic Planning Group Reports

Electronic communication included national, state, and local HAO Web sites (including discussion boards and a blog); weekly HAO National e-mails; and members' online walk pages. Publication materials included the past seven years of the national organization's quarterly newsletter; two state newsletters, and a small sample of affiliate newsletters. Two years of recent annual reports, state brochures, and a convention

program were also examined. The strategic planning documents provided historical

background, breadth, and depth.

<center>Data Analysis</center>

I abided by Yin's (2003) recommendation to structure the study within a

discipline's literature, and I followed recommendations provided by Miles and Huberman

(1994). In addition, I used some of Glaser and Strauss's (1967) approaches to a grounded

analysis of data. Although Glaser, Strauss, and Corbin were objectivists, many scholars

adopt a constructivist philosophy in their grounded theory analysis by embracing multiple

perspectives, voices, and interpretations in a contextualized way (Charmaz, 2000).

Yin (2003) offered various data analysis instructions for case studies. The

technique that is most feasible with this study is pattern matching. This technique

involves comparing data with theory. Researchers can also use patterns to develop rival

explanations for independent variables. Each explanation for a pattern is mutually

exclusive. Attempts can be made to rule out rival explanations.

Miles and Huberman (1994) also shared techniques for generating meaning from

data. One of their recommendations that is useful for case study research is to use

triangulation by comparing data from several sources. In addition, they advised

researchers to search for negative evidence and to explore outliers, which can result in

limiting generalizations and the effects of bias.

According to Glaser and Strauss (1967), open coding involves breaking down

data, comparing them, and placing them into categories. During open coding, researchers

conceptualize data as parts of large categories (Strauss & Corbin, 1990). Open coding can

occur by examining every line, every paragraph, or every document. A constant

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comparison method is used to develop the properties and dimensions of categories by identifying similarities and differences between them (Charmaz, 2000). In addition, properties are established by theorizing about the conditions where each construct emerges, conditions that maintain or change the construct, outcomes of the construct, and the relationship between the construct and other categories (Charmaz, 2000).

Another data analysis method from grounded theory is axial coding (Charmaz, 2000). Scholars use axial coding after open coding by drawing connections among categories (Charmaz, 2000). Subcategories are connected to their encompassing category by explicating the relationships among them (Charmaz, 2000). Researchers continue to develop categories' properties during axial coding (Charmaz, 2000).

I completed data analysis procedures on a computer, which allowed me to frequently reorganize and synthesize the data. I engaged in line-by-line open coding with the interview transcripts. I examined each sentence for themes that answered the research questions (see Glaser & Strauss, 1967). Following Wolcott's (2001b) advice, I started with a few categories that facilitated the sorting of data. Every time I found a theme, I went to a data analysis document I created, which listed each research question. When I found themes during open coding, I copied an excerpt from the transcript and either placed it in an existing category or created a new category. When producing a new category, I included an excerpt that represented the category and labeled it with a phrase. As the data analysis document grew in length, I began collapsing categories and producing subcategories within each research question. The most challenging part of the process was attempting to develop properties of the categories (see Charmaz, 2000). I usually did not think I had compelling data to account for the various ways people

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produced meaning. Axial coding was helpful by clarifying categories and by improving the organizing scheme. Identifying differences among categories and their relationships to one another produced new, encompassing subcategories that were clearer than previous schemes. After open coding and axial coding, I tested patterns by looking for negative evidence and by attempting to account for differences. I also engaged in pattern matching by comparing results to existing theory.

Themes were either revised or fortified by turning to data from participant observation and document analysis (see Miles & Huberman, 1994). Field notes were primarily used to verify and challenge the analysis produced by the interviews, and they sometimes resulted in adding probes to subsequent interviews. For document analysis, I reviewed the organization's Web sites to provide a foundation of knowledge before the participant observation and interviews. In addition, I engaged in line-by-line coding of text from the current year's issues of HAO magazines and newsletters, and I integrated the resulting data into the emerging results. I examined all other documents by searching for data that fortified or challenged the emerging analysis I had produced from the interviews and participant observation. Document analysis was particularly helpful for representing a wider range of experiences than the interviews produced.

<div align="center">Data Selection for Results Section</div>

After analyzing the data, I had to make choices for what would be presented in the results section of this dissertation. One decision I made was to omit personal anecdotes that had little to do with the organization, the research questions, or the relationships recorded. Additionally, the personal quotes omitted might have unnecessarily harmed some participants. These quotes included individual-to-individual hurtful comments.

Researchers must determine whether the significance of knowledge justifies the disclosure of potentially damaging stories (Kvale, 1995; Weinberg, 2002; Wolcott, 2002). Miles and Huberman (1994) commented, "Field research can, at bottom, be considered as an act of betrayal, no matter how well intentioned or well integrated the researcher. You make the private public and leave the locals to take the consequences" (p. 265). Similarly, Wolcott (2002) stated, "You can be ethical or you can conduct social research. You cannot do both" (p. 145). Other researchers emphasize the importance of acting responsibly during qualitative research. For example, H. J. Rubin and I. S. Rubin (1995) discussed the centrality of ethical obligations throughout qualitative research. Lindlof and Taylor (2002) referred to Punch's (1986) work and explained that researchers should focus on their motivations for crossing ethical boundaries and the consequences of their actions.

Lindlof and Taylor (2002) stated, "When it seems likely that a course of action will injure participants or spoil the field for future researchers, fieldworkers should *always* take the higher road. In this enterprise, we serve at the pleasure of a group's membership, and our ends do not justify our means" (p. 141, italics in original). They added, "When we fail [to protect participants and the field], the consequences for our personal careers, our employing departments and institutions, our profession's reputation, and our participants' trust can be both deep and lasting" (p. 141). Punch (1998) described a case in which scholars protested someone's study for its potential damage. Moreover, Ellis (1995) determined that the knowledge produced from her study (see Ellis, 1986) was neither worth the cost of sullying the field of research in the eyes of the community she studied nor the cost of harming her participants' personal lives. Wolcott (2002)

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withheld information that seemed less relevant to his study; for example, he followed Brad's wishes by omitting information that would not make Brad look cool, while noting to readers that he did so. Abu-Lughod (1993) explained to readers that she exercised judgment by primarily following her vision, while occasionally fulfilling participants' requests for omission, such as withholding a wedding rhyme that participants viewed as disrespectful of the Egyptian president. However, breaking trust and breaching confidentiality agreements is sometimes justified. For instance, Vaillancourt and Igneski (2006) asserted that researchers should breach trust when reporting information could prevent harm to other people's lives.

Thorne (1988) defined the differences between a researcher and the political activists in his study:

> Although I believed in the goals and basic ideology of the Resistance, and acted as a sincere participant, my loyalty was qualified by four undeniable facts: I had an outside allegiance and tie; I was keeping records …; the records … would go into a report on the Resistance made available to outside audiences; and I expected to receive external rewards (a Ph.D. and publications) from my participation in the movement. (p. 229)

Thorne concluded that her researcher status impeded a complete commitment to the movement. Emerson (1988) referred to a recommendation by Douglas (1976) to avoid studying phenomena that can be too emotionally involving for the researcher. Thorne commented, "[A]cademic careers tend to encourage investment in the status quo, and … foster individualism instead of collectivism – they run counter to the commitments and

actions basic to radical politics" (p. 231). Thorne also referred to a double consciousness that emerged when frequently shifting between the roles of participant and researcher.

Weinberg (2002) stated, "[I]n evaluating the conflicting needs of different participants, the researcher should assign very high priority to the needs of the most disadvantaged in determining which route to take" (pp. 93-94). In addition, Weinberg noted that everyone's needs should be simultaneously considered. She noted that weighing potential costs and benefits involves scrutinizing the situation.

Weinberg (2002) discussed the challenge of critiquing an agency while expressing care and respect for its work. She noted, "This kind of dilemma is exacerbated in organizations that are nurturing and warm" (p. 86) (also see Stacey, 1991). Weinberg discovered information that could result in an agency for teenage parents losing its license. After Weinberg shared the results with the executive director, steps were taken by the agency to fix the breach. Weinberg eased the discomfort she faced at the time by turning to Klein's (1983) discussion of a dialectical relationship. Weinberg described a dialectical relationship as a partnership between parties in which a new synthesis of understanding results from a conversation about differences in opinion between the researcher and participants. Experiencing the relationship involves an interactive relationship and critical subjectivity by all parties. In the process, *consciousness-raising* occurs from sharing private stories and common threads between the stories. The dialectical relationship results in consciousness-raising for both the researcher and participants.

In some cases, however, participants can disagree with the critique and discard the opportunity for consciousness-raising. Bloor (1988) asserted, "[M]embers'

pronouncements on findings cannot be treated as a test of validity" (p. 172). Instead, he argued that disagreement should result in reanalyzing the data for deficiencies. When deficiencies cannot be found, the disagreement can extend the researcher's critique. Bloor explained, "By attempting to incorporate members' caveats and criticisms into a reworked analysis, the researcher may broaden his or her analysis" (p. 172).

As with all qualitative studies, some data had to be omitted here to present an organized, readable results section. However, the omissions were irrelevant to the research questions. Consequently, the omissions had no impact on the study. However, the issue of deciding what to omit is always present for studies, especially when the dilemma of revealing information is difficult to resolve. Transparency of procedures lends credibility to scholars (Kvale, 1995). This concept refers to not only transparency of data but also transparency in what the researcher did to gain results and interpretations. Including here what I selected to omit is part of the transparency necessary for judgments about this study.

Validity

In qualitative research, validity refers to investigating the phenomenon a researcher intended to explore (Kvale, 1996; H. J. Rubin & I. S. Rubin, 1995).

Saturation is one way in which this study is valid. Saturation was achieved in this study by reaching a point in which no new themes emerged (see Glaser & Strauss, 1967). Lindlof and Taylor (2002) explained that saturation occurs when participants' actions or meanings no longer surprise the researcher. Although Seidman (1998) did not quantify a typical number of interviews for saturation because funding and time constraints often prevent someone from reaching this point, Douglas (1985) estimated that a common

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point of saturation is about 25 interviews (cited in Dunbar, Rodriguez, & Parker, 2002). This study included 81 full interviews and 21 screening interviews. The abundance of participants and the data from each person counterbalanced the influence of any one story.

Validity was not only achieved by passing the saturation point, but it was also realized by following Kvale's (1995) instructions for *quality of craftsmanship*, which refers to conducting a sound study from start to finish. To uphold this standard of validity, I aligned the topic, purpose, research design, and methods. In the conceptualization, I conducted a deep review of literature that relates to the research questions, which built a sturdy ground for the study (see Denzin & Lincoln, 2000; Kvale, 1995; Yin, 2003). I triangulated methods, which also enhanced validity (Miles & Huberman, 1994). As far as finances and other constraints allowed, I collected data from a full range of respondents over time (a three-month period), which is suggested by Miles and Huberman (1994). Also, interview questions were open enough that participants' meanings could emerge (Seidman, 1998). During interviews, I conducted member checks by testing emerging themes with participants, which often resulted in limiting generalizations (Miles & Huberman, 1994). I pursued surprising evidence, sought negative evidence to discount emerging themes, and asked questions to eliminate coincidental relationships between data (Miles & Huberman, 1994). In addition, I compared interpretations with possible biases and assumptions, which were recorded in my notepad (see Kleinman & Copp, 1993). For example, one of my greatest concerns was being blinded by my loyalty to HAO National. One of the ways I checked this concern was by taking instances of people who had negative experiences with HAO and

ensuring that I represented the meaning they produced in each research question. I avoided fallacious logic by guarding against hasty generalizations and straw arguments (Kvale, 1995). These steps produced a strong quality of craftsmanship.

Reflexivity

The way a researcher interacts with participants and the way she positions herself influences the data collection and results (Marshall & Rossman, 1999). In this section, I discuss my orientation to the study and how I believe others perceived me so that readers can keep this in mind when considering the results. An important part of my subjectivity came from the time I spent volunteering for HAO National. I believe that my volunteer work provided a foundation of trust with the national staff members based on my commitment to the organization and my cheerful, non-antagonistic nature. Just as I think that I established initial trust with them during this period, they also convinced me of their kindness, integrity, hard work, and dedication to their supporters and the cause.

Throughout my volunteer work, I received an abundance of positive reinforcement, which made me want to spend even more time at HAO. The words of encouragement and personal relationships that developed during my volunteer work made the experience fulfilling and one that I would have wanted to do regardless of the research project. Spending time in the field also helped me learn popular HAO lingo, such as signing off e-mails (particularly ones around the awareness walk period) with "Walk on!"

Time played an important role in this process, and I enjoyed getting to know some of the national staff members on a more personal level by learning of their interests and hobbies outside of the organization. This experience, combined with the interviews I

conducted with the national staff, provided me with faith in the people behind the national organization.

In some cases, I promoted offerings by the national office. For example, a participant I will refer to as Duncan said that the national organization needed to address a certain issue[10]. He did not know that HAO was sponsoring a major event on this subject. From what I could tell, HAO only seemed to promote the event through its Web site and possibly e-mail. Given that most participants in this study did not access the Internet, I was not surprised that Duncan did not know about it. I registered him for the event (the registration was coordinated online), and he later told me that he greatly enjoyed it. In another case, a woman wanted an online forum for discussing health issues. She had Internet access and was comfortable using the Internet (an important difference based on my research), so I directed her to the discussion groups area on the national Web site, which she did not know about.

I believe that most people perceived me as young, cheerful, and pro-HAO. The national staff had seen me in the office regularly for two to four months, so we were familiar with one another. Nearly all of the staff members seemed to trust me based on the fact that they revealed sensitive information. One interviewee seemed guarded and uncomfortable with the interview, so I was careful to keep the discussion positive and not probe for negative answers.

<div align="center">Power</div>

During my training as a researcher, I have learned that there is always a power imbalance between the interviewee and the person with the pen. In addition to allowing

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[10] Details are omitted to protect the participant's identity.

HAO staff to redefine parts of this study's framework (which was of mutual benefit), I made other attempts to reduce the power imbalance between participants and myself. I treated HAO staff and members as the experts of their situation, which they are. I exhibited an empathic orientation throughout the data collection and analysis process (see Kong, Mahoney, & Plummer, 2002; Reinharz & Chase, 2002). I also used mutual dialogue to make each interview more of a balanced conversation rather than a series of questions and answers (see Naples, 2003). A power imbalance existed despite these attempts; however, I believe my efforts helped the situation due to the rapport and ease of conversation that I perceived.

<div align="center">Confidentiality</div>

Confidentiality was one of the most challenging areas because I needed to decide how much information I could include about someone without that person being identifiable. Following the Institutional Review Board (IRB) guidelines, I did not recruit members directly, and I kept participants' identities confidential. The hardest part was internal confidentiality: deciding which information to omit so that people within the organization would not be able to guess each other's identity. I was influenced by Ellis' (1986) discussion of how damaging research can be to participants' lives when they read someone's accounts of themselves and their community members. I have done my best to express heightened sensitivity to the responsibility of doing no harm (see Bowen, 2005). I excluded interesting information that was so unique that I believe it would have identified people. In other cases, I was vague and omitted vivid details. There is always a risk that a researcher will inadvertently share information that suggests someone's identity. I have tried to avoid this. All names in this study are pseudonyms.

An IRB requirement is to avoid harming a population's reputation or livelihood. This was especially relevant to this study because I worked with a vulnerable population[11]. The fact that the organization has an advocacy network for combating negative cultural portrayals of people with a particular type of illness is further evidence that I needed to be especially careful in my writing. I have done my best to not harm the reputation of the people I interviewed by reviewing statements for their potential to provoke stereotypes.

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[11] Although the organization did not want to be identified, I have permission to describe it as a health advocacy organization and to include references to diagnoses, doctors, illness, and stigma.

CHAPTER FOUR: RESULTS

The purpose of this chapter is to present the answers to the research questions. When possible, the subheads in this section are based on terms commonly used in the literature to illustrate the connections and departures from existing knowledge. Participants' words, the emic part of the results, are included beneath each subhead.

Organizational Atmosphere and Culture

Before responding to the research questions, I address the organizational atmosphere and culture that I experienced at the grassroots level and at the national level.

Grassroots Level

My strongest exposure to the grassroots level came from my involvement in HAO's awareness walk, which occurred on the National Mall on October 29. The morning was brisk. Volunteers scattered on the National Mall to set up registration tables, signs, maps, video cameras, and refreshments. Most participants arrived wearing team shirts over turtlenecks or long-sleeved shirts and gleefully conversed with their teammates. There was a strong sense of team spirit at the walk. A handout given prior to the walk contained tips for helping teams "STAND OUT." One tip encouraged team members to have a creative shirt, while noting that bland team shirts were better than not having team shirts and that people usually improve at shirt design with each year. A team of young adults arrived wearing puffy-painted headbands and matching shirts to honor a woman's brother who died from the illness. In the weeks leading up to the walk, HAO sent an e-mail to walk participants in which the woman shared her tragic story.

A handful of individuals appeared to unofficially act as the organization's ambassadors by greeting the seemingly few people like myself who arrived alone.

Questions of newcomers included whether the person was a family member or consumer and what the person's or family member's diagnosis was. This was followed by the greeter's story, which was – in every case I experienced – heartbreaking. Despite the sad stories, the storytellers seemed stable and calm, as if they had told the story many times and had worked through the grief of it. I felt deeply moved by their strength while responding with sympathy and attempts at comforting words about social change. One greeter joked that to some degree, there is an unacknowledged competition to see who has suffered the most.

A kickoff performance by cheerleaders and a high school band suggested the community's support for HAO and its people. Speeches followed about stigma, and the audience contributed empathic and cheering sounds. When the walk started, some people walked in silence while others chatted with teammates. At the end of the walk, many people lingered for the next 15 minutes to talk. Some participants played with their dogs.

National Level

When I entered the lobby of HAO National for the first time, I felt impressed. Artwork by a famous person with the illness was displayed, in addition to prestigious awards. Copies of the organization's glossy quarterly magazine were available for people to peruse as they waited on the couch. A large conference room could be seen, in addition to large letters representing the organization's name on the wall. On my first day of volunteering in the national office, I needed to sign in and wear a "Visitor" badge. Streaming videos from various parts of the national office appeared on monitors behind the receptionist's desk, although I never noticed video cameras in any part of the one-floor office. Keys were also needed to access the bathrooms, suggesting a high amount of

security. Once I started coming to HAO regularly, I no longer needed to sign in or wear a "Visitor" badge. Employees greeted me by name when they passed my desk. The atmosphere felt warm and supportive. At the holiday party, people rearranged their seating at tables to make room for me and quickly involved me in conversation. I experienced a strong sense of inclusiveness and belonging.

RQ 1: What Types of Relationships Exist Between HAO and Its Members and Former Members?

Staff members indicated a communal relationship, and members and former members perceived a communal relationship. Members also perceived an exchange or contractual relationship. A former member experienced an exploitative relationship. Members primarily evaluated their relationship type through their interactions at their HAO affiliate, and some referred to the state staff. People expressed hesitancy about judging a level of the organization without working with it closely. When I shared this theme with Benjamin, a national staff member, he stated: "It all makes sense. I think a lot of people develop a sense of trust at the local level." In this multi-tiered organization, member relationships are primarily built at the local level. Each relationship type is presented below with justifications for it.

Intended Communal

HAO intends a communal relationship with members and former members. People can receive most of HAO's services for free, regardless of whether they are members, such as assistance from a telephone helpline, educational classes, and support groups. One exception is HAO's annual national convention. HAO charges for attending the convention to cover the costs of renting convention space and organizing the

program. Even when people stop paying dues, HAO tends to continue sending publications out of genuine concern. Amber, of HAO National, explained, "You don't stop getting stuff from us. …[W]e don't believe that people stop needing us just because they don't pay dues." In some cases, HAO affiliates (which often have a comparatively small operating budget) eventually remove people from their mailing lists when they lack the money to cover the cost. Consequently, HAO communicates its genuine concern for members and former members by offering unconditional care to people before they join, while they are members, and after they leave.

Staff also genuinely care for members and former members due to their devotion to people whose lives have been touched by the illness. Ken shared, "This terrible illness has affected me from childhood, and therefore, at a fairly young age, I knew that… I could not abandon the people whose lives have been invaded." During participant observation, I worked with many staff members who were consumers, family members, or both. Many staff members' personal experiences inspire their genuine commitment to people with the illness and their families, regardless of people's abilities to reciprocate.

Perceived Communal

Most interviewees, including former members, perceive a communal relationship. Participants explained that HAO helps them without demanding anything in return. In addition, they stated that HAO has an organizational culture of genuine concern. Some participants said that they believe HAO genuinely cares for them because of staff members' personal connection to the cause and because of their hard work for the cause. In addition, HAO convinced members of its genuine concern by providing positive feedback and by advancing members' personal interests.

Giving Without Strings

As proof that HAO genuinely cares, numerous members and some former members said that the organization asks nothing of them while giving abundantly in return. Kristen said that HAO cares about her because she only had a dollar when she joined, and HAO never asked for membership fees since then. Furthermore, she explained that they never said, "Oh, okay, this week you have to go here and spend at least 15 hours for your dues and walk up and down the street with a poster." When asked how that made her feel, Kristen replied, "It's ready and available for when *you're* ready to use it. They're not pushing you, you know, for their satisfaction." Giving without strings attached convinces numerous members that HAO genuinely cares for them.

Culture of Genuine Concern

Many members explained that HAO genuinely cares about them by establishing a culture of genuine concern. Kate said that HAO makes her feel comfortable by providing a stigma-free environment where information sharing and friendships are encouraged. She concluded: "[HAO] people *really* care for and about each other." Based on HAO's culture of genuine concern, several members perceive a communal relationship.

Personal Connection to the Cause

Some members believe in HAO's genuine concern because many staff members have personal connections with the cause. Erin confided, "A lot of [HAO] is consumers and family members… I think people care, and I think it's because of the personal connection." When people know of staff members' personal connection to the organization's cause, they may conclude that the staff members genuinely care for all people affected by the particular kind of illness.

Fervent Work for the Cause

In addition, staff members' hard work convinces some members of HAO's genuine concern. Alisha explained, "[Ken] has been extraordinary. … He has really worked hard." The biggest goal for Stateton, as expressed by most participants, was passing a bill to help pay for medical costs. Leslie stated, "For us, the biggest problem has been health insurance." Following participant interviews, the state legislature passed the desired bill. The home page of Stateton's Web site featured a picture of Ken and other HAO staff members with the governor signing the bill. In addition, Ken took the state organization's budget from a deficit to a budget of $2 million, which ensures HAO's ability to provide education, personal assistance, and lobbying in the state. A staff member's hard work can demonstrate genuine care.

Assurances

Some members told me that HAO cares because it expresses appreciation and enthusiastically encourages participation. Marissa stated, "Whenever I see the leaders of the group, they're always praising my efforts and inviting me to come to the meetings." Giving people positive feedback and inviting them to work more closely with the organization makes some members perceive a communal relationship.

Advancement of Members' Personal Interests

A couple members expressed that HAO cares for them because of its efforts to advance their personal interests (as opposed to only advancing shared interests). Sarah has a physically demanding job, which has been more difficult with age, and she is pursuing a career as an author. She believes that HAO "definitely" cares for her. She explained, "They've been generous with mentioning the book in the newsletter. They're

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very supportive, very encouraging. They haven't even seen the manuscript for [my book], and they're thrilled." One way members perceive HAO's care is by experiencing HAO's enthusiastic support for their interests.

Perceived Exchange

Some people who expressed strong themes about advocacy perceive their relationship with HAO as a partnership based on exchanging resources to achieve a shared goal of social justice. Douglas, who says he entirely evaluates HAO based on its advocacy achievements, offered this answer when I asked whether he thought HAO genuinely cared for him: "Not really. We're just little spokes in the wheel." He said that in return for information, HAO expects him "to be active," which could include financial support and volunteering. Thus, some members view the relationship as a partnership for a shared goal.

Other Perceived Relationships

One former member expressed a contractual relationship with HAO because she believes that the relationship is based on a formal agreement of each party's responsibilities to one another. Danielle, who has not participated in meetings for a year, stated, "I don't know if I'm an actual paid member of [HAO] or not." She then concluded she must be: "I still get their newsletters, so I must be – still a member of [HAO]." However, HAO sends newsletters to Danielle regardless of whether she pays dues.

A former member perceives an exploitative relationship because her affiliate did not fulfill its promises. Candace described her attempt to get support from HAO one year ago. After attending one class of an educational program, the affiliate cancelled meetings without notice. She showed up to a locked door without a note. She wrote, "They lost

their chance for helping me, because I felt when I needed the most support, they were not

there. If you will also tell them for me to *quit* sending me info, it would be greatly

appreciated."

The state organization controlled the membership lists, so I contacted Alex, a state

staff member, and asked for Candace's name to be removed from the membership list.

Alex did this and explained that she notified Candace's affiliate of why she was removing

Candace's name from the list. According to Alex, the affiliate president explained that

the previous affiliate president struggled with an illness, which affected her ability to

perform her role[12]. Alex stated, "She was going to contact [Candace] but did not think it

would do any good because of [Candace's] vocal positions repeatedly expressed."

RQ 2: How Does HAO Build Relationships With Members?

HAO's cultivation strategies can be understood in terms organizational

management strategies and interpersonal strategies. In addition, HAO uses several tactics

for cultivating relationships. It has educational programs, meetings, events,

communications, grants and scholarships, and coalitions. Communications include

informal communications, magazines and newsletters, electronic communications,

surveys and conversations for feedback, conference calls, and speeches. HAO layers its

efforts with tactics for cultivating relationships with diverse populations, such as having

multicultural symposia, multicultural messages in publications, a multicultural center

newsletter, a Latino newsletter, articles about African Americans in HAO National's

magazine, and scholarships for diverse members to attend leadership meetings.

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[12] I also spoke with many consumer staff members and one consumer affiliate president who did an exceptional job with their work. Severe illness, like any severe life challenge, can affect people's work performance; however, many people learned to manage it and displayed effective leadership.

Organizational Management Strategies

Organizational management strategies include capacity building at the local level, delivery of core services, and structure for shared control over decisions. HAO also makes promises, keeps them, and guards against over-promising.

Capacity Building

During participant observation and through interviews at every organizational level, I documented HAO's attempts to cultivate relationships with members by building capacity at the local level. *Building capacity* refers to strengthening an organization's ability to accomplish its mission. In this case, building capacity at the local level includes establishing templates for the affiliate level to educate members, engage members in fundraising events, and attract volunteers. Instead of focusing on the national or state levels, the organization drives resources to the local level and relies on the local level to do the heavy lifting in cultivating member relationships. Alex, a state staff member, stated, "[HAO's] philosophy is that the strength is in the affiliates. …So it's not at all like big brother. It's sort of like mom." HAO invests in the affiliates to boost the affiliates' abilities to cultivate relationships with members.

Roger, a staff member from an urban affiliate outside of Stateton, explained the logic and advantages of cultivating relationships at the local level. After more than 30 years in the field in his city, he has developed personal relationships with department chairs at the medical universities in his city, directors of major community agencies, public providers, and insurance companies. Roger stated:

> If there is a problem in accessing services for an individual… it is highly likely
> that I have a personal relationship with someone who can break down… existing

barriers. If I don't have this – I know who does! Such is the nature of how things

are accomplished in a large urban area. It may take me a few e-mails or phone

calls – but I will get some satisfaction for the individual in need. …This is not

something that [HAO] National or the state [HAO] organization could duplicate.

Leveraging personal connections with local powerholders is a primary advantage that

affiliate staff have for cultivating relationships with members. Affiliate staff explained

that they are in the best position to fulfill most people's reasons for coming to HAO, so

they are also the optimal focus for cultivating relationships between members and the

organization.

A primary way that HAO cultivates relationships through capacity building is by

having four leadership consultants. The consultants are assigned to geographic regions of

the United States, and one consultant also covers the HAO in another country. The

consultants serve the HAO organizations in their region, including the state and affiliate

levels. A main responsibility of leadership consultants is to resolve problems (e.g.,

arguments, financial crises) that burden HAO's relationship with members.

Delivery of Core Services

To cultivate relationships with members, HAO does an excellent job of giving

members what they seek. Amber shared:

The real secret is giving people the opportunity to have what it is that they came

looking for. They came looking for a safe place to share their stories, to fight the

system, to learn more, so you want to provide as many opportunities for people to

do that in a way that feels friendly and safe and like you're home.

HAO cultivates relationships by fulfilling members' purpose for joining it.

Shared Control Over Decisions

HAO cultivates relationships with members by sharing control over decisions. One way this is done is through decision-making structures. Members have formal power in the organization by serving on advisory boards and the national board of directors, electing the national board of directors, submitting resolutions and bylaw changes, and voting on resolutions and bylaw changes. Amber commented, "Because it's such an open process, one member making a lot of noise can generate all sorts of activity." HAO cultivates relationships by formally giving members power in the organization.

Promise Making and Promise Keeping

Many staff members discussed the importance of both making promises and keeping promises to earn trust. An important corollary to this strategy is to not over-promise. Tom said to build trust, HAO follows the guidelines of "not promising anything you don't deliver, but then promising some things and delivering them." For example, HAO changed a drafted introduction to one of its reports by giving a wider window of when the next report would be produced.

In addition, HAO has shown its dedication to keeping promises by following its own rules, even when doing so results in logistical challenges. At the national convention, members from a California affiliate proposed a resolution at the convention to change the explanation of the organization's name. In a lighthearted tone, Amber recounted, "I was one of the people who was like, 'No! Please! Does anybody have any idea how complicated this is?'" Laughing, she said, "Doesn't matter… Membership's job isn't to worry about how complicated it is." HAO continues to receive resolutions at its annual convention, suggesting that people trust the process for voicing their requests.

Diversity Strategies

HAO National has a multicultural center to help it cultivate relationships with members who are diverse through race and sexual orientation. According to an issue of the multicultural center's newsletter, the center strives to engage diverse communities and "give them the tools and support necessary to advocate for meaningful access to treatment and the good quality of… health care that they deserve."

The multicultural center has leadership groups of and for African Americans, Asian Americans, and Latinos. Adriana initially tried a formal advisory board that included people from all priority groups. She commented, "It worked for a year; after that, people just dropped off. …Nobody would join the [conference] calls." Adriana reported that the separate groups have been working in terms of participation. Adriana provided several examples of taking requests from the task forces and delivering on them. For example, she explained that the Latino group told her, "We really need a publication, a newsletter, or something that we could use," which resulted in HAO's Latino newsletter.

I asked Adriana whether HAO did outreach to the American Indian and gay and lesbian populations. She said that these were groups for which HAO is starting to develop outreach efforts. She stated, "We're going to meet with an American Indian organization in the summer – see how well we work together." Adriana hopes to identify people at the meeting who would work with her on American Indian representation in the health movement. Regarding the gay and lesbian population, Adriana announced:

I am already planning… a gay and lesbian event. … This last year, we created a

resource section for a gay and lesbian group. Next year, we'll try to expand that.

Same model. Create a leadership group. That's our next target community.

Thus, HAO's efforts to expand its diversity outreach to the American Indian and gay and

lesbian populations are underway.

An important way to cultivate relationships with diverse members is to set aside

organizational resources for it. The former executive director of HAO National

established diversity as an organizational priority and demonstrated this by hiring people

to realize this vision. Amber commented:

If you say something is important, you have to dedicate something to that or at

least dedicate a big chunk of your time. Otherwise, it's just one in a million things

that you're doing, and it gets lost and doesn't send the message that this is really

important.

The current executive director has upheld diversity as a priority by continuing to dedicate

significant financial resources toward it. Adriana stated, "Even when we were in that

[financial] crisis, they made a priority for the [multicultural center]… [Other HAO

departments] had a big layoff." Some affiliates also demonstrate an organizational

commitment to diversity. Based on an article in Stateton's magazine, an affiliate has a

Hispanic/Latino program coordinator who has been successful in helping her affiliate

cultivate relationships with Hispanic and Latino people in migrant camps.

HAO National also has an organizational management strategy for selecting

affiliates to help with multicultural outreach. When I asked Adriana how she decides

which states and affiliates to work with due to time constraints, she presented an analogy

for her strategy. She stated, "I had a professor of mine. He would have a drawing. He used to say, 'We have two options. Trying to fight people you'll never change and trying to focus on people you might change.'" She then presented her professor's analogy, which guides her today:

> You're going to a prom. You have people who are on the stage. You have the band here that is playing. And you have people who are first row, dancing. You don't have to worry about them. They are already sold on your idea. Then you have people who are sitting on the side. They are not sure whether they want to join in the dance or not. And then there are people outside the dance floor: Don't even look at the ones outside. They're not even coming in. Focus on the ones that are sitting on the sides, deciding whether to dance or not. … If a lot of these people on the sidelines join us, eventually the group outside should be smaller and realize, "Oh, we better get inside."

Adriana gives priority to affiliates who express interest in diversity initiatives, rather than focusing on affiliates who are running with their own plans or affiliates who do not express interest. Adriana incorporates messages about diversity in HAO's materials, and she noted that directly working with affiliates who are uninterested would be a bad investment of her energy.

Adriana also presented a temporary transition strategy for cultivating relationships with diverse populations. She said that right now, some diverse populations do not feel like existing HAO affiliates serve their needs. She explained, "If I'm a Latina person and I actually go to an affiliate where I don't feel welcome, where I don't see anyone like me, I just won't bother going back. So sadly, we are losing people who go to meetings and do

not go back, and I can't blame them for that." Consequently, HAO enables diverse communities to establish their own affiliates when existing ones do not meet their needs. She stated, "In California, there are at least two Asian affiliates. In Boston, there's an African American affiliate. In Georgia, there's a Latino affiliate… Some get so big that they expand and want to include people of all backgrounds." HAO affiliates sometimes exist in the same community due to preferences for having separate organizing places. Adriana said that some states and affiliates are okay with people starting new affiliates in their areas, and others strongly desire integration.

Some affiliates have integrated diverse members, even with a language barrier. Adriana said, "There's an affiliate that is completely integrated, bilingual. Instead of taking an hour, it takes two, because you have to translate, but it was working there." She said that the success of this model depends on the people and the affiliate location.

For the decision of whether to integrate or establish new affiliates, Adriana supports the preferences of people who are racially diverse. She said that if people do not feel entirely comfortable or welcome at existing affiliates, then HAO has two choices. It can either allow the group to meet separately or not have the group be a part of HAO. Consequently, she sees separate communities as a sometimes necessary step for the diversity stage that HAO is in. She stated, "Ideally, I would like one day for [HAO] to be all joined, but realistically, we are not there yet."

Interpersonal Strategies

In addition to organizational management strategies, HAO also uses interpersonal strategies to cultivate relationships with members. The interpersonal strategies are organized by the stage in the relationship in which they are particularly important.

Cultivation Strategies for Developing Relationships

A primary cultivation strategy in the early stage of the relationship is the creation of a welcoming, nurturing culture of giving. Regardless of people paying dues, HAO gives its core services for free, including educational classes, personal advocacy through the public health system, and support groups.

HAO uses constitutive rhetoric to make everyone feel like they belong and to establish a culture of resistance to the stigma surrounding the illness. When asked how HAO demonstrates its long-term commitment to members, Amber replied, "[HAO] talks a lot about itself as being a family, and there is no longer-term relationship than family." In addition, establishing a culture of resistance through constitutive rhetoric is especially important for new members who struggle with the diagnosis of themselves or a family member. At the HAO walk I attended, a speaker delivered a moving speech about the discrimination she faced in the health system. She ridiculed people's responses to her illness, and the audience audibly supported her.

Through participant observation and document analysis, I identified that HAO cultivates strong relationships with new members by helping them repair their relationships in their families, which is a task-sharing strategy.

Adriana presented a four-step process for cultivating relationships with diverse members. The first step is to conduct research about the target group by finding out "Where do they live? …What are the important places for them?" The second step is to "establish relationships" and "really find people in those communities who will get you entry." The third step is to listen. Adriana stated, "You have to come and listen to what I think my problem is." The fourth step is perseverance. Adriana commented, "Sometimes,

you can do everything right, and for six months, nobody will show up, but guess what, seven months, people start coming." In addition, HAO uses several languages to connect with diverse audiences.

HAO uses consubstantiality by emphasizing commonalities between staff members and new recruits. In the spring 2007 issue of Stateton's magazine, an affiliate staff member described outreach efforts in migrant camps to the Hispanic and Latino communities. She wrote, "Often, they are relieved to learn that we are not … health professionals, but we are family members like themselves who are concerned about the family as a whole and not just the individual who is ill."

Cultivation Strategies for Sustaining Relationships

The timeline for potentially working through the shock of diagnosis varies for people. After the honeymoon period of joining HAO wears off (if it ever does), certain relationship needs become prominent. One of these needs involves resolving conflict. Tom, a staff member, commented that as people get involved, personality conflicts deepen. He stated, "If someone rubs someone else the wrong way, they are going to go build a coalition against that person." A clash of personalities can result in an escalating conflict. Sometimes, HAO uses leadership consultants to mediate conflict. Casey, a leadership consultant, believes that her outsider status to the states and affiliates helps people listen to her and respect her. She said that as an outsider, her management of negotiations is "a whole lot more effective than the board president saying it when they see him all the time."

According to documents from HAO's Strategic Planning Group, HAO's guidelines for managing conflict involve first convincing individuals to agree to ground

rules that include keeping an open mind and heart, asking questions, participating in dialogue, and respectfully listening. The document also establishes consensus as the voting procedure for decisions, and it defines consensus in the following way:

> Everyone's ability to say upon reaching a decision that "I have said all I have to say and believe all can understand me. I have listened to what others have said, and I believe I understand them. I will support the decision of the group, even though it may not have been my first choice."

A strategy that helps for situations when people do not get their way is investment. Jamie commented, "You can't make – what I call 'withdrawals from the bank account' without making deposits, so you have to spend time making deposits so that you can cultivate those relationships and make withdrawals down the line."

Ken established a coalition to unite the members in his state with each other and with outside partners, and within this coalition, he uses a strategy of win-win or no deal. He stated, "If they can't compromise, they don't take that to the legislature."

In addition to conflict resolution strategies, HAO uses frequent communication through various media to cultivate relationships. When asked how HAO builds trust with members, Amber replied, "Some of that is by keeping information flowing." Messages need to not only be sent often, but they also need to be repeated. Jaime explained, "Nowadays, you have to over-communicate, particularly when you are doing grassroots work." HAO uses various media to carry its messages. Jeremy stated, "The information doesn't filter. We have nine or 10 ways of communicating."

HAO also recruits members to keep members. Reflecting a strong theme from interviews, Casey stated:

One of the biggest keys to membership retention is recruiting new members, because people get tired, they get burned out, and you need new blood. New blood energizes what's already there. It keeps an organization alive. If an organization is dead, then people just aren't going to hang around.

Dialogue is also an important strategy. According to Amber, the organization sends messages such as, "[H]ere's what we're doing. If there's a question you have; if there's something you need; we're struggling with this; anybody have good ideas?" Amber added that HAO responds meaningfully.

Also, interviewees commonly identified appreciation as a cultivation strategy. Amanda, a Midwest affiliate director, emphasized that one of the best ways "to keep people coming back is to let them know how important they are to the organization."

Another cultivation strategy is to provide new justifications for continuing the relationship with HAO after the organization has met people's initial needs for joining. HAO does this by asking members to engage in volunteer work, transitioning members into political advocacy, and encouraging members into roles of helping new members cope. Casey stated, "[W]e talk about stages that people go through. … And the third stage is moving into advocacy." Advocacy can be a powerful outlet for people to make a difference, and HAO is the conduit through which members advocate.

<div align="center">Tactics</div>

The tactics HAO uses to cultivate relationships with members include educational programs, meetings, events, grants and scholarships, and coalitions. Communications include informal communications, magazines and newsletters, electronic communications, surveys and conversations for feedback, conference calls, and speeches.

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Educational Programs

HAO cultivates relationships with members through educational programs. For example, it has a free 12-week class that is by family members of consumers for family members of consumers. There is also a health consumer equivalent of the program, which lasts nine weeks. In addition, HAO developed a program that includes a video and booklet about exercise and nutrition. HAO also offers a 90-minute interactive presentation in which consumers share a video and their personal stories to educate communities.

Ken emphasized the ability of his state organization to educate when discussing the value of HAO's relationship to members. He stated:

> The training we do, when families and consumers do it, it is the best training in this business. They are not [type of doctor]. …These are the people who have lived the life. They know what it is, and they get expertise, because we train them, hard. We have over 300 … instructors [in my state organization]. We do a lot of training. If the instructor is not good, we either retrain them or get them out of there.

HAO focuses on providing quality educational programs to cultivate relationships.

Meetings

Weekly meetings provide opportunities for HAO to regularly interact with members and cultivate the relationship. Meetings often include expert speakers; planning sessions for social and political activities, such as the awareness week; and sharing, where members socially support one another. Local meetings give members the opportunity to connect, educate, and organize.

Events

A central purpose for events is to educate, inspire, and build solidarity. HAO uses

state conferences and national conventions for these purposes. HAO's conferences can

include such activities as sessions with doctors, awards, elections, and exhibits. In

addition to these activities, the convention also has a place where members can stop by

nearly anytime during the day to meet national staff members and discuss HAO activities.

Benjamin, a national staff member, stated, "I've never been to a prayer or a revival

meeting, but if I had, I imagine it would be something like the convention." The national

convention is a ritual that renews people's spirits. The convention is one of the many

places where HAO facilitates the sharing of success stories. Amber stated, "We try to

provide people with information as well, so they're not wasting their time and energy and

feeling frustrated: 'Well, we tried,' because that becomes the excuse for not doing it."

Amber offered an example of a local diversity success story that one of its state

organizations shared.

A social event can be a powerful way to communicate genuine concern and

appreciation for members. Lisa, a health consumer and staff member, described her

affiliate's Christmas party[13] for health consumers. I asked her if HAO participation was

promoted at the event. She countered that the event was meant to "not just spread the

word of [HAO] but to *spread the love of [HAO]*. To show that [HAO] truly does care

about you." She explained that this was one night of the year in which health consumers

could feel cared for "because so many of the consumers have nobody." Social events

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[13] Last year, the HAO state organization changed the name to "holiday party." Lisa
officially adopted the name change but continued to refer to it as the "Christmas party"
during the interview "because that's what it really was." I use Lisa's nomenclature since
the quotation is from her.

show that HAO cares about members, and they are a great way for bonding to occur. Describing the evening activities at the state conference, Ken stated:

> The need to get away, the need to have fun, the need to be important is something all my membership needs on a day-to-day basis. They are dealing with one of the meanest illnesses in the world. We have a dance Friday night, and we're bringing… about 13 family members, and they sing, do skits, and they're coming in for the dance. We have… Elvises coming in for people to get pictures with them. We always have the *best* food in the world – I make sure of that.

Ken said that his event shows members that they are important and gives them a needed break from the stress of illness.

In addition, events can attract members, which can mitigate burnout among existing members. According to Mya, the awareness walk is "one of the best recruitment tools [HAO] has." She said that the walk attracts more volunteers than the educational programs do, and the volunteers who it attracts tend to be particularly active. Mya stated, "The walk pulls in new leadership. It's such a fun, motivating project…. The people who do that are generally doers." The event template is so popular that many state and affiliate staff members have requested additional templates from the national organization.

Events are also important places for establishing solidarity. Team names from one affiliate's walk include The Believers, Healing Hugs, Never Walk Alone, Rebels with a Cause, and Walkers of Hope. According to Marcy, a Midwest executive director of an affiliate, the walk is especially effective as "a bonding and membership-building opportunity."

Communications

Among the hundreds of affiliates, 50 state organizations, a national organization, and an organization in another country, HAO communicates in various ways and has hundreds of public relations materials. Communication tactics that HAO uses include informal communications, magazines and newsletters, electronic communications, surveys and conversations for feedback, conference calls, and speeches.

Informal communications. According to staff members, informal communication is better than formal communication for building relationships. Jaime, of HAO National, stated, "Informal communication is where relationships are built. And so it takes more time, but being available yourself and putting yourself out there to be interested in knowing the person is how you're going to build the relationship." Thus, informal communication is particularly effective for cultivating relationships, and it involves a genuine interest in getting to know people.

Informal communication is also important for effectively communicating messages. Jaime stated:

> What you can't think in communicating with grassroots, in my opinion and from my experience, is that your formal communications work. They don't. It's the informal communication that really seals the deal. And so you have to take the time to pick up the phone.

Jaime added that the best process is to send formal communication and to follow up with a phone call. These steps reduce relationship stresses that could result from communication problems.

Magazines and newsletters. HAO uses national and state magazines, in addition to affiliate newsletters, to cultivate relationships with members. HAO publishes the

national and state magazines quarterly, and many affiliates produce monthly newsletters. The major sections of the national organization's magazine include a letter from the executive director, columns for members to share their journeys with coping, stories about events and members, a multicultural column, an update from the Board of Directors, news from a featured region of state HAO organizations, book reviews, a column about HAO resources and clinical trials, and feature stories. HAO magazines encourage members to contribute articles. The columns in which health consumers and family members share their journeys involve deep disclosure, descriptions of the difficulty of recovery, strategies for recovery, and visions of hope.

The national organization's staff members discussed the role of the magazine in building trust by establishing transparency, by making only achievable promises, by communicating the achievement of promises, and by producing a well-edited publication. Amber stated, "I think transparency has a lot to do with it," and she said that the magazine is a primary method for achieving transparency at the grassroots level.

Tom, of the national organization, said that he enjoys "finding out about where members are in their lives and interviewing them and quoting them in the magazine, so the magazine and Web site can be a conduit through which they see one another talking about how they're getting along." Thus, HAO's materials are not only a place for staff to communicate to members, but they are also a place for members to connect with one another.

Ken said that retention involves communication, and a key part of that is the affiliate newsletters and state magazine. Ken emphasized the importance of investing resources in the state organization's magazine, which is a national award winner. He

stated, "We work at it. We don't put paper together and try to cut costs. This is a colored magazine… At the end of the day, they think, 'Wow, this is why I should be a member of [HAO].'" Ken's comment suggests that the time and resources invested in the magazine show one sign of HAO's commitment to its members.

Electronic communications. HAO has an immense amount of information regarding education, support, and advocacy on its Web site, and it produces many online publications to which people can subscribe through e-mail. One publication is sent each Friday and another appears in the months when the national magazine is not published. Describing the latter publication, Amber stated, "It's kind of feature-y…It's nice; it's attractive. If you like reading about … illness success stories, it's great."

The Web site has a sign-in option that enables people to customize the home page to their interests, and it invites people to register for e-mailed updates on issues of interest. Referring to the Web site, Amber commented, "We make a big effort to keep it fresh and relevant." When the national organization updates its Web site with relevant information, people receive links to the updated content that matches their interests. Amber stated, "For the last couple of years, we've radically increased e-mail communication that goes out." HAO has various electronic communications and provides updated information.

HAO's Web site is a place where members can connect online. The Web site has discussion forums that invite visitors to discover support, exchange knowledge, and meet people with similar experiences. Members produce cultures of resistance to stereotypes on the message boards. For example, a member described someone's response to her and

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ridiculed it, calling the statement "idiotic." In this way, the Web site becomes an outlet for people to collectively react to the people who provoke them.

HAO recently added a blog to its Web site, which the executive director authored. The blog is a way that HAO engages in dialogue with members. The first post received four comments, and the second post received 17 comments to date. Some people praised HAO for the blog and educational programs while others railed on the need to resolve the immediate quality of life issues for people without funds. The blog enables participants to choose whether they wanted to post anonymously.

Jaime said that one way the national level builds trust is by sending a weekly summary of information to staff and members each Friday. She explained, "That was …us saying, 'We really do care about you. We're going to communicate with you every Friday, and we're going to do it, do or die, every Friday.'" Members can sign up for the publication through the Web site. Jaime explained that this is one way to make a promise and keep it.

A major issue regarding electronic communications is access, so by focusing on hands-on information, HAO hopes that states and affiliates will recycle online content, which most members do not seem to access. Amber explained:

> So many of these things go to kind of third-generation iterations. To a certain
> extent, we depend on the kindness of our grasstops to do that. So we're always
> looking for things that are valuable enough that they want to pass it on. …The
> secret is for people to feel relevant, which means that you need to get them
> information that they feel like they're going to do something with.

Laura said that the Friday publication is one of the best places for states and affiliates to find useful content, which they can share with members.

HAO National recognizes that most of its membership is not online; however, it invests resources in online communication to recruit the next generation of HAO supporters. Tobias, a national staff member, said that 5 percent of registered users on the Web site say that they are HAO members. Tobias explained that the Web site is a place to attract new supporters to HAO. He stated, "Part of our strategy is to figure out how to take people who are information gatherers and convert them to people who are supporting the organization." Tobias said that the more often people visit, the more likely they are to be HAO supporters. Jeremy said that HAO is particularly looking to recruit the next generation of leaders through the Web site. He said that he wants to "appeal to the same population that Googles into our Web site 17,000 times a day." He wants to know "how to talk to them, because they are really our future."

Surveys, conversations, and participant observation for feedback. Staff members discussed formal and informal strategies for seeking feedback. Tom, a national staff member, said that he looks forward to conducting a communications audit. He explained, "I want to do a readership survey to find what people do and don't value about [the magazine], so I don't accidentally kill out something that people… really like." A communications audit is one strategy HAO employs for feedback.

Tobias described the quality assurance surveys he manages for the Web site. He runs the surveys for one month at a time on a quarterly basis. He said that he looks for "how often they came to the site, what they came looking for, [and] whether they found

what they were looking for." He uses the information to gauge whether the Web site meets the needs of the people visiting it.

In addition, the organization surveys about 2,000 of its supporters during the annual convention. Amber explained that members vote for the board and respond to additional questions, such as "How do we make this as interactive and inclusive as possible and increase participation as much as possible? … What ticks you off, what do you need to know, where do you get your information?" The annual convention is a good opportunity for using surveys.

Staff members also use the convention as an opportunity to observe members' interests and ask them questions. Tom said that he looks forward to attending the convention to learn more about supporters. He stated:

> I look forward to our annual convention as an opportunity I'm going to have to better acquaint myself with what our membership wants and cares about and is passionate about, so that I can bring a critical eye to what we're doing. A lot of it is making us more responsive.

When asked about how he plans to solicit feedback, he replied, "Just showing up and soaking up the vibe and going to meetings and breakout sessions and watching what people have questions about." Observing people's interests at the convention is an additional method of feedback.

HAO also uses conversations to elicit feedback. Jasmine, a rural affiliate leader, attested to the importance of systematically asking for feedback. She suggested asking, "Is this working for you or is it not?" and noted, "Open communication is what helps affiliates to grow." Jasmine also listens to her supporters' requests for programming.

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Referring to the family education and support program, she commented, "We have some bites to see if we are going to run it in the fall." Feedback commonly occurs through conversations at the local level.

Jaime said that even though people give her and other staff members feedback in person, "You can't be so arrogant that you don't want to give them ways to give it to you anonymously." She said that although many people confront her with ideas and feedback, "A lot of them are waiting for you to ask." People have different preferences for sharing feedback.

Conference calls. Two senior leaders of HAO National participate on monthly conference calls with HAO leadership, which includes members who serve on local boards of directors and two councils of people with the illness. One of the conference call leaders commented, "We're the first agenda items on their conference calls every month, and it's open season. They can ask us whatever they want." Monthly conference calls are an opportunity for members in leadership positions to engage in dialogue with HAO executives.

Speeches. Speeches can be a useful technique for recruiting supporters, which can mitigate burnout among existing members. Ken explained:

> The first year, when I told you we were in so much trouble, I gave 150 speeches that year all over the state. I was somewhere almost every night, helping people to get to know what [HAO] was all about, getting people to know what our vision was, getting to know the importance of the family movement, and this year, my last year, I think I gave about 75 presentations.

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Speeches play a key role in Ken's strategy for building the state organization. His success with taking the organization from a red flag situation to one of HAO's most financially strong states gives credibility to his approach.

Grants and Scholarships

HAO also cultivates relationships with members by providing grants for health projects, in addition to scholarships to state conferences and national conventions. For example, one affiliate has a program for families with young children who have illnesses. In addition, the state organization gives every affiliate scholarships for three members to attend the state convention. The state organization also offers $5,000 to any major metropolitan affiliate that wants to host a walk. Ken noted, "It takes money to make money." Grants and scholarships are gifts that HAO uses to cultivate relationships with members.

Coalitions

Sometimes, members of affiliates want to lobby the state legislature with different agendas. Casey explained:

> It may be that in one state, a [HAO] affiliate decides that what they want to ask
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> for this year is more hospital beds. Well, for another [HAO] affiliate in the state,
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> that may not be an issue, because they have a hospital in their town, so they might
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> go in and ask for something else. …It might all be really good things, but rather
>
> than getting together and speaking with one voice with a lot of names behind
>
> those voices, you kind of split your impact.

Addressing this issue, Ken recounted, "The definition of a [name of illness] firing squad when I came here was everybody got in a circle and shot each other. And the legislators

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laughed at us." In a compelling voice that one might expect from a leader who commands

by charisma, he said, "When I came here, I pulled everybody together and said, 'Our

dirty laundry is done in this room. Period.'" To resolve conflicting agendas among

members, Ken formed a coalition of all members in the state, in addition to people

outside of the organization who planned to lobby the legislature for health issues. The

coalition includes 29 health care organizations. The coalition meets at least monthly and

meets "all the time" during the legislature's budget period.

Additional Tactics for Diverse Populations

In addition to the tactics mentioned thus far, HAO has additional efforts that it

uses for diverse populations. For example, the multicultural center holds an annual

diversity symposium during the annual convention to discuss issues in the African

American, American Indian, Asian American, and Latino communities. In addition, HAO

uses its publications to emphasize the organization's commitment to multicultural

outreach. Adriana explained:

> My strategy for states, even when I don't want to do it, is to be in their face. All of
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> the key leaders get [the Friday publication], so every week, I make sure I have
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> something in [the Friday publication]. Even if they don't like it, they have to
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> realize that this is important to national all the time. And that's the message from
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> [the current executive director of HAO National].

Adriana believes that this communication helps the local level realize the importance of

cultivating relationships with diverse members.

In addition to publishing messages in HAO materials, the multicultural center also

has its own newsletter for staff and members who are particularly interested in

multicultural outreach. The newsletter contains studies specific to certain races (and sometimes specific to a certain race and gender), outreach success stories, and steps HAO takes to advance the interests of diverse populations.

The multicultural center also publishes a Latino newsletter. Adriana described the newsletter:

> It's eight pages. … news from [HAO], personal stories, research updates, policy issues. It's specific to the community – that's the key – and it's in Spanish. What I would like to do is to make it bilingual for the non-Spanish-speaking Latinos, but I just don't have the money.

The national organization's Web site promotes the newsletter as an outreach tool for local Latino communities. I asked Adriana how she distributes the Latino newsletter. She said that anyone who joins HAO and self-identifies with the Latino community automatically receives it. In addition, people can sign up for an electronic version online. Adriana also coordinates grassroots distribution of the newsletters to people. She explained that she mails the newsletters in bulk to states and affiliates who have strong outreach programs for Latino audiences.

Because HAO does not have a newsletter for African Americans, Adriana said that she ensures that there are articles about African Americans in the national magazine. For example, a recent article by an African American man addresses the cultural stigma regarding the illness that African American men face. This article also shows how some HAO materials have depth by addressing the intersection of race and gender.

HAO has dedicated message boards for diverse communities, including an international and multicultural forum, GLBT room, and Latino space. In the GLBT space,

Cassandra, a staff member from the multicultural center, wrote that the purpose of the group is to provide support and information about the illness in the GLBT community. Cassandra also invited people to post suggestions and questions. On the boards, members thanked HAO for establishing a dedicated space, shared personal struggles about what can be the "dual closet" of a particular illness and sexual orientation, and offered supportive comments, in addition to advice. In the GLBT area, members mobilized to successfully report and kick off a poster who was criticizing people for being gay, lesbian, bisexual, or transgendered. Members enthusiastically supported each other while shunning a "bigoted" person's attempts to crash their discussion room. HAO's discussion boards enable diverse communities to connect and share information.

One way Adriana shows appreciation for members of her diversity task forces is by giving them scholarships to attend meetings for HAO leadership. Describing a meeting that state and affiliate leaders attend, she stated: "I always have scholarships to bring at least five of my leaders to that event, so they can be visible. And they can become leadership, so it's not just a little goodwill outreach." HAO cultivates relationships with diverse populations by providing financing for diverse members to participate in leadership meetings.

RQ 3: What are Members' and Former Members' Opinions About How HAO Builds Relationships With Them?

Members and former members reflected on both HAO's organizational management strategies and its interpersonal strategies. Tactics that participants characterized include HAO's educational programs, meetings, events, communications, and grants and scholarships. For communications, participants discussed HAO's informal

communications, magazines and newsletters, electronic communications, and feedback methods. Participants did not identify HAO's tactics for diverse populations, its coalition, its speeches, or its conference calls.

<p align="center">*Organizational Management Strategies*</p>

In this section, the following organizational management strategies are reviewed: capacity building at the local level, delivery of core services, shared control over major decisions, promise making and promise keeping, and diversity strategies.

Capacity Building

Although members did not explicitly describe this strategy, most members characterized their relationship with HAO based on their local interactions, which supports the strategy of capacity building at the local level. When I asked Marissa if she trusts HAO, she replied, "Absolutely. I personally worked with the leaders… I have trust in them through that." A major advantage of capacity building at the local level is that it is ideal for cultivating personal relationships through face-to-face, frequent interactions.

Delivery of Core Services

Many members come to HAO in crisis and become endeared to the organization through its delivery of the service they need. When I asked Stacey about her feelings for her affiliate, she asserted, "It's fantastic. I don't know how we would have ever survived and made it, living and dealing with [the illness] without them. They've been our guidance, and they've been our support. I couldn't even envision." Because HAO helps people cope, recover, and enjoy life, many people become endeared to it and want to have a lifelong relationship of giving back to it.

Although most members referred to HAO's core services when describing how their relationship developed with HAO, some people expect more from the organization. Marissa, who characterizes her relationship with HAO as "very positive," qualified her discussion by stating, "I think they could continue more educational programs in the community and more advocacy for the parity act. I'm disappointed that we haven't gotten that passed." When considering this theme, I noticed that some participants praised HAO based on its efforts (without mentioning its effectiveness), so I asked others who focused on HAO's advocacy, "Is it important how effective the legislative efforts are, or is it important that they're trying their best?" Douglas replied, "No it's not good enough." Thus, some people base part of their advocacy evaluation on the organization's efforts, and others focus on the end result. HAO's performance of core services can influence its relationship with members.

Shared Control Over Major Decisions

A notable silence in members' answers was not having much to say about shared control in the relationship. Although I could not help noticing that control was a primary issue in the relationship between affiliate staff, state staff, and national staff, it had minimal importance among the grassroots members I interviewed. I asked Douglas whether he felt satisfied with the amount of control he has in his relationship with HAO. He replied, "Oh yeah. I could probably do more asking, but I choose not to." Members seemed to shrug off this question. Even the few former members I interviewed did not desire control in the relationship. Angela left her affiliate due to treatment that she said came from her affiliate being "uninformed," which manifested itself in racist ways. She stated:

I think [HAO] predominantly helps people who are able to make large

contributions. … I don't have that type of money. There really isn't anything I

want from them. … I consider them uninformed. I don't come to [HAO] to argue.

… I really don't care what they do.

People who were unsatisfied with HAO seemed to want to withdraw rather than assert

control in it.

Promise Making and Promise Keeping

Members said that they like HAO's updates about what it wants to do, what it is

doing, and what it has achieved. Kristen said that she feels like HAO wants to be in a

relationship with her for the long haul. When I asked her how HAO has shown her this,

she replied, "The publications show me a lot – what they have done and accomplished.

Their publications show me what they're dreaming to accomplish. Their publications

show me what they are working on diligently." Thus, HAO cultivates a relationship with

members by making promises, communicating its progress toward fulfilling promises,

and achieving promised goals. Conversely, breaking promises damages relationships, as

shown through the example in the first research question in which an affiliate cancelled

meetings without notice.

Diversity Strategies

The people I interviewed did not identify HAO's diversity strategies when

discussing the ways that HAO builds a relationship with them, which is partly due to the

minimal racial diversity of the people I interviewed. Angela did not identify HAO's

diversity outreach strategies as effective for her. I asked follow-up questions regarding

her thoughts about HAO's diversity committees, the annual meeting at the convention,

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and the establishment of the issue as a priority in the strategic plan. Angela responded, "I am aware that they have – I believe the buzzword is 'diversity programs.' I believe they are definitely trying. And I'm sure that there are many African Americans who are satisfied with every level of [HAO]." Angela also noted, "They have done some great things for whoever they've done them for, but I can't see any improvement – I don't know what kind of multicultural thing they have; I haven't seen it." HAO's organizational management strategies for prioritizing multicultural relationship building have not trickled down to the grassroots level for all people.

Interpersonal Strategies

Members and former members responded to HAO's cultivation strategies for developing relationships and sustaining relationships.

Cultivation Strategies for Developing Relationships

Numerous members praised HAO's welcoming, nurturing culture of giving. Sarah praised HAO's culture and described how she would feel if she did not return HAO's generosity: "I would feel like a thief. They gave me so much. …I feel that I have a debt to repay. But not only that, but I've met a lot of nice people, and I would add that very quickly." Although this description might suggest the production of a culture of exchange, Sarah answered "indeed" when I asked whether HAO genuinely cares for her. As evidence, she stated that HAO "will bend over backwards trying to resolve your current problem." HAO even helps people with challenges that are unrelated to its mission; for example, staff members helped Caitlin move.

Many members also said that HAO's messages of solidarity strengthened their relationship with the organization. A member wrote in the state organization's magazine

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that the organization often reminds members that they are not alone. The member added

that this message has sustained her through many heartbreaking situations.

Many members reported that HAO has bonded them together through their shared

cause, and this has resulted in an unbreakable relationship with HAO. Gertrude said that

she stays in HAO because of "the camaraderie." She explained, "We've been through

hell together, and we have such strong bonds."

When I asked members how HAO cultivates a relationship with them, many

people replied that HAO makes them feel important. Caitlin explained, "I've always been

shy… and [HAO] said, 'Hey, it's good to open up to people and tell them how you feel

instead of holding it back.'" Caitlin also said that HAO cultivates a relationship with her

by "letting you know that you're important by doing little things with you."

Members also reported that HAO establishes a culture of resistance to myths

about the illness. Kate stated, "I didn't identify myself to others as a … 'health consumer'

until I first went to [HAO]; in some ways I thought of [name of illness] as a moral

weakness." Members reported that HAO helped them embrace this part of their identity,

which resulted in developing favorable feelings toward HAO.

HAO's use of constitutive rhetoric for both consumers and family members

repairs relationships in people's families, which endears people to HAO. Erin stated,

"One of the things that meant the most to me actually involved my parents."

The members and former members I interviewed could neither speak to HAO's

four-step process for relationship building in diverse communities nor HAO's other

interpersonal diversity strategies. Nevertheless, I found evidence of successful

relationship building with diverse communities through stories in HAO's newsletters and

through staff members' success stories. Amber discussed HAO Tennessee's goal last year to build relationships in the African American community. She commented:

> They sort of looked at it and said… "We need to figure out how to do it so it's real and … so it's respectful," and they put together a plan and they went about it. The Leadership Institute was down in Nashville, and almost every one of the volunteers they had working was a new member African American.

Cultivation Strategies for Sustaining Relationships

Although members did not discuss the use of a mediator for resolving conflict, Casey conducts anonymous evaluations after she has helped an affiliate. She reported that her evaluations have been positive. She said, "I end up getting really good feedback, ironically, especially from the one [state] that was so contentious."

Reflecting on the organization's ground rules and commitment to consensus, Amber reflected, "It's great in theory. Does it always work? Absolutely not. But I think that even if it doesn't always work, … those efforts are appreciated, at least by some portion of the participants. And that builds credibility." Amber added, "I had somebody say this to me: 'I don't always agree with what you've done, but I do feel like you're doing it in a thoughtful manner.' Well, you know, that is a great compliment." Process is important, especially when outcomes do not match people's preferences.

Timothy said that he enjoys the differences in opinion, even though "people would be quite upset." I asked him if the organization's ground rules played an important role in keeping the group together. He replied that the most important thing was members' commitment to the organization. He stated that in his experience, "The commitment people have in their hearts for the organization allowed that to happen."

Although I did not talk with participants in Stateton's coalition, signs suggest the coalition's success, which results in cultivating relationships by helping members gain political ground. Ken said that one possible consequence of the coalition is that the state health department received a revenue increase over the past six years while all other departments received a reduced budget due to the state's $4 billion deficit. The state is among the best states for public health, according to a report by HAO National, which could also point to the coalition's success.

Participants emphasized HAO's communication as playing a fundamental role in the relationship. For example, describing the content of the state magazine, Douglas commented, "It's good. … There are things that [members] can be involved in, and [HAO] encourages them." He also added, "What they stand for, they pursue. And the evidence of that pursuit is seen in their activities and publications."

Dialogue is one way that HAO makes members feel like they matter to the organization. As mentioned earlier, Caitlin learned to think of herself as someone who matters when the staff encouraged her to share her opinions. Other people referred to dialogue as an important way to share concerns and introduce ideas. Kristen commented, "I think they are… good listeners."

Most participants said that they feel appreciated; however, some do not feel valued. Donna and Wayne wrote, "Appreciation for participation is always expressed." Jasmine emphasized the importance of constant encouragement. When I asked her whether there was anything she wants HAO to know, she replied, "Those of us who are struggling, we need encouragement to keep on keeping on. … That would probably be my major thing."

I spoke with many members who enjoy volunteering for HAO as a way to reciprocate HAO's care and assistance. Shelly, a woman I met at a HAO Walk, wrote, "Initially, I was involved because they had services and people that helped when it seemed as if no one else had a clue. Now, I am involved as my way of giving back."

Many people stay in HAO for reasons that differ from their reasons for joining. New reasons include advocacy, helping new members, and financially supporting the organization. In a state magazine article, an author wrote that she learned to engage in political advocacy on behalf of "ALL families and consumers." George recently told a HAO staff person that he could share his story now that he is fully recovered. He stated, "There are people who have recovered who would like to tell other consumers how they did it." Expressing financial motivations, Marcy praised an educational program and stated, "There's no cost. And to me, that was amazing. … I felt I wanted to make sure that, that continued."

Tactics

Participants expressed opinions about HAO's educational programs, meetings, events, communications, grants, and scholarships. Members and former members in this study did not identify HAO's tactics for diverse populations, including the symposia, publications, electronic resources, and scholarships. They also did not identify HAO's coalition, speeches, or conference calls as cultivation strategies.

Educational Programs

Members and former members raved about HAO's educational programs. A participant on HAO's Web site wrote that the program taught in nine weeks what it took 20 years for the person to learn. In one of HAO's newsletters, a participant wrote,

"[Name of program] was the main factor that helped me to find joy and hope living with [name of illness]." Based on two academic journal articles, researchers found that the family program decreases family members' sense of burden and worry about their loved ones. Educational programs are an effective vehicle for cultivating the relationship.

HAO also provides education through guest speakers at meetings and conferences. George stated, "What I enjoyed most was having … doctors talk." Education is an important core service that HAO provides, and many people referred to it when considering their relationship with HAO.

Meetings

An important way that HAO provides hope is by establishing a meeting place for people who share concerns about the illness. Julia stated, "I think that so much comes from sharing with other people with the same problem. That's one area where [HAO] does a super job." HAO affiliates often have support group meetings for people to work through their challenges together.

Events

Kristen praised the national convention and said that she appreciates the inspiration from stories of "how people started out with [HAO] and then worked their way up in the … field." Participants enjoy sharing ideas and taking them back to their affiliates. Cathy commented, "I find neat stuff that I would like to see happen." Kate discussed how the national convention helped normalize the illness for her. She said:

At the [HAO] National conference, everyone wears a nametag around their neck that says your first name in big letters and then your last name and where you are from in smaller letters, so everyone calls everyone else by first names. After

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asking about someone's hometown, the next question is usually, "What's your

diagnosis? What are you taking for it? How's it working for you?" Everyone is so

open and sharing of information. It is just so 'normalizing'; I don't hide my

diagnosis anymore.

HAO's convention establishes a nurturing culture, which facilitates relationship building.

Members often get together after meetings to informally socialize. Samantha

described how HAO helped her make friends with members. She stated, "As a group, we

go out afterwards at a restaurant to socialize after we talk about serious stuff." Informal

events can help members release stress and bond, which enhances their relationship with

HAO.

Members also enjoy formal social events. Caitlin described one of her favorite

events:

[HAO] has an Easter dinner where everyone participates… everyone brings

something in, and as a group, we talk about different things. We advocate

different things. And it gives me a chance to say, "I'm a person, just like

everybody else is."

Social events can be a great place for people to feel like important group members.

Members also discussed the awareness walk. Samantha said that "just walking with the

members" established a sense of solidarity. Ken said that the response to recognition

events has also been strong. He stated, "This couple came up to me, and they said… 'We

want to thank you so much. …This is the first time in 17 years we've left our son for a

weekend.'" Formal events can be effective ways of giving members a social outlet to

connect, validate one another, and feel appreciated, which strengthens members'
relationship with the organization.

Communications

Members and former members reflected on HAO's informal communications,
magazines and newsletters, electronic communications, and feedback methods.

Informal communications. Participants said that HAO's informal methods of
communication are effective. Douglas said that the local chairman of HAO called him the
previous night to invite him to see a top doctor speak at an upcoming meeting. I asked
Douglas what he thought about this technique. He replied, "It's as effective as you can
get! … It's kind of a personal, encouraging act." Direct contact with participants is a
personal way of encouraging people to get more involved with the organization, which
can strengthen their relationship to it.

Magazines and newsletters. Members and former members praised the national,
state, and affiliate newsletters. Donna and Wayne wrote, "The magazine and local
newsletter create a feeling of trust, as they indicate what [HAO] is doing to help
consumers and their families." Commenting on a state magazine, Stacey stated, "I think
it's excellent. I like the interviews they do with some of the clients. Ken, he always writes
an article, and his successor will do likewise." Other members praised the articles by
consumers. Julia stated:

> There were three articles by consumers… And I told [my daughter], read this.
> Because I think that so much comes from sharing, you know, with other people
> with the same problem. That's one area where [HAO] does a super job.

Publications can be a great place for members to learn about HAO's efforts (which can build trust), discover ways to get involved, and connect with one another.

Electronic communications. Few participants could comment on HAO Web sites because they did not use the Internet. Erin provided the following suggestions to make the site easier to use:

> Maybe if they had fewer menus. There's like four or five menus at the top and then on the left-hand side, and maybe if they just kind of condensed it? Because I felt a little overwhelmed. There are just a lot of options. … I don't know, maybe some more pictures?

Although Erin found the Web site overwhelming, many participants said that they were in crisis when they found HAO and were starved for information. The massive amount of information could be inviting to some members and overwhelming to others.

People I interviewed did not recognize HAO's strategy of using the Internet for recruitment, and many referred to HAO's prolific online activities as making them feel left out. Rena echoed many people's comments that HAO needs to have other ways to reach members who do not use the Internet for information. She observed, "[HAO] has begun (and I think not on purpose) to make itself inaccessible to portions of its membership. …'Snail mail' must be better utilized for these people." HAO's online activities can actually backfire with members who are not online.

Some responses to HAO's blog were entirely positive, some were negative (and were focused on the need for HAO to fix the public health system), and some were mixed. One anonymous poster commented that the problems the executive director pointed out were obvious and suggested "call-to-actions," personal ideas, and solutions.

The poster also was "very glad" for the blog and looked forward to substantive topics and solutions. The poster closed by thanking the executive director. Another person praised the blog and proposed a real-time chat session. Overall, most comments suggested a positive reaction while noting ideas for improvements.

HAO's discussion boards include hundreds of posts by members who use the boards to connect, socially support each other, provide advice, and resist stigma. In a young adults discussion board, a recent string of postings were about a news story. Members braced for the stigma that they expected to result and reinforced one another for being strong. One person offered "big hugs" to another poster, and one poster ridiculed discussions in the media about the illness. Interestingly, some people shared their reactions to the HAO blog in the discussion room with each other rather than or in addition to posting responses in the blog area. Some people in the discussion room praised a HAO dissenter for telling the executive director that HAO should spend money from fundraising events on fixing the quality of life challenges that members face rather than giving grants to researchers. Research is one of the four areas of the organization's mission. The rich discussions on the board suggest that an online discussion room is an effective way to build the HAO community, nurture relationships among members, offer social support, and resist stigma.

I did not interview anyone who mentioned the Friday publication; however, Jaime asserted that people value having a regular update every Friday. She stated, "There were a couple of times when there was some computer glitch, and people would get furious. … It's way more harmful to do [the Friday publication] on a Tuesday [than to not do it all]." Thus, one way to make a promise and keep it is to promise valuable communication

updates on a weekly basis and deliver them on time. Breaking promises can harm the relationship.

Surveys and conversations for feedback. Members and former members did not jump on this topic, even when I introduced it as a probe. For example, when I asked Kristen about feedback, she stated, "They don't rush out and ask me, but if we're together at a certain convention or something, they'll say, 'What did you think about my idea?'" When I asked her whether this was effective, she said, "Oh yeah." Donna and Wayne said that they "haven't been influential in decision making" due to a combination of time constraints and lack of desire, so the need for feedback was not a meaningful topic for them. Members like Samantha said they were not regularly asked for feedback but felt comfortable giving it if they had a concern or suggestion.

Grants and Scholarships

Reaction to the scholarships is generally positive, although slow reimbursements and tedious documentation can dampen this benefit. Kristen expressed appreciation for the scholarship from her HAO affiliate to attend the national convention. She said it is "a big thrill for people… who never get to go traveling… to go to their conventions, much less the stuff we get to learn." Rena appreciates the scholarship but is "very nervous" because if HAO does not reimburse her quickly, it could "cause undue financial hardship upon [her] family." She also expressed that she feels invigorated by HAO's investment in her, which makes her feel like she wants to more than compensate HAO through her efforts. Overall, members in this study believe that grants and scholarships help cultivate their relationship with HAO.

RQ 4: Why Did Members or Former Members Decrease or End Their Participation With

HAO?

Participation in HAO fluctuates; the boundaries of the organization are permeable and fluid. Some people "divorced" HAO while others went on "sabbatical" and planned to return. Also, a combination of reasons seemed to discourage people rather than just one problem. One external reason why people ended their participation, at least temporarily, was that people left after HAO met their needs. Another external reason was that people felt discouraged by stigma, particularly in rural areas. Furthermore, age and health problems resulted in people's decreased participation or withdrawal.

Reasons internal to HAO also led to decreased participation or departure. Leaders who did not appear to make room for new people to transition into power might have discouraged the next generation. Emotional stamina was also an issue. The illness that HAO tackles is a heavy issue, plus members interacted with people who were in crisis, so many people were emotionally charged. Burnout resulted from taking on too much responsibility. Problems in meetings resulted in people withdrawing from them. Some people felt like other members asked them questions that were too personal. In addition, inviting both consumers and family members to support groups resulted in hurt feelings and awkward moments. Some meetings were inconvenient, particularly for seniors who did not want to drive at night. In addition, perceived discrimination occurred. Lack of an important assignment also made some people feel like they did not need to stay in a relationship with HAO. Problems also resulted from lapses in leadership by staff and from staff turnover. In addition, some people left because they disagreed with decisions.

External Factors

Some people left HAO, at least temporarily, after it met their needs. Other

external factors included stigma, in addition to age and health.

Departure After Fulfillment of Own Needs

Some people left HAO because they received the help they needed and did not

feel motivated to support the organization, at least not immediately after using its

services. Alicia, a former state executive director, noted a large incidence of people

getting what they needed and leaving. After explaining that many people were introduced

to HAO by participating in the free family course, she noted, "We had very few people

who actually joined. …[T]hey didn't renew a year later when their membership came

up." When asked to speculate about why people did not stay, she said, "I think a lot of

people come to [HAO] when they are in crisis. I think that people get what they need."

Alicia noted that there was a lag effect in her state. Sometimes, people would come back

later. She explained, "We do see people who come back, and they say, 'You know, I took

the class years ago; I'd really like to come in and do some volunteering now.'" Thus,

many people left HAO after it served their need for education and support, and some

people returned later to give back to the organization. After attending a support group for

two years, Marcy stated, "I dropped out. I felt that I had gotten what I needed to get out

of it. I haven't done anything else but be a financial supporter since then." To continue

the relationship, HAO can encourage people to financially contribute when they do not

want any other kind of involvement with HAO.

For some, but not all people, a family member's death resulted in people

terminating their relationship with HAO. Amber stated, "We have a surprising number of

people in the organization whose family members have died … who stay connected. So

death is not the ultimate severer, but for some people it is." Through participant observation and document analysis of members' online walk pages, I saw that HAO's awareness walk is an effective way to engage people who want to walk in the memory of loved ones.

Discouragement by Stigma

According to staff members, stigma surrounding the illness, particularly in rural areas, might have discouraged people from continuing their involvement in HAO. Tanya, a staff leader of a rural affiliate, speculated that attendance has been difficult due to stigma. She stated, "I think people don't come out because of the stigma. … It's small town stuff." Amber described some people's approach as wanting to "slide in, get your information, slide out, and not really make a formal or informal connection between yourself and the organization" due to stigma. A potential way to lower this obstacle is to reduce stigma in communities through awareness events, speeches, and programs.

Age and Health

Although some people clung to HAO as they aged, others reduced their participation or left HAO due to age or health, which may or may not have been related. Mya stated, "A lot of our volunteers who started the organization are now aging out." Meg commented, "I'm not very active in [HAO] at this time, primarily for my health." Members' health challenges came from age, illness, or both. Describing the experience of the illness from a family member's perspective, Ken stated:

> [Name of illness] is so … all-consuming that it is very difficult to have your mind
> into something else, into a volunteer-type of organization. You're always going to

have a percentage that just cannot – they are excited up until a certain point, and

then they say, "I just can't do this. I need to spend time with my loved one."

A reduced amount of energy from age or the illness was one reason family members and

consumers decreased their participation in HAO or left the organization. One way HAO

can respond to this challenge is by finding low-energy ways for people to support the

organization.

Internal Factors

One reason that was internal to HAO for decreased or withdrawn participation

appeared to be a generational barrier to leadership positions. Other internal factors

included emotional burnout, problems with meetings, perceived discrimination, lack of

an important assignment, problems with staff, and disagreement with decisions.

Generational Barrier

Staff members said that in some cases, an affiliate's leadership did not make room

for change and the next tide of members. Alicia addressed the difficulty of releasing

one's grip on leading an affiliate, which has become someone's life project. She

explained that many members "built their lives around [HAO]" after being "rescued by

[HAO] years ago." She stated that their self-preservation has been built through

leadership in the affiliate, which can make them feel reluctant to "let go and let new

blood and new ideas come in." Alicia concluded, "New members are driven away by the

strong personalities and by the inability to get involved."

Tobias suggested that rituals could be a way to transition between senior and new

leadership. He recommended "having ways to really honor and celebrate the kinds of

things that leaders have accomplished. And then have a way to help new folks really feel

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welcome and pulled in – that may involve some mentoring." Formally establishing ways to transition could improve this situation.

Emotional Stamina and Burnout

Participation in HAO can be draining. For some people, the heartbreaking stories were too much to handle. Doris, who thinks highly of HAO, said that she stopped attending meetings a few years ago. She stated, "I find that if I get too immersed in [HAO] and I give it all my volunteer effort, it drags me down. Too many sad stories." I asked Doris if she could attend planning meetings that were separate from support groups meetings. She responded:

> It's always sad. You hear about someone who is dead, and you thought maybe
>
> they were living. It's just kind of – drags you down. …I didn't get a very hopeful
>
> attitude. Maybe that's one of the reasons why I stopped going.

Many participants ended their participation due to the sadness that can surround the illness. Tactics, such as light-hearted social events, and a brighter organizational culture could help.

Another reason why participation in HAO can be emotionally draining was that some people warred against one another due to their exhaustion and intense level of connection with the issue. To be fair, I also want to acknowledge that the level of emotional commitment can also be beneficial. Describing both aspects, Amber stated:

> Part of what's wonderful about it is the level of passion that people bring to it, but
>
> that's also one of the challenges. Any place where people feel that strongly about
>
> things or where it's so personal and …everyday in people's lives. And that means
>
> that you come at the work with a level of dedication that is remarkable and quite

wonderful to work with. It's quite inspirational. But it also means that you invest

a lot of emotion… And very few things are what we hope that they will be, so that

plays out for employees and volunteers.

Although the passion brought helpful energy, it also resulted in people taking things

personally and insisting on getting their way. To give an example of how this plays out, I

refer to a comment by Gene, a former HAO National board member. Describing the

HAO National board, Gene stated:

I was amazed that people were at each other's throats, and … I thought this only

happened in [my state]. I think there's an element of conflict in many levels of

[HAO]. People are really, really mad. They have a relative who has [name of

illness] who won't take his [medication], and they won't even talk with the

family, but there is confidentiality, so they're not given a role and they're not told

what's going on. When they get to a [HAO] meeting, they turn around to whoever

is sitting in the room and start chewing them out too.

This quote gives a concrete example of Ken's words quoted earlier that the illness is "one

of the meanest illnesses in the world." Participation in HAO was emotionally tiring for

some members due to the clash of people who were raging with emotion. Effective

training and intervention by a mediator could lessen this problem.

People also decreased or ended their participation due to burnout. Mya

commented, "There's a huge element of burnout in our organization. …We've just not

figured out a way to bring on enough people, so one or two people end up running the

organization and doing everything." Meg said that her friend is taking a "sabbatical from

[HAO]" for more than a year. Meg explained, "She's burned out from working too hard

and not having good appreciation for her efforts." Burnout is more likely to occur when the workload is not widely shared, and it is often accompanied by feelings of not being adequately appreciated. Appreciation, in addition to recruitment and cultivation of relationships with new members, can reduce this problem.

Problems With Meetings

Some people felt that members intruded on their privacy during meetings by asking personal questions. Many people stopped attending meetings when consumers and family members held support groups together. In addition, perceived discrimination occurred at a meeting. Meetings were also held at inconvenient times for some members.

Intrusion on comfort zone. Some people ended at least their face-to-face interaction with HAO due to members who intruded on their comfort zones. There is a high level of disclosure in HAO that occurs quickly, and some people have varying perspectives on the boundary between public and private. Furthermore, people care so much about others and want to exchange stories from lived experience that they perhaps unknowingly cross other people's boundaries. Describing members who asked her about medication, Doris explained:

> I don't think it's anybody's business. "Ew, that drug," and they make a face, and they moan. Maybe that's something that could be talked about privately, not in an open meeting with 20 people.

Doris felt uncomfortable by members' questions and reactions to her answers. I told Doris, "It sounds like members care so much about each other that they that they're like, 'Do this! I know what's best for you.' It sounds like their hearts are in the right place, but they may not be saying the best things sometimes." Doris agreed wholeheartedly with

this interpretation. Affiliate staff could manage this problem by reminding members about boundaries and by stepping in when they observe discomfort.

Consumer and family member support groups. A strong theme is that people did not get along well in support groups that combined consumers and family members. Jasmine, who has been running an affiliate for the last five years, stated:

> The families don't want to talk about their loved ones who have an illness in the presence of consumers. …We had a lot of problems with consumers … not being well enough to be there. And then families being upset because they couldn't talk. We lost people because of that.

Several family members expressed that they felt guarded during meetings with consumers because they wanted to protect consumers' feelings, and consumers sometimes acted out if they were not healthy enough to be at meetings. After many people left her affiliate, someone told Jasmine that she was not attending because the group included consumers and families. Although Jasmine responded by changing the group and expressed this change to the people she lost, early supporters have not returned.

Inconvenient meetings. Meeting times also interfered with some participants' involvement, particularly for senior HAO members. Doris explained:

> In the winter, the things are at night, and it's dark early. My husband cares a lot about this, but he's not the kind of man who wants to go to meetings and talk. I do like it, but I don't like to go out in the winter when it's dark and drive.

The darkness and evening hour discouraged Doris from driving to the meeting. She said that breakfasts and lunches during a weekday would be ideal for her, and she noted that lunches would probably be best to enable employees to go.

Perceived Racism

HAO membership is currently dominated by a late middle age to senior Caucasian generation, although the membership is becoming more diverse with the new tide of members. One person contacted me and explained to me that she left HAO at the local level due to racism. Angela described her experience with a HAO affiliate and indicated that the problems she faced are common in similar organizations. She summarized, "It's not just in [HAO]. It's many organizations that I have attended." Angela's experiences with HAO started off on the wrong foot when she contacted an affiliate for help. She stated:

> I know you have to call [the HAO affiliate] frequently, because I understand that they're busy, and I'm not the only person calling. After six or seven times, I called and … I said, "I called many times, but I'm a working person." And she said, "What difference does that make – we *all* work."

This example shows the antagonism that Angela immediately faced after she finally got through to the HAO staff, and it also exemplifies the earlier concept about people being ready to rip into one another when hitting upon each other's sensitive areas (in this case, the issue of what counts as work).

Angela's experience with the HAO affiliate worsened when she attended affiliate meetings and expressed her interests. She explained:

I think a couple of times I spoke out concerning what I felt I needed for my son,

who was an African American. One of the ladies asked me, "Was I saying that the

only person I was interested in was African Americans, and was I speaking for all

the African Americans?"

Another incident of people being "uninformed" (Angela's term) occurred during a

speech at the HAO affiliate meeting. Angela relayed:

He was speaking of all the terrible people who commit all these heinous crimes,

all the people on welfare on the Eastside, which is a predominantly black

neighborhood, and I had to explain to him, "Let's stop being silly because you

live on the lower Westside. You're not getting ready to have a power luncheon

with Bill Gates, so let's leave this foolishness alone."

Lack of Important Assignment

Some people left HAO because they did not receive an important assignment. Not

everyone needed an important assignment to stay; however, some people did. Danielle's

involvement with HAO was so minimal that she did not feel that she had experiences

with it to discuss. Danielle's story not only illustrates the importance of having a sense of

purpose in an organization, but it also demonstrates that reasons for not participating can

be hidden and layered. Danielle stated, "I was a member and I got newsletters, but I

didn't participate much in [HAO]. … I'm not involved with [HAO] right now." When I

initially asked Danielle why she did not attend HAO meetings, she replied, "I'm 81 years

old. I got to the point where I couldn't drive at night, and meetings were at night.

Especially in the wintertime." When asked whether she would attend HAO meetings if

they were held in the afternoon, in a doubtful tone, she responded, "Well, possibly. Right

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now, I've had a lot of other things going." Danielle continued by saying, "Well, I don't

participate because I don't have the time. I mean you can only do so much." Danielle's

initial reasons for not being involved in HAO were that she could not drive at night to the

meetings, and she was too busy due to other commitments. To explore these

commitments and to find out why they were more important than HAO, I asked Danielle

about where she invests her time.

Danielle has been active in two volunteer organizations. The first is a health

services center because at one point in time, the organization needed her to drive clients

to their appointments. She said, "[D]riving clients was very time consuming. But I did

that because clients needed to get to their appointments and at that time [name of the

health center] didn't have anything for clients to get to their appointments." Eventually

the center gained enough clients that it was able to hire professional transportation.

Danielle also continued her involvement as an officer of a spouses' branch of a local

service club. Discovering why Danielle chooses these two organizations over HAO

illuminates ways that HAO can improve.

When asked why she chose to prioritize her other activities over HAO, Danielle

explained, "It's not less important; it's just that when I went to [name of the health

center], I went for a specific purpose, and I'm not sure that [HAO] provided that sort of

purpose." Danielle did not express interest in getting an assigned purpose from HAO. She

stated, "I don't think I'd want to get involved. I'm kind of slowing down a little bit."

HAO could have given Danielle an important purpose to give her a reason to prioritize it;

however, due to her desire to lower her commitments, the opportunity has passed.

An HAO affiliate outside of Stateton has a good way of identifying people who might want an important assignment in HAO. Its membership form includes checkboxes for "I can volunteer ____ hours per month" and "I am interested in learning more about committees." This way, the affiliate leadership can encourage and fulfill people's desire to volunteer.

An additional point was that some people who run affiliates seemed so overburdened by work that they did not give volunteers assignments, even when volunteers asked. Erin stated:

> In my last e-mail to [the executive director], I said, "[My friend] and I are ready to start volunteering." I didn't want her to feel bad, but it was just like, "Okay, we're ready!" I think she sort of knows. …I think she might be too busy to even figure out what to delegate to volunteers. …We went to a volunteer meeting about a year ago, and [my friend is] like, "I just want to start volunteering! I don't want to go to any more volunteer meetings! I just want to do it."

Overtasked staff can contribute to the problem of not giving people a sense of purpose in the organization. Ways to improve the chances of people receiving important assignments include building capacity and establishing volunteer assignments as a priority.

Problems With Staff

Problems with staff included lapses in leadership and staff turnover.

Lapses in leadership. In some cases, the affiliate, state organization, or national organization made a mistake, resulting in broken promises and frustration. Data from this theme came from several regions of the United States. As mentioned in the first research question, Candace tried to attend a couple of meetings that had been cancelled without

her knowledge. As a newcomer to HAO, Candace felt deserted by an organization that had pledged to be there for her. Commenting on the challenge of leadership, Alex explained:

> Unless you work directly with affiliates, I do not believe it is possible to get a true feel for the challenges offered by either poor leadership or lack of leadership. Leadership development is easier said than done, because the challenge is finding people willing to devote the time, energy and heart to the effort.

Working with weak leadership was challenging for some members, particularly when mistakes occurred. Alex added that consumers were often the people who served in leadership positions. She stated that people with an illness faced the added challenge of dealing with fluctuating symptoms, which could interfere with their leadership abilities. Alex explained that many leaders do not see that they "may not be right" or that they "may not have all the answers."

> Weak leadership shrank part of HAO. When a state organization other than Stateton had a financial crisis, it lost paid staff members and a volunteer board president. Casey stated:

> The executive director resigned, the board appointed the education coordinator as the ED [executive director], even though the program coordinator didn't want to do it, told them she didn't want to do it, so basically, didn't do it. So by the end, they had no financial records, staff quit doing time sheets …The board president ended up resigning with no notice.

An organization can crumble under weak leadership, and pushing people into leadership positions they do not want does not work.

Even mistakes that could seem small can have a major impact on people's desire to volunteer. Noreen, who is not from Stateton, took a leadership position in her state by helping new groups establish affiliates. She said that she wanted to help them write their by-laws, get tax-exempt status, and officially become affiliates. She said that when a group gets together to start an affiliate, "No one really knows very much because they're all new to this too, and that's discouraging." Noreen explained, "What they really want is a leader who will say, 'Now the next thing we need to do is this.'" She said that it was difficult for her to get affiliate materials from HAO National because the national organization would only give materials to affiliates. She recalled, "I actually did get one set, but I didn't get any more when I asked." She noted that HAO was probably too busy to respond to her requests. Nevertheless, the national organization's lack of response to her led her to end her volunteer work. She explained, "I have lots of requests for my time. When I undertake a project and I don't get what I need to do the project, I tend to throw in the towel. I don't have time to argue." Providing one perspective from HAO National, Tobias said:

> Sometimes, we don't have all the money we want. … We just have to go with
> what we've got. And I think that sometimes that can be perceived as
> incompetence. Sometimes, their needs have fallen through the cracks and no one
> has followed through to make sure that, that person's needs are provided.

Letting things fall through cracks can result in losing volunteers; however, Tobias explained that HAO National is doing the best it can with the resources it has.

The need for better interpersonal skills and appreciation summarizes various instances that ultimately resulted in people ending their participation in HAO. Rebecca

stated, "Volunteers who have shown a commitment to the organization by their positive actions and work must be treated much nicer." For example, following a significant accomplishment, Meg said that she simply received an e-mail from HAO National that said, "Good work. Good luck." She commented, "There's no human contact. The e-mails and Internet are great, but that won't do." Praising someone via e-mail does not carry the same level of impact that personal contact has, and a generic four-word message of appreciation is insufficient for making people feel like their work is appreciated.

Participants also wanted to see HAO express more appreciation for volunteer-initiated projects. Rebecca, who is outside of Stateton, felt proud of the awareness week that her affiliate planned, so she wanted to present a display at the national convention. Her state organization's executive director complied with her request to e-mail other affiliates to see if they wanted to collaborate by forming a state display of awareness week events. Rebecca stated, "He sent out an announcement – with no encouraging words, thoughts or expressions about why others should participate. Leadership? Relationship-building? I don't think so." The executive director did not offer messages of warmth and encouragement, which Rebecca perceived as a lack of leadership.

Some people ended or nearly ended their participation with HAO when the organization revoked a leadership privilege without a mutually accepted rationale. According to Meg, a former executive director of HAO revoked her leadership privilege and explained that someone else wanted the privilege. Meg explained, "That was how my 15 years of service was ended and the relationship. I think there's a really bad problem with valuing people who have done work." Meg said that the person who gained the

privilege did not even fulfill the obligations of the role. Increased transparency and careful consideration of the implications of revoking leadership positions could help.

Staff turnover. Another factor that resulted in withdrawal from HAO is staff turnover, which numerous organizations face today. Some people felt weary from having to frequently train new staff who work with them and from enduring interruptions to how things are run. Meg said that paid staff members who are motivated by career opportunities rather than the cause have frustrated many people, including herself. She stated:

> [T]here are a lot of young people who come in, they get experience, it's a step in their career, and then they move on. And this is very troublesome for some of the older members.

Meg noted that this was a problem on the national and state levels. People like herself educate new people who "often don't understand what has been going on and don't carry on with the old thing." The loss of continuity is frustrating. Like many organizations today, HAO has retention problems, particularly when hiring people who are not fully committed to the health movement, and even then, employees could leave HAO for better positions at neighboring health organizations, which occurred during the study.

One of the most important positions for retention is the executive director position. Describing his experience on a council that consisted of all HAO state executive directors, Ken stated, "We'd have an annual meeting, or a biannual meeting, and a third of the room would be new people every year. People would turnover in a year or two – they were all floundered." Emphatically and slowly, Ken stated, "This is a tough job. This is a hard job. …This is a 15-hour day."

Through Ken's eyes, the major problem with retaining executive directors is that HAO does not spend enough money to hire people who are highly qualified. States often do not receive enough money from HAO National and lack adequate money of their own to hire someone with the three knowledge requirements of the public health system, legislative work, and business. Ken said that because of hiring underqualified applicants, HAO "unfairly puts them in positions where they were almost bound to failure, and that is why there was so much turnover." Ken expressed optimism about this situation improving, citing new hires who have strong backgrounds.

Disagreement with Decisions

Related to the previous theme, some people left or took breaks from HAO because they disagreed with the organization's or other members' decisions. Tara, who is outside of Stateton, said, "I'm boycotting the state." She explained that the state organization would not hire an executive director because two people persuaded enough members that having paid staff was bad for the organization. Tara stated:

> They're both very articulate, they do an incredible amount of work themselves, and feel that everybody else should do the same and then they wouldn't have to hire anybody. That's their belief. If everybody would pitch in and do their part, we wouldn't need paid staff, and it is undesirable to have paid staff because they're not one of us.

Tara said that the two people who insisted on not having paid staff treated anyone who was not with them "terribly." Many people agreed with her that an executive director was needed. She explained, "We had an all-day workshop, we developed goals, a position description, and the [names of people] would say, 'No, we can't do that.'" She said that

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many people acquiesced to the antagonists because they were tired of the confrontation. She explained, "They just moved along to get him off their back." Tara said that the national organization wanted to help, but it was not HAO National's place to take sides in a member dispute.

In addition to disagreement with other members' decisions, some people left because they disagreed with HAO's decisions. Amber explained that a group consisting of family members left HAO and created their own organization that excluded consumers. HAO turned down the new organization's request to keep teaching HAO's family course. She commented, "They weren't promoting participation in [HAO], they were promoting participation in their own group, which was encouraging the kind of segregation that we don't support." HAO did not allow the new organization to teach the program. Amber said, "I got two or three letters from the principals involved in that, demanding that their membership be terminated, and they didn't want anything more to do with [HAO]." Reflecting on this experience, Amber added:

> It's sad; they made some choices about some distinctions that they wanted to make and the kinds of services and attention made, but they were not consonant with [HAO's] eye on the prize… We're not all things to all people. Sometimes there are parting of ways, and sometimes that's amicable and sometimes it's not.

HAO adheres to its identity when making decisions, even when decisions motivate people to leave.

Some people disagreed with HAO's advocacy approach, believing it to involve either too much agitation or not enough agitation. Moreover, when some state executive directors took office, their style differed significantly from their predecessors. Meg stated

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that she is not too active in HAO, mostly due to health reasons "but also because I found that [HAO] had changed." Meg described, "It changed at the state level. One of the major disappointments for me was that the advocacy fell through." Meg commented that the leaders in her state organization have more of a friends-making approach than their predecessors had. She noted that this approach has been unsuccessful, as seen through the leadership's lack of inclusion in important state meetings.

To provide a more comprehensive picture, I want to note that HAO also uses more agitation than some people want. Amber described some of her message points for justifying an external report that was critical of public policy:

We need to rattle people's cages. That's what we're here for. Well, when you rattle people's cages, they get upset. Well, if you worry yourself that people will get upset, then you won't do what you're here to do. So you have to sort of make people comfortable and say, "It's okay if people get upset with us. That's the whole point. We're holding them accountable. They're going to be uncomfortable. Because you know what, the linen that we're washing in public is not clean. They're going to be embarrassed, or they're going to be uncomfortable with what we have to say. Well then maybe next time, they'll be better."

People disagree about how much agitation HAO should use, so the organization often uses communication to justify its approach and earn people's endorsement of it.

HAO state organizations also use communication to unite people in supporting its advocacy approach. In an article in a HAO state magazine, one author described her discovery that the best way to earn credibility with state employees is to treat them with respect. Although some people wanted HAO to be much more radical (Dan wants to

disassemble the state house "brick by brick"), they acknowledged that this is not the type of organization HAO has decided to be.

<center>Additional Findings</center>

In this section, I address findings that contribute to existing relationship theory literature, although they did not fit within this study's research questions. First, I discuss the value of relationship management and member retention from the perspective of a HAO staff member. Next, I discuss co-production as an indicator of the overall quality of an organization-public relationship.

<center>*Value of Relationships and Retention*</center>

Many public relations scholars have discussed the importance of relationships; contributing a perspective from the field is valuable. When I asked Amber about the value of relationships, she stated:

> It's no fun to be part of something that feels dysfunctional or malignant or any of those things. It means that if we want something from one another, it's much easier to get it in all directions, because the relationships are there, and you don't have to negotiate every transaction. … It greases the wheels somebody needs to … get going on. It's much easier to come out and go zero to 60 rather than taking the slow ramp up. … It encourages growth in the organization. If there's this sense of connectivity, then people want to draw other people in. If it feels like it's hard work and it's hostile, you don't bring other people into that fire. The organization is then ever shrinking.

Thus, relationships have value because they make participation in an organization enjoyable and because they are fundamental to an organization's growth. They motivate

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people to join and stay in an organization. They also enable an organization to act quickly.

In addition, Amber provided insight about the value of member retention. She commented:

> It's an indicator for us that we actually have a constituency. That we're not just representing ourselves, but we're representing a larger group of people. So for external purposes, it's useful because we can say, "We have X number of people who count themselves with us." For internal purposes, it's our way of knowing that we're actually meeting people's needs. If they count themselves in, then something we're doing is right.

Thus, member retention is externally important for credibility and internally important for fulfilling an organization's mission.

Co-Production as an Indicator of Relationship Quality

Members who trust an organization, are satisfied with it, feel committed to maintaining it, and are satisfied with the amount of power in the relationship engage in co-production behaviors, such as encouraging others to become involved in HAO. Stacey, who is highly satisfied, stated, "I tell everyone it's the greatest organization, not only for why I went there. You meet the greatest people. If you go to all of the things they offer, you'd have a complete, full life." Some interviewees encouraged me to get involved by attending the annual convention. Recommending the organization to others is an indicator of a strong relationship.

CHAPTER FIVE: DISCUSSION

The first goal of the study was to examine the perceptions of the relationship between members and their advocacy organization. The second goal was to assess the utility and expansion of relationship management theory by investigating one advocacy organization's relationship with members and former members. To reach these goals, I conducted a case study that included interviews with 39 staff members from the national, state, and local levels of HAO; interviews with 58 members, and interviews with 5 former members. In addition, I engaged in 49 hours of participant observation. For document analysis, I studied academic articles about the organization, internal reports, electronic communication, publications, and strategic planning documents. A summary of the results appears below, followed by interpretations for theory and practice.

Summary of Results

This section reviews answers to the research questions by summarizing findings about relationship types, cultivation strategies and tactics, and relationship stresses.

RQ 1: Relationship Types

Based on HAO's intentions, it has a communal relationship with members and former members. Based on members' perceptions, the most common relationship type is communal, followed by exchange and then contractual. Based on former members' perceptions, the most common relationship type is communal, followed by exploitative. From my perspective as a critic, I identified a new relationship type based on an affiliate's incompetence. Members and former members usually referred to their experiences with their affiliate when explaining their relationship type.

RQ 2: Cultivation Strategies and Tactics

HAO uses organizational management strategies, interpersonal strategies, and tactics to cultivate relationships with members.

Organizational Management Strategies

Organizational management strategies include driving resources for cultivation to the local level; delivering excellent core services, which exemplifies Ledingham and Bruning's (1998) strategy of investment; structurally giving members power over decisions; and promise making and promise keeping. HAO also uses strategies to cultivate relationships with members who are diverse through their racial background or sexual orientation, such as establishing a multicultural center, which is another way of fulfilling Ledingham and Bruning's investment strategy.

Interpersonal Strategies

In the early stage of relationship cultivation, staff members emphasized having a nurturing culture of giving by offering free services, by referring to members as "family," and by exceeding job requirements. Such actions represent the following strategies: access, assurances, and positivity (Hon & J. E. Grunig, 1999); investment (Ledingham & Bruning, 1998); stewardship (Kelly, 2001); interpersonal influence (Toth, 2000); favor (Huang, 2000), constitutive rhetoric (Burke, 1950), and the communication of relational messages (Bruning, 2000). Additional strategies that are especially important at the beginning of the relationship include establishing a culture of resistance to stigma and repairing members' relationships with their families, which represents constitutive rhetoric (Burke, 1950) and task sharing (Hon & J. E. Grunig, 1999), respectively. HAO also has a four-step process for cultivating relationships with diverse members, which

involves access, openness, symmetric communication, and dialogue (Hon & J. E. Grunig, 1999).

Interpersonal strategies that are prominent in the mature stage of HAO's relationship with members include conflict resolution strategies, frequent communication through various media, dialogue, recruitment, and appreciation. Appreciation represents Hon and J. E. Grunig's (1999) strategy of assurances. HAO also provides members with new reasons to stay in the relationship, such as volunteer work and advocacy.

Tactics

Several tactics for cultivating relationships fulfill Bruning's (2000) strategy of communicating relational messages and efforts. Tactics include educational programs, meetings, events, grants and scholarships, coalitions, and communications. Communications tactics consist of informal communications, magazines, newsletters, speeches, and electronic communications. HAO realizes that most of its membership is not online; however, it has prolific online activity to recruit the next tide of leaders, and it hopes that local staff will publish the information in their hardcopy materials.

RQ: 3: Members' and Former Members' Opinions of Strategies and Tactics

Members and former members shared their opinions about HAO's organizational management strategies, interpersonal strategies, and tactics.

Organizational Management Strategies

Numerous participants said that their trust in HAO developed by getting to know the staff, which underscores HAO's strategy of driving resources to the local level. In addition, many participants said that their strong relationship with HAO came from the organization's exceptional delivery of core services. People said that HAO cultivates a

relationship with them by making promises, by providing progress reports toward achieving promises, and by fulfilling promises. Shared control was unimportant to members. The few racially diverse people I interviewed knew little about HAO's organizational management strategies for cultivating relationships with diverse people and did not personally find meaning in them when I described the efforts.

Interpersonal Strategies

Interpersonal strategies that were meaningful to many members and former members include HAO's nurturing culture of giving, messages of solidarity to reduce isolation, words and actions to make people feel important, a culture of resistance to stigma, and repair of relationships with members' families. HAO publications suggest some successes with its strategies for cultivating relationships with diverse members. In addition, surveys indicated the effectiveness of using a leadership consultant to resolve conflict. Some but not all members praised the ground rules, despite not getting their way. Commitment to the organization was found to play an important role in keeping people together during conflict resolution. In addition, HAO's political achievements in Stateton suggest the effectiveness of using a coalition. Participants also identified communication, dialogue, and appreciation as successful strategies for cultivating the relationship. In addition, many participants enjoyed the opportunity to transition into new roles in their relationship with HAO, such as helping others cope.

Tactics

Meaningful tactics for participants include educational programs, meetings, state conferences and national conventions, and social activities, such as the awareness walk. Participants also praised HAO's use of personal contact, magazines, newsletters, and

grants and scholarships. People with online access mostly evaluated the Web site and electronic resources positively, while many people without access felt excluded.

RQ 4: Reasons for Decreasing or Ending Participation

The boundaries of HAO are permeable; people commonly fluctuate with their participation in the organization. People tended to decrease or end their participation in HAO for a combination of reasons. This discussion is organized by reasons that are external to HAO and reasons that are internal to the organization.

External Stresses

One of the strongest themes was that many people left HAO after getting what they needed from it. They did not feel compelled to give back to HAO, at least not immediately. Also, people appeared to decrease or end their participation due to stigma, especially in rural areas. Age and health challenges also resulted in decreased participation.

Internal Stresses

Some members felt discouraged because they felt that senior leadership in their affiliate prevented them from growing into leadership positions. In addition, participation in HAO was draining for some members due to the sadness that can surround the illness and due to interactions with emotionally charged members who are in crisis. Several members experienced burnout from taking on too much responsibility and from not feeling adequately appreciated. Meetings also posed problems due to uncomfortable interactions. In addition, perceived racism occurred. Some people left because they lacked an important responsibility in the organization and needed one to feel motivated to stay. Other people reported problems with staff, such as the need for better interpersonal

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skills. In rare cases, people decreased their participation or left when they disagreed with HAO's decisions, such as the degree of agitation HAO uses for political advocacy.

Additional Findings

Contributing to justifications for relationship management, HAO expressed that relationships are important for nimble operations, which is especially valuable in diffused, multi-tiered organizations, such as grassroots organizations. Good relationships help an organization grow, and strained relationships shrink it. In addition, HAO addressed the value of member retention. According to HAO, member retention gives credibility to an organization for external interactions and for internal validation that it is fulfilling its mission. Another finding is the correlation between people who have a strong relationship with HAO, as judged by J. E. Grunig's (2002) criteria, and the act of co-production. People with strong relationships encouraged others to get involved.

Implications for Public Relations Theory

Theoretical implications about relationship types, cultivation strategies, relationship stresses, and topics outside of the research questions are included below.

Relationship Types

The first research question is about the types of relationships that exist between HAO and its supporters. A more important question that emerged from this inquiry is how to best classify relationship types. As discussed in the second chapter, scholars have used different approaches for classifying relationship types. In some studies, researchers determined relationship types by the organization's intentions (e.g., Hung, 2005a). In other studies, relationship types resulted from publics' perceptions (e.g., Y. Kim, 2001). Most researchers acknowledged that studying the relationship from both the

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organization's and a public's side is ideal (e.g., Hung, 2007). This study's results expose

the lack of internal validity that can result from only measuring one side of an

organization-public relationship for classifying relationship types. In this way, this

study's results support the co-orientational approach to measuring public relations.

Co-orientation involves measuring the extent of agreement and accuracy that

organizations and their publics have about the relationship they share (Broom & Dozier,

1990). A coorientational study is best accomplished by having each party answer a list of

questions about each other and by having each party guess the other party's answers (J.

E. Grunig & Huang, 2000). The degree of agreement is one measure of relationship

quality. An independent person compares the answers and provides recommendations

(J. E. Grunig & Huang, 2000). This method helps organizations achieve a substantially

more comprehensive understanding of the organization-public relationship (J. E. Grunig

& Huang, 2000).

In this study, classifying relationships by an organization's intentions would yield

different results than classifying relationships from a public's perspective. For example,

what is intended as communal for HAO (continuing membership benefits without

charging dues because "they need us") is sometimes perceived as contractual by publics

(who think that they must be paying for membership since they still receive benefits).

In addition, the labels for relationship types also seem inaccurate if they were to

be solely based on publics' perceptions. For example, a former member views a

struggling HAO affiliate as exploitative; however, the affiliate at the time did not intend

to be exploitative and is viewed as incompetent at that point in time rather than

exploitative by myself and the supervising state HAO organization. One possible solution

is to use more precise labels. Claims to relationship types could be noted with the terms "intended" and "perceived," which was modeled in the fourth chapter. This would enhance the validity of relationship types, particularly for studies that only measure relationship types based on one party's perceptions. Furthermore, a new relationship type is an *incompetent relationship,* in which an organization is ineffective.

A finding that might initially surprise readers is that HAO has communal relationships with some former members. Many studies associate retention with strong relationships (Bruning, 2002; Bruning & Ralston, 2000; Bruning et al., 2004; Ledingham, 2003). In this case, I found many members with communal but strained relationships in HAO who were committed to staying, and I found people with communal relationships who ended their membership. Therefore, a communal relationship with members in the context of an advocacy organization does not ensure the stability that the literature would suggest. Based on the limited data about former members in this study, I account for this aberration by focusing on the context. People who ended their membership with HAO due to reasons such as time constraints or age appeared to not seek out an organization to replace HAO, whereas retention studies about phone service providers and universities focused on contexts in which the people who left entered a relationship with a competing organization. This type of finding would be in the same category as organizations that lose customers who no longer need their services. The relationship is not necessarily the problem. However, a difference for an advocacy organization context is that people can continue their relationship with an organization they neither need nor have time for through financial contributions if they can afford to make them.

Research about relationship types also resulted in theoretical insights about why people perceive communal relationships with organizations. People believe an organization genuinely cares about them when it helps them without asking for anything in return. This finding is not surprising given its proximity to the exact definition of a communal relationship. In addition, organizations should pay attention to creating a welcoming culture that minimizes barriers and promotes affective connections among members and with staff. Furthermore, staff members can use the strategy of consubstantiality by sharing their personal experiences with a cause, which can communicate a communal relationship. This is a unique message point for cause-related organizations. Demonstrating hard work, giving members assurances, and advancing members' personal interests can also result in cultivating a communal relationship. In addition, using constitutive rhetoric to redefine people's identities can result in a communal relationship. Providing hope, relieving guilt, and helping people recognize their importance can play an important role in identity building.

<center>*Cultivation Strategies*</center>

The second research question builds on the previous discussion by addressing cultivation strategies. This section begins with theoretical insights to organizational management strategies, followed by interpersonal strategies.

Organizational Management Strategies

This study offered three insights to organizational management strategies for cultivating relationships. It identified the local level as the place for cultivating relationships, and it contributed new strategies to the public relations literature: delivery of excellent core services, in addition to promise making and promise keeping.

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Relationship building at the local level. An interesting contribution to relationship

management theory is that in multi-tiered organizations, relationships with publics appear

to develop at the local level. A rival interpretation is that participants in this study

focused on their local relationship because HAO's relationship strategy is to cultivate

relationships at the local level. This interpretation is not better, however, because of the

limitations that higher levels have for cultivation. The ratio of staff to members (or

customers) for each level will nearly always favor the local staff. The state and national

staff are too small to connect on an individual level with members and former members.

Publications and electronic means of mass communication from the state and national

levels may impress members, but they do not appear to have more influence than

members' direct experiences with an affiliate, as represented by members' emphasis on

face-to-face experiences with the organization when describing the organization's most

significant cultivation gestures.

Delivery of core services. An essential cultivation strategy that is missing from

the public relations literature is the delivery of excellent core services. In this study, the

organization's core services were education, support, advocacy, and research. This study

shows that providing quality services (or quality products) is a necessity for cultivating

strong relationships with members (or customers). For example, many people referred to

HAO's educational programs and support as the most significant ways the organization

established a long-term relationship with them. Conversely, Candace quit HAO when the

organization did not provide the support she had expected to find.

Promise making and promise keeping. Although promise keeping represents

two-thirds of an organization's trust score, promise keeping is not yet conceptualized as a

cultivation strategy in the public relations literature. This study adds promise making and promise keeping as cultivation strategies for the public relations literature. Communication about promises that are made, the progress made toward achieving promises, and updates about fulfilled promises is a vital component of this strategy, which is already captured in the literature by Bruning's (2000) strategy of communicating relational efforts.

Interpersonal Strategies

An insightful contribution to public relations theory is that certain cultivation strategies play particularly important roles at different periods in a public's relationship with an organization. For example, emphasizing an organization's inviting culture, what Goffman (1959) might call the "front stage" of the organization, is particularly important at the beginning of an organization-public relationship. Finding new reasons for people to continue their involvement with an organization, after they have fulfilled their reasons for joining, is an important strategy for the mature stage of the relationship. This provides further sophistication to existing theory.

Organizational culture. A new cultivation strategy for the public relations literature is the establishment of an organizational culture that is favorable to producing long-term relationships. At the foundation of this culture is a genuine desire by both staff members and peers to be inclusive and to help one another. The metaphor of family, which can be used through constitutive rhetoric, is one way to foster this culture. Another way is to engage in a practice that I call *peer linking*. An organization engages in peer linking by bonding members together, which can in turn bond members to the organization through their shared experiences with it. Another way to foster an ideal

organizational culture is to give without requiring anything in return. Furthermore, staff members can foster a culture of genuine care by going beyond their job responsibilities to help members.

Culture of resistance. For organizations that represent people who face stigma and discrimination, a new strategy for the public relations literature is the establishment of a culture of resistance, where members regularly ridicule and repel stigma and stereotypes. Using constitutive rhetoric to redefine members' identities and to reinforce the lessons through speeches, online discussion boards, and opportunities for sharing stories are some ways to cultivate a culture of resistance. Reshaping and emboldening members' identities can be such a powerful life change that it can also cultivate a long-term relationship.

Diversity. According to J. E. Grunig's (1997) situational theory of publics, public relations people should focus on active publics with their messages if they want to maximize efforts; however, this context shows that targeting all publics with mass communication while interpersonally focusing on aware publics could be ideal. Adriana's prom metaphor is a colorful way to describe, explain, and prescribe approaches to diversity initiatives. Instead of focusing on people who are already on the dance floor (i.e., people who engage in diversity programs), people deciding whether to dance (i.e., whether to start diversity initiatives) should be the optimal target for an organization's limited interpersonal resources. Convincing undecided publics to get on the dance floor can help people outside the gym (i.e., people for whom diversity is not even an issue of interest) feel like they need to move indoors.

Conflict resolution. Plowman (2007) suggested that public relations scholars investigate people's reactions to mediators. In this study, an organization's mediator received glowing evaluations. One advantage the leadership consultants have is their dual position as both insiders and outsiders, which can be replicated in any multi-tiered organization. As insiders through their role as staff members, they have credibility because they possess an intimate understanding of the organization's history and culture. As outsiders to the affiliates, they can be viewed as favoring solutions regardless of the personalities involved.

This study introduces the strategy that I call *priming*. Priming involves seeking participants' commitment to consensus, which is not defined in the traditional way of earning each participant's agreement. Consensus is instead defined as deciding to be satisfied with an outcome that is in a range of acceptable outcomes, provided that participants feel that people understand their position, and they understand all other participants' views. An integral part of priming is the social construction of second and third choices that could be satisfactory, as opposed to leaving participants to feel as though they are either getting their way or not with one agenda. In addition, participants commit to attempting to integrate each other's interests in their decisions. Participants also agree to support a decision by not returning to debate it. Earning participants' commitment to this version of consensus occurs prior to discussing issues. Priming appears to be effective for some but not all kinds of people based on some people's disappointment with decisions.

In addition to priming, this study provides other theoretical extensions to the public relations literature. When navigating a situation with multiple conflicts, a

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successful strategy is to begin in the shallow end with easy conflicts before moving to deep conflicts. Doing so can result in early achievements, which can result in participants investing themselves more fully in the resolution process because trust can result from early successes. I call this strategy *conflict climbing*.

Another new conflict resolution strategy is *problem parking*. Problem parking refers to setting aside unresolved conflicts and agreeing to return to them at another time. Putting an issue in the parking lot can reduce exhaustion during conflict resolution while helping to preserve the sense of momentum and accomplishment that can result from conflict climbing.

Insulation is also a new conflict resolution strategy. Insulation refers to investing more into a relationship than is withdrawn from people not getting their way in decisions. This strategy resonates with Toth's (2000) discussion of establishing "reservoirs of credibility and trust." This strategy is supported by Timothy's reflection that people's commitment to the organization was the most important part of keeping the group together during the conflict resolution process. Investing more than the organization withdraws from disappointing decisions can cultivate people's commitment to an organization.

Recruitment for retention. A new theoretical link for the public relations literature is the connection between recruitment and retention. Bringing in new people lightens the workload and introduces vibrancy and excitement to volunteers. Methods to enhance recruitment could ultimately benefit retention. An awareness walk can be one of the best recruitment tools, which perfectly fits Dutta-Bergman's (2004) theorizing. Recruitment is a new cultivation strategy for the public relations literature.

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New pathways of purpose. A new cultivation strategy for a public in the mature stage of the relationship it has with an advocacy or activist organization is to provide new pathways of purpose for members once they have completed their original missions, which commonly focus on managing illness in this case. New pathways can include leadership opportunities within the organization, engagement in political and cultural advocacy, and assistance for new members who are in crisis. For people who do not desire face-to-face involvement with the organization, financial contributions can be one pathway to sustaining the relationship.

<center>*Relationship Stresses*</center>

This study introduces relationship stresses as a new category to relationship management. Identifying relationship stresses not only results in understanding why relationships deteriorate, but it also points to strategies that can mitigate stresses. Scholars can categorize stresses into external factors that do not relate to the organization and internal factors, which are specific to an organization's operations.

External Stresses

External reasons why people leave include no longer needing the organization, in addition to age and health. Leaving after an organization has fulfilled a public's need reinforces Cress et al.'s (1997) competition thesis in which people leave organizations due to other demands on their time. In this case, *competing demands* explain why people leave an organization after no longer needing it. To mitigate this relationship stress, organizations should focus on cultivating a communal relationship so that people will want to give back to the organization after having no personal benefit from it (other than benefits that result from the act of giving). Even with time constraints, people can

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continue a relationship financially if their budget allows them to do so.

Recommendations for cultivating a communal relationship and continuing it through financial means also apply to the relationship stresses of *age* and *health*. In addition, the literature should also include the insight that exiting a relationship due to competing demands does not preclude returning to the relationship later. This study suggests permeable boundaries, at least for advocacy organizations. Another external relationship stress that is relevant to some organizations is stigma. People may not want to self-identify as having an illness or other identity marker. Organizations can use public relations to combat stigmatizing portrayals while featuring heroes' courageous battles for the cause. HAO's program is an excellent model.

Internal Stresses

Organizations have more potential for mitigating internal factors than responding to external ones, because internal factors indicate that the organization itself might be the problem. One relationship stress occurs when the old guard of leaders does not transition responsibility and power to the next tide of potential leaders. I refer to this relationship stress as the *silver curtain.* A possible result for organizations that publics see as "rescuing them" or "saving their lives" is a desire to reciprocate through a lifetime of service. This is a tremendous relationship outcome; however, sometimes it also means that people do not want to release their grip on the organization. The silver curtain can discourage newcomers from giving back to the organization after it fulfills their needs. As suggested by Tobias, establishing rituals to honor an organization's pioneers, to recognize their lifetime of service, and to reward them for playing transitional roles can be ways to respond to this barrier.

Another relationship stress is what I refer to as the *emotion tax*. Although an organization can symbolize hope and be a lifesaver, prolonged participation comes at a price. Members may access core services for free; however, a hidden charge is the emotion tax they pay. Some people leave the organization once their emotional stamina is depleted and even return to the organization once they have rebounded from the bankruptcy, as explained by a member who referred to taking a one-year "sabbatical" from the organization. Emotional expenditures come from various sources. For advocacy or activist organizations, immersing oneself in a deeply involving cause can be an expensive burden, involving regular exposure to strife and tragedy. Regularly interacting with people who are emotionally charged from their personal struggles with the cause can exacerbate matters. Burnout from investing oneself too deeply can also deplete members' emotional stamina.

Two additional relationship stresses are what I call *relationship speeding* and *relationship stalling.* Relationship speeding is when someone breaks unofficial communication laws by asking someone to disclose information or take on a task before the relationship has advanced enough for those requests to be appropriate. People are comfortable with different speeds, so whether relationship speeding occurs is in the eyes of the recipient, and it could vary widely in interpretation – which is why this offense is so common. Advocacy organizations that regularly coordinate deep disclosure are especially prone to this violation, and local staff members should be trained to guard against it. On the flip side, relationship stalling occurs when a recipient wants to move forward with the relationship through increased responsibility; however, the relationship dies from a lack of acceleration.

An obvious category of relationship stress is what I call the *invisible isms*, which can be layered. In this study, it was racism; by extension, sexism, classism, ageism, heterosexism, and other related isms apply to this conceptualization. Although this category represents widely examined problems, they often occur without perpetrators or bystanders seeing them. According to Haraway (1988), people are not born with vision; however, they can achieve it by applying a critical lens to lived experience, by educating themselves, and by engaging in critical dialogue. Racism and other isms often fly under organizations' radar. Trying to fight peoples' prejudice is especially difficult when the issue is not acknowledged, making the decision to leave an organization more attractive than attempting to work out the problems.

Additional Insights

This study adds the term *capacity* to the areas of relationship outcomes and systems theory, it contributes the idea of *co-production* to relationship outcomes, and it identifies *organizational agility* as a new benefit of relationship management for the public relations literature.

Capacity

Capacity can be seen as new relationship outcome and as the revised goal of systems theory. An organization that has enhanced its capacity can not only accomplish its goals more easily, but it can also achieve goals that it may not have had the resources to achieve prior to its growth. For example, activities such as awareness walks, which result in funding for organizations, build capacity by increasing organizations' ability to provide new programs and establish paid staff positions. Any activity that grows an organization can be conceptualized as enhancing the organization's capacity.

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Relationship outcome. The closest existing outcome to capacity in the public relations literature is goal achievement. Capacity differs from goal achievement in that it suggests the ability to set and achieve more significant goals than a less stable organization could accomplish. Capacity enhances the ability to achieve more challenging goals than would otherwise be attainable.

Relationships help organizations achieve capacity. During my research, I found evidence for Amber's insight about relationships resulting in an organization's growth or reduction. She stated that when relationships are strong, people draw others into the organization, and when relationships are strained, people avoid bringing others into the "fire." People do not want to be a part of an organization that is "ever-shrinking."

Goal of systems theory. J. E. Grunig and L. A. Grunig (2000) stated that by following systems theory, public relations practitioners help an organization survive in its turbulent environment. They noted a shortcoming of systems theory by commenting that survival is a weak goal. However, based on the data in this study and Katz and Kahn's (1978) theoretical conceptualization about organizational energy, there is a compelling case for applying systems theory and declaring the goal to be capacity. The more resources an organization acquires, the more capacity it has to fulfill its mission and to build relationships with its communities. I propose capacity as a higher goal than survival for systems theorists in public relations.

Co-Production

This study identifies co-production as a parsimonious sign of a strong relationship, and it is the first public relations study to conceptualize co-production as a relationship outcome. The extent to which people would recommend an organization to

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others could be used as an overarching assessment of the organization-public

relationship. Whether people have engaged in co-production could also be used as

evidence of a strong relationship.

Organizational Agility

A new outcome of organization-public relationships – as defined by Amber – is

that relationships "grease the wheels" of an organization so that it does not have to take

"the slow ramp" to its goals. Without functional relationships, an organization cannot go

from "zero to sixty," in Amber's words. Thus, this study contributes a new relationship

outcome by showing that strong relationships result in organizational agility.

<div align="center">Implications for Practice</div>

Recommendations for practice are based on this study's investigation of

relationship types, cultivation strategies and tactics, and relationship stresses.

<div align="center">*Relationship Types*</div>

Public relations practitioners can consider the following recommendations based

on relationship types:

- Realign management's mindset toward a mutually beneficial worldview if it does

  not already exist, and if management does have this worldview, focus on

  communicating efforts that demonstrate the organization's concern.

- Encourage financial contributions as a way for former members with communal

  relationships to continue their relationship with the organization.

In addition, practitioners can take the following actions to cultivate communal

relationships:

- Offer core services for free.

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- Remove potential barriers to feeling welcome in the organization.

- Publicize hard work for a shared cause and use relational messages.

- Volunteer to perform favors for members.

- Feature staff members' personal connection to the cause.

- Improve people's self-concept.

Cultivation Strategies

Many strategies that emerged from this study are common sense to practitioners. This section represents the most insightful recommendations. Organizational management strategies include the following:

- Drive public relations resources to the local level, which can be the most powerful location for building a relationship with a public. Give the local level both the resources and authority to make strategic decisions about the best ways to build relationships with local publics.

- Maximize donations by giving supporters the freedom to donate to any level of a multi-tiered organization, given that people's strongest connection with an organization is often at the local level.

- Conduct interpersonal training for all local staff who interact with publics. Layer training with communication tips in internal publications.

- Scrutinize an organization's communication to ensure that only achievable promises are made.

Practitioners can use the following interpersonal strategies to cultivate relationships:

- Establish a welcoming, nurturing culture of giving. Build a sense of shared commonality between staff and members.

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- Recruit members to reduce burnout among existing members.

- Continually express appreciation and recognize volunteers, especially those who perform the less glamorous work of helping with an organization's daily operations.

- Promote new reasons for publics to stay in an organization, particularly after they have satisfied their reasons for joining it.

- Use a mediator from a higher level of the organization to resolve heated conflicts in local branches of an organization, prime participants before conflict resolution by setting ground rules, start with the easiest problems to resolve, and park problems for a later day when participants feel exhausted.

- Insulate members from frustration and disappointment by making more investments in the relationship than withdrawals.

In addition, public relations practitioners can take the following steps to increase diversity in their organizations:

- Identify diverse people who are already interested in the cause and establish relationships with organizations that represent people of different backgrounds.

- Listen to the needs of desired communities.

- Partner with a member of the desired community to humbly approach community members.

- Sustain efforts, even when improvement is not readily attained.

Cultivation Tactics

This section highlights insights about tactics that are most likely to introduce a fresh perspective to practice.

- Use identity-building rituals, such as awareness days, weeks, or months; awareness walks; local conferences; and national conventions. Provide educational programs that feature facts and testimonials to help participants shun stereotypes and view their shared identity in an empowering way.

- Use social events involving physical activity to attract active members.

- Plan informal and formal events to boost morale, relieve stress, and show appreciation.

- Follow up written materials with informal communication, such as a phone call, to solidify members' commitment to engage in an action.

- Use magazines and newsletters to build trust by communicating promises, status reports, and achievement of promises. Include columns by participants to build a sense of community and connection.

- Consider issuing special print editions of featured online content to prevent people who are not online from feeling left out.

Practitioners who want to focus on diversity outreach can adopt the following tactics:

- Establish task forces and consult them for cultivation strategies, host special meetings at conferences and conventions for diverse members, designate a newsletter or at least a column to diverse members' interests, and set up online discussion areas for members with shared identity markers.

- Provide scholarships to attend important meetings, which can give diverse members' leverage in the organization.

Practitioners should keep in mind that tactics are not as important as establishing an organizational culture that eradicates racism and other isms.

Relationship Stresses

This section presents relationship stresses and solutions to mitigate them.

- Competing demands, age and health: Find ways to continue the relationship that involve minimal activity, such as participating in an organization's online petitions or providing financial contributions.

- Refusal of senior leadership to transition power to the next generation: Honor senior leaders for lifetime achievements and reward them for mentoring new leaders. Establish separate organizing places for young leaders if integration fails and designate a liaison to coordinate with the senior group.

- Emotional stress: Plan social activities and emphasize hope in the organizational culture. Share inspirational stories.

- Racism and other isms: Train local staff to identify and eradicate occurrences of isms, which are often invisible to people.

An organization should conduct research to identify which relationship stresses are most prominent for its target public and then develop a public relations program based on them.

Co-Production

Practitioners could incorporate the concept of co-production in the public relations process. The first two steps of the public relations process are research and planning (Cutlip et al., 2006). During research, practitioners could ask publics to rate the extent to which they would recommend the organization to others and to explain why. In the planning phase, practitioners could recommend a program based on publics' responses. Evaluation research would then measure changes in the extent to which people

would recommend the organization. In addition, co-production could be a parsimonious method for short-term evaluations of events and programs.

Data Selection for Results Section

Validity of this study, despite the omission of some data, and research practices I would like to adopt for future studies are discussed below.

Validity

The data that were omitted from this study to be sensitive to participants did not impact the study's results. I achieved saturation (Glaser & Strauss, 1967), used member checks (Miles & Huberman, 1994), and followed guidelines to fulfill Kvale's (1995) quality of craftsmanship. These steps enhanced the study's validity.

Future Research

Through the experience of studying participants and an organization that I support, I believe that for future research, I would benefit from a personal ground rule to help me retain my identity as a researcher throughout the research process and to resist a potentially dominant role as an organization's advocate. As a personal ground rule for future studies, I would like to strive to keep my role as a researcher present during interactions with participants by verbally relating participants' accounts to the resulting report during data collection. This would serve as a reminder to participants and myself that the information being disclosed would possibly appear in the report. In addition, instead of waiting to take notes until I am not with participants, in future studies I will take notes during participant observation as a visual reminder to participants and to myself of my role as a researcher. This action might have helped Ellis (1986, 1994) avoid participants' accusations that she covertly collected data under the guise of friendship.

Rakow (1991) appeared to avoid such problems, and she asserted that her participants always recognized her identity as a researcher.

I enjoy the hope provided by Weinberg (2002) that participants and a researcher can engage in consciousness-raising through the dialectical tension between their perspectives. Other than disagreement about whether HAO should have its name revealed, I did not perceive tension between HAO and myself; however, I would like to be prepared for significant tension for future research. For future studies in which critique upsets participants, even after I have searched for more valid interpretations, I can ease the discomfort by striving to be fair. For example, giving participants the opportunity to voice their disagreement and to explain their rationale is one way to respect and honor participants' interpretations (see Wolcott, 2001b).

In addition, for future studies, I would like to follow Radway's (1984) example of validating participants' interpretations and using them as a foundation and anchor for my own interpretations. Radway critiqued the ways women use romance novels. Although critical accounts, including her own, for reading romance novels differed from romance readers' interpretations, Radway argued for the truth in both versions by grounding her critique with truths from participants' interpretation. Furthermore, she provided several questions and qualifications to participants' and her own interpretations, which seemed to invite the reader to enter the discussion. Radway's approach is reminiscent of an iceberg. She validated participants' accounts of what the iceberg looked like and treated the accounts as axiomatic in the overall explanation of the iceberg, while simultaneously providing a more extensive, deeper account of what may be beneath the surface, which is not necessarily seen by participants. While asserting the truths of the iceberg tip, as

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described by participants, she positioned her vision as partial, provided instructions for further research, and invited readers to join the conversation about interpreting the hidden part of the phenomenon. This is the type of critique I would like to pursue for future research.

<center>Limitations</center>

Although the omission of harmful personal anecdotes did not prevent a theme from being represented, the exclusion of this data diluted the potency of the context that this study depicted. This omission partially muted participants' voices and thus suppressed a more vivid understanding of the organizational climate. Moreover, scholars use a results section so that readers can examine the data for themselves and make decisions that are independent of the scholar's assessments. By omitting certain personal anecdotes, readers did not have the opportunity to make independent judgments about the data and must instead rely exclusively on my interpretation.

Furthermore, HAO's decision to keep its name confidential enshrouds the organization with an additional layer of secrecy. The choice contrasts with the organization's history of making great strides in eradicating stigma and encouraging people to be open about their particular illness. The organization's decision to cloak its identity removes critical context to which this study and resulting theory best apply. Due to search capabilities on the Internet, many direct quotes, common sayings in the organization, and the organization's names for programs were paraphrased with generic terms. In addition, references that would have given away the illness were reworded to remain ambiguous, and the organization's names for programs were excluded. Readers'

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ability to appreciate the context, voice, and depth of participants' struggles was also limited by this decision.

The study's delimitations of focusing on members and former members in one state also limited the results. Based on discussions with state and affiliate staff from various regions, in addition to discussions with the national staff, I recognized the importance of a state and region's local culture for cultivating relationships. I captured a flicker of this in identifying that the fear of stigma seems more pronounced in rural areas than in urban areas. I expect that studying a larger diversity of regions would have resulted in theoretical insight and practical implications for the role of geographic culture in shaping both relationship stresses and cultivation strategies. Nevertheless, due to time constraints, focusing on one state was the best way to produce quality results.

In addition, few former members participated in the study, and the ones who did could fundamentally differ in their answers from ones who did not. Consequently, a significant part of the discussion of relationship stresses in the fourth research question is secondhand information from staff rather than first-hand experience from former members. Studying relationship stresses among people who have exited a relationship is challenging, and given this barrier, I was grateful to get as much information as I did. That said, I also acknowledge that the data from this section is not as robust as the data from other research questions. The notation of when themes come from staff and when they come from members or former members allows readers to weigh the credibility of the data.

Also, the overwhelming majority of participants were white women, which significantly limits the range of experiences represented. One benefit of studying an

organization that lacks requisite variety and seeks it is the ability to investigate the

organization's efforts in this area. Studying successes and failures with multicultural

outreach was a serendipitous research opportunity.

Finally, conducting participant observation at all levels of the organization or at

least at the affiliate level would have enabled a more comprehensive view than confining

participant observation to the national office. During interviews, people described their

versions of interactions. Witnessing the interactions and having the opportunity to

identify and interview people on all sides of the interactions would have provided more

encompassing insight.

<center>Future Research</center>

This study suggests several areas that would be useful to explore. One area of

particular interest comes from Jeremy's request to discover how to recruit and build

relationships with the population that Googles into HAO's Web site 17,000 times a day.

Engaging the next tide of leaders is an area of interest that comes from the field, which

public relations scholars can study and address. Another rich area for study that is

underdeveloped in the literature is relationship management in multi-tiered organizations

and particularly, the organization-public relationship between the levels of staff members.

Another insightful area would involve the investigation of cultivation strategies as an

organization-public relationship matures over time. Studies of organizational culture,

geographic culture, and their influence on relationship management could also be

insightful. In addition, further exploration into efforts to diversify a membership base

could result in great value. Scholars can also conduct research about the relationship

between the outcome of co-production and Hon and J. E. Grunig's (1999) outcomes of

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trust, commitment, satisfaction, and control mutuality. Another promising area for public relations research is investigating textual strategies for cultivating relationships. Also, personal relationships emerged as central to relationship development, so further investigation of interpersonal cultivation strategies and related topics, such as employee retention, could also be important. Finally, additional investigation into relationship stresses is warranted to advance theory and to help practitioners meaningfully respond to challenges in the organization-public relationship.

Significance of Findings

The research in this study about relationship types is significant because it demonstrated that classifying a relationship type by either an organization's intentions or a public's perceptions could result in flawed conclusions. It empirically justified Broom et al.'s (1997) assertion that elements of a relationship can be hidden to the parties involved and that a critic's perspective can be fundamental to assessing relationships. It also broke ground by resolving a critic's problem of classifying a relationship type when an organization's intentions differ from publics' perceptions. Another reason why this study is significant is that it introduced an *incompetent relationship* as a new relationship type. In addition, this study is significant because it identified cultivation strategies that could result in communal relationships. Furthermore, this study is unique through its situation of having people who left the organization who still have communal relationships with it. Identifying this issue and pointing to low-energy ways to continue the relationship is an important addition to the literature that is unique to public relations for advocacy and activist organizations.

The incidence in this study of the organization's communal efforts being mistakenly perceived as contractual obligations by some participants is a twist on J. E. Grunig's (1993) discussion of symbolic versus behavioral relationships. It points to the importance of communicating the relationship efforts an organization makes, so publics view them as voluntary efforts rather than perceiving them as contractual requirements. This difference affects the type of relationship people perceive, and since communal relationships are most strongly associated with desired relationship outcomes (e.g., J. E. Grunig, 2002), this lesson could make a significant difference for organizations in similar situations.

This study is significant to public relations through its theoretical advancements. It is unique in its identification that certain cultivation strategies are particularly important for different stages of the organization-public relationship. As publics mature in their relationship with an organization, different needs and opportunities arise. In addition, this study incorporated the delivery of core services, in addition to promise making and promise keeping, as cultivation strategies. It also established a theoretical link between retention and recruitment. Furthermore, this is the first public relations study to claim that favor is a cultivation strategy that organizations use in the United States. As described in the second chapter, Huang (2001b) and Jo (2003) positioned the strategy of favor as unique to countries that share similarities to East Asian culture. In addition, this study responded to Plowman's (2007) call for public relations scholars to examine people's satisfaction with the use of mediators in disputes. This study also presented priming, conflict climbing, problem parking, and insulation as new conflict

resolution strategies for the public relations literature. Moreover, this study is significant because it presented insights about cultivating relationships with diverse publics.

This study established pioneering groundwork for theory about organizational culture in public relations by establishing it as a cultivation strategy and by providing instructions for fostering it. This study responded to Sriramesh's (2007) comment that public relations lacks the integration of culture in its theories. Sriramesh identified organizational culture as an unexplored area. The cultivation strategy of establishing a culture of resistance is also new to the public relations literature and applies to organizations that represent people with shared markers of identity.

In addition, this study broke ground in relationship theory by contributing the category of relationship stresses to the public relations literature. This study identified relationship stresses and accompanied them with cultivation strategies to mitigate the pressure.

Appendix A: Solicitation of National Organization

Date: August 1, 2005

Subject: UMD Study

Dear [First Name],

I hope your summer is going well. This is Tiffany, Linda Aldoory's Ph.D. student, who interviewed you last year about your public relations strategies.

I am wondering if you would be receptive to having me write my dissertation about [HAO]'s strategies for developing and strengthening its relationships with [HAO] members. I am looking for an organization that I can conduct a case study for about membership retention in an activist organization. You could decide whether the organization's name would be used or whether a pseudonym would be used.

I was impressed by what I learned about your work last year, and your Web site demonstrates exceptional, strategic ideas for communication.

My dissertation study would involve spending time at your office, in addition to interviewing your staff members, current [HAO] members, and former [HAO] members. I am unsure of how many interviews I will need. Other people who have completed my program have conducted 40-50 interviews.

I would need to conduct the interviews between October 1 and December 20 of this year. I would also want to analyze the communication materials you write for your members. The project would be completed by July 2006.

Please let me know if you might be interested in this project. I am more than happy to meet with you in person or to talk over the phone to discuss this endeavor in greater detail. E-mail works well for me too. Thank you for your consideration.

Sincerely,

Tiffany Derville
[Cell phone number]
http://www.comm.umd.edu/people/students/tderville.html

Appendix B: Solicitation of State Organization

Date: January 13, 2006

Subject: Invitation to Participate in an Independent [HAO] Membership Study

Dear [First name],

Hi, my name is Tiffany Derville, and I am a Ph.D. student in the University of Maryland's Department of Communication. I am conducting a case study of [HAO] for my dissertation, which is about how organizations can build lasting relationships with their members. I selected [HAO] because I believe in the work that you do.

[Andrea] referred me to states and affiliates to potentially contact and she included you on the list; however, I will not disclose whether I invited you to participate or whether you chose to participate, and participation is voluntary.

I am wondering if your state organization and local affiliates would partner with me on this independent study by inviting the participation of [HAO Stateton] members and people who may have drifted from [HAO]. I would like to interview your staff as well. Participation would involve a one-hour phone interview at a time that is convenient to participants. An optional additional interview might be requested if more time is needed to answer the questions. Participants would also have the option of reviewing the study's preliminary results and offering their opinions of them at a later date.

Participation in this study is voluntary for states, affiliates, and individuals. Participants are welcome to not participate or to participate in just the first interview. They are also welcome to skip questions, end the interview, or decline being interviewed at any time.

This study is confidential for states, affiliates, and individuals. [HAO Stateton] may decide to disclose its name in the report to [HAO] National upon reviewing an executive summary of the study, and [HAO] National will decide whether to disclose its name in the study after reviewing an executive summary of the study's results. All other names, including participants' names, state names, and affiliate names, will be kept confidential. There is always the possibility of a security breach, although I will do everything I can to prevent this.

Whether a state and affiliate choose to help with the study is confidential, and answers will never be linked with names. I have a sample of the wording you could use for an e-mail or letter to invite participants. If you send a letter, I would be happy to provide the postage. I have attached the sample wording to this e-mail.

I am wondering if I may call you next week (Jan. 16 through Jan. 20) at a time that is convenient to you to discuss this study. I am hoping you could suggest a date and time.

If you feel more comfortable speaking with my advisor, Dr. Linda Aldoory, who is overseeing the study, you are welcome to contact her at 301-405-6528 and laldoory@umd.edu. She is a former [HAO] volunteer.

I appreciate your consideration of helping me with this study.

Sincerely,

Tiffany Derville
University of Maryland
Department of Communication
2130 Skinner Building
College Park, MD 20740
Phone: [Cell phone number]
E-mail: derville@umd.edu

Appendix C: State Organization Letter to Participants

The letter that the organization sent fit on one page.

February 16, 2007

[Name]
[Address]
[City, State, Zip]

Dear [HAO] Member or Former [HAO] Member:

A doctoral student at the University of Maryland is studying [HAO] for her dissertation about how organizations can build relationships with their members. She selected [HAO] because she believes in our goals to improve the lives of people who live with [name of illness] and their families.

She is interested in interviewing current and former [HAO Stateton] members to learn about their experiences with their local affiliate, [HAO Stateton], and [HAO] national. She is studying what [HAO] does well, and she would like to identify strategies to help [HAO] improve at every level.

[HAO]'s strength is its members. [HAO] affiliates across the country are struggling to recruit and maintain members. The lack of active participation on the part of members is crippling local affiliates. We need your help in identifying possible reasons that keep people from becoming actively involved with [HAO].

Participation in this study is entirely voluntary. Participation would involve a phone interview at a time that is convenient to you. You are welcome to not participate, to participate in just the first interview, skip questions, end the interview, or decline being interviewed at any time.

This study is confidential. [HAO] will decide whether to disclose its name in the study after reviewing an executive summary of the study's results. All other names, including your name and affiliate names, will be kept confidential. No one, including myself, will know whether you participate. Whether you choose to help with this study is confidential, and your answers will never be linked with your name.

To share your opinions about us in this independent study, you may schedule an interview by contacting Tiffany Derville at 1-800-704-0941. You may call at any time. The best time to reach her is on Mondays and Wednesdays between 9 a.m. and 10 p.m. I have listed her contact information below. You are welcome to write her a letter, call her, or e-mail her.

Tiffany Derville, Doctoral Student   derville@umd.edu
University of Maryland   Toll Free: 1-800-704-0941

Department of Communication
2130 Skinner Building
College Park, MD 20742-7635

I appreciate your consideration of lending your expertise to this study. Your participation could provide vital information for strengthening our voice.

Sincerely,

[Name]
Executive Director

Appendix D: National Staff Recruitment E-mail

Date: January 13, 2006

Subject: Chance to share your thoughts about [HAO] and the "[HAO] family"

Dear All:

[HAO] is working with a researcher from the University of Maryland on a case study of how [HAO] builds lasting relationships with its members. The researcher, a graduate student working with Dr. Linda Aldoory (a former [HAO] intern with [Evan]), chose [HAO] because she believes in our work and is excited by what she sees us doing. This research will form the basis of her dissertation.

The researcher is interested in interviewing staff members who work with our members, as well as to staff members who would simply like to share their opinions about [HAO]'s member relations.

Interviews will last about an hour. An optional follow-up interview may be scheduled at your discretion. Participation is ENTIRELY VOLUNTARY and you can skip questions, end the interview, or decline being interviewed at any time. Participation is also ENTIRELY CONFIDENTIAL. Neither I nor anyone other than the interviewer will know that you have participated. Interviews can take place at times and locations convenient to you. (Given the researcher's time constraints, interviews do need to occur *within the next three weeks*.) The researcher is also talking with [HAO] affiliates and state organizations, as well as some individual members.

Participants will have the option to review the study's preliminary results and offer additional input at a later date. When we see the executive summary, [HAO] will make a determination about whether we will have our organization's identity revealed in the publication. Regardless, we'll have the benefit of the information and insights gathered.

IF YOU WANT TO PARTICIPATE: contact the researcher as indicated below. You can also talk with Dr.Linda Aldoory, her advisor, at 301-405-6528 / laldoory@umd.edu

Tiffany Derville, University of Maryland, Department of Communications

Phone: [Cell phone number]

Email: derville@umd.edu

As a result of her first introduction to [HAO], Tiffany has become a [HAO] volunteer and even walked with the [HAO] Travelers at [HAO] Walks DC. She will join us at the January Allstaff so you can put a face to her name.

I have been interviewed and I found the questions and discussion both very interesting and rewarding. I encourage you to participate as well!

[First name]

[First and last name]

[Title]

[HAO] National

[Address]

[Phone number]

[E-mail address]

Appendix E: Post-Conference Call Solicitation

Date: March 8, 2006

Subject: Membership Questions

Tiffany Derville, a doctoral candidate at the University of Maryland, has selected [HAO] as the organization to study for her dissertation on membership retention. She participated in the ED Group conference call this morning in an effort to get feedback from you as Executive Directors on membership issues. Due to limited time on the call, we asked her to send us her three questions along with her contact information for distribution to this group.

Please feel free to respond honestly to Tiffany's questions. She will be presenting the information as a case study of a private non-profit, [HAO] will be anonymous, as will your comments to her. The questions are as follows:

1. What are your strategies and ideas for improving [HAO]'s member retention?

2. What are your thoughts about the ideal way that the membership process should work (including how it is organized)?

3. What qualities do you think are important to building relationships with members and what strategies or ideas do you have for developing these qualities in the relationships that [HAO] builds with its members?

You can send your responses to Tiffany at derville@umd.edu, or call her at 1-800-704-0941.

(First name, middle initial, last name, degrees)

[HAO] Regional Leadership Consultant, [Region]

[Address]

[Office phone]

[Fax]

[Cell phone]

Appendix F: Former Board Member Outreach

February 27, 2006

[Title and name]
[Address]

Dear [Name],

I hope that the new year is finding you well. I haven't heard from you in a while, and I wanted to check in with you to see how things are going. Things are going well on our end. We have been busy as usual, debunking stigma, educating the public, supporting our [HAO] family members, and lobbying for a better health system. Our latest initiative is a state evaluation report that will be revealed on March 1 – we have been working around the clock on it!

A researcher from the University of Maryland is conducting an independent study of [HAO]'s relations with its supporters for her dissertation. I thought your insight would be particularly helpful. Of course your participation is optional and confidential. If you are interested in helping with the study, you may reach her at 1-800-704-0941 or derville@umd.edu. Her name is Tiffany Derville. I have enclosed her business card. The study would involve a one-hour phone interview at a time convenient to you.

I am looking forward to catching up with you and hearing about how you have been. My phone number is [direct line phone number], and my e-mail address is [e-mail address].

Very best wishes for a wonderful 2006,

[Name]

A personalized handwritten note appeared here on the letter.

Appendix G: Staff Protocol for Interviews

I placed italics and parentheses next to questions to relate the questions to the theoretical concepts. The questions that are labeled trust, control mutuality, commitment, and satisfaction were either taken directly from J. E. Grunig's (2002) protocol, or I closely adapted them.

Introduction
Hi, my name is Tiffany Derville. It is nice to meet you. Thank you for helping with my dissertation study; I greatly appreciate it. As mentioned in [name of person]'s e-mail, this study is about [HAO] and its membership. This information will be used in a report for [HAO], and it could also be used in publications to help communication scholars learn about developing relationships with people who matter to their organizations. Throughout all reports and publications, your identity will be kept confidential.

Consent
With your permission, I would like to record our conversation with an audiotape so I can accurately interpret it. I will destroy the tape on or before December 1, 2007. Only my advisor and I will have access to the tapes. Do you feel comfortable with my use of a tape recorder for our discussion? [Review informed consent form and collect signed form.] Do you have any questions before we start?

Questions
I would like to start by asking some general questions about your job.

1. What is it like to work at [HAO]? *(Grand Tour)*

2. How long have you worked at [HAO]? *(Grand Tour)*
    a. Follow-up: How have things changed since you joined [HAO]?

3. Tell me about your job. *(Grand Tour)*
    a. Follow-up: What activities do you do in a typical day?
    b. Follow-up: What do you enjoy about working at [HAO]?
    c. Follow-up: What are some of the challenges in your job?
    d. Probe: How do you attempt to overcome these challenges?

4. What does [HAO] mean to you? *(Grand Tour)*

Now I would like to ask some questions about the national, state, and local offices.
5. What are your opinions of the national staff? *(Grand Tour)*

6. What are your opinions of the state leaders? *(Grand Tour)*

7. What are your opinions of the local leaders? *(Grand Tour)*

8. What are your opinions about how the national, state, and local levels of [HAO] work together to help members? *(Grand Tour)*

      a. Follow-up: What is working well with this process?
      b. Follow-up: How can this process improve?

Now, I would like to ask you about [HAO]'s membership.

9. What types of interactions do you have with [HAO] members? *(Grand Tour)*
      a. Follow-up: How would you characterize those interactions?
      b. Follow-up: What are the challenges of those interactions?
      c. Follow-up: Tell me a story about a positive member interaction.

10. What are the first things that come to mind when thinking of [HAO]'s membership retention? *(Outcomes)*

11. How does the membership process work? *(Grand Tour)*
      a. Follow-up: Are there particular ways that members are recruited?
      b. Follow-up: What happens when a member joins your organization?
      c. Follow-up: Do you do anything if a member has very low participation levels?
      d. Follow-up: How does the renewal process work?

12. How do you attempt to build relationships with members? *(Strategies)*
      a. Follow-up: What do you think about your efforts?
      b. Follow-up: How does [HAO] attempt to build relationships with members?
      c. Follow-up: What do you think of these efforts?

13. What do you think of the communication materials that [HAO] develops for members? *(Outcomes)*
      a. Probe: What do you think of its Web site?
      b. Probe: What do you think of its e-mail updates?
      c. Probe: What do you think of its newsletter?

14. Describe the role of your communication materials in developing relationships with members. *(Strategies)*

15. To what extent do you believe [HAO] considers its members' interests in its decisions and behaviors? Why? *(Control Mutuality, Strategies, Outcomes)*

16. To what extent do you feel that members have some control over what [HAO] does that affects them? Why? *(Control Mutuality, Strategies, Outcomes)*

17. Would you describe any things that [HAO] has done to treat its members fairly and justly or unfairly and unjustly? *(Trust, Strategies, Outcomes)*

18. Would you describe things that [HAO] has done to demonstrate that its members can rely on it to keep its promises? *(Trust, Strategies, Outcomes)*

19. Are there things that [HAO] has done to undermine this trust? *(Trust, Outcomes)*

20. To what extent has [HAO] demonstrated to members that it can accomplish what it says it will do? *(Trust, Strategies, Outcomes)*
    a. Follow-up: Can you give me examples of why you feel this way?

21. Can you provide examples that demonstrate how [HAO] has shown members that it wants to maintain a long-term commitment to a relationship with them? *(Commitment, Strategies, Outcomes)*

22. Can you provide examples when [HAO] undermined this sense of commitment to a long-term relationship? *(Commitment, Outcomes)*

23. What do you think members would miss if they ended their participation with [HAO]? *(Continuance Commitment, Strategies, Outcomes)*
    a. Follow-up: How has [HAO] delivered these benefits?
    b. Follow-up: How does [HAO] communicate these benefits to members?

24. Do you believe that members feel morally obligated to support [HAO]? *(Normative Commitment, Strategies, Outcomes)*
    a. Follow-up: Are there ways in which [HAO] emphasizes this moral obligation to members?

25. Do you feel that members are emotionally bonded with [HAO]? *(Affective Commitment, Strategies, Outcomes)*
    a. Follow-up: Are there ways in which [HAO] develops emotional bonds with members?
    b. Follow-up: Has [HAO] done things to increase a feeling of an emotional bond toward it?
    c. Follow-up: Has [HAO] done things to decrease a feeling of an emotional bond toward it?

26. How satisfied are you with the relationship that [HAO] has with its members? Why? *(Satisfaction, Strategies, Outcomes)*

27. Have you ever surpassed what [HAO] required you to do that resulted in helping members? *(Relationship Type, Strategies)*
    a. Follow-up: Tell me about this experience.
    b. Follow-up: Why did you decide to do this?
    c. Probe: Did you do this because you expected a reward in return? *(Exchange)*
    d. Probe: Did you do this because you genuinely care about members, regardless of your job requirements? *(Communal)*

28. Have you ever not met a member's expectations of you? Please explain. *(Outcomes)*

I would now like to ask some questions about people who are no longer [HAO] members.

29. Describe characteristics of [HAO] members who do not stay with the organization. *(Outcomes)*
    a. Follow-up: Would you describe some examples of people who have left the organization without identifying anyone by name?

30. Why do you think members end their participation with [HAO]? *(Outcomes, Stresses)*
    a. Follow-up: What signs, if any, have you identified that indicate that a member is unsatisfied?
    b. Follow-up: What signs, if any, have you identified that indicate that a member is satisfied?

31. Do you have ideas for improving [HAO]'s member retention? *(Strategies)*
    a. Probe: What are they?

32. Why do you think members continue their participation with [HAO]? *(Outcomes)*
    a. Probe for stories to support accounts.

33. Is there anything you would like to add that is important to [HAO]'s member retention? *(Outcomes)*

34. Do you have any questions for me?

35. Finally, I am wondering if I may contact you at a later date to share the preliminary analysis for this study and invite your feedback. How would you prefer for me to contact you?

This has been so helpful. Thank you very much. I greatly appreciate your insights. Enjoy the rest of your day.

Appendix H: Member Protocol for Interviews

I placed italics and parentheses next to questions to relate the questions to the theoretical concepts. The questions that are labeled trust, control mutuality, commitment, and satisfaction were either taken directly from J. E. Grunig's (2002) protocol, or I closely adapted them.

Phone Introduction
Hi, is [name of person] there? Hi, this is Tiffany, the student who is conducting the [HAO] study. Is now still a good time to talk?

I would like to start by giving some background about this study. I am a Ph.D. student at the University of Maryland. I am earning my degree in communication. This study is my dissertation project, which is my last requirement for the degree.

I chose this organization because I believe in the work that [HAO] does. My study is focused on studying [HAO]'s relationships with their members. I am looking to identify what [HAO] is doing well and how they can improve.

I have an ethics board, so there are several guidelines in place. Your identity will be kept confidential; however, there is always the possibility of a security breach. I will do everything I can to prevent this from happening. If I ask you questions that do not make sense, just tell me so. I do not always ask the best questions! Feel free to skip questions or end the interview at any time.

The information will be used in a report for [HAO], and it could also be used in publications to help communication scholars learn about developing relationships with people who matter to their organizations. Throughout all reports and publications, your identity will be kept confidential.

With your permission, I would like to record our conversation with an audiotape, so I can accurately interpret it. I will destroy the tape on or before December 1, 2007. Only my advisor and I will have access to the tapes. Do you feel comfortable with my use of a tape recorder for our discussion? Do you have any questions before we start?

Questions
I would like to start by asking some general questions.

1. What affiliate have you participated in? *(Grand Tour)*

2. How long have you been involved with [HAO]? *(Grand Tour)*

3. How did you first hear about [HAO]? Word of mouth? Web site? *(Grand Tour)*
   It was important for me to quickly tag on these prompts (e.g., "word of mouth") because some people thought I was asking them about their first experience with the illness, which both the ethic's committee and I thought was unnecessary.

4. Why did you decide to join [HAO]? *(Grand Tour, Antecedents)*

5. What are your opinions of [HAO]? *(Grand Tour, Outcomes)*

6. Describe your involvement with [HAO]. *(Grand Tour, Stresses)*
    a. Follow-up if involvement decreased: Why has your involvement decreased?

7. What are your opinions of the local leaders? *(Grand Tour, Outcomes)*

8. What are your opinions of the state leaders? *(Grand Tour, Outcomes)*

9. What are your opinions of the national staff? *(Grand Tour, Outcomes)*

10. How would you characterize your experience with [HAO]? *(Grand Tour, Outcomes)*
    a. Follow-up: What do you think [HAO] does well?
    b. Follow-up: How do you think [HAO] could improve?

11. What does [HAO] mean to you? *(Grand Tour)*

12. Do you feel like you have a relationship with [HAO]? *(Strategies)*
    a. How has [HAO] built a relationship with you?
    b. What do you think of these strategies for building the relationship?

13. Has [HAO] ever gone beyond what you expected them to do to help you? Please explain. *(Relationship Type, Strategies)*
    a. Follow-up: Why do you believe they did this?
    b. Probe: Do you think they did this because they expected something in return?
    c. Probe: Do you think they did this because they genuinely care about you, regardless of what they think they are required to do to be a good organization?

14. Are there ways that [HAO] has let you down? Please explain. *(Outcomes)*
    a. Follow-up: Why do you believe this happened?

15. Do you feel that you have opportunities to share your ideas and feedback with [HAO]? *(Strategies)*
    a. What are these?

16. Do you read any publications or Internet information from [HAO]? *(Strategies, Outcomes)*
    a. What do you read?
    b. What do you think about [HAO]'s communication materials?

17. To what extent do you believe [HAO] considers your interests in their decisions and behaviors? Why? *(Control Mutuality, Strategies, Outcomes)*

18. To what extent do you feel that you have some control over what [HAO] does that affects you? *(Control Mutuality, Strategies, Outcomes)*

19. Would you describe any things that [HAO] has done to treat you fairly or unfairly? *(Trust, Strategies, Outcomes)*

20. Would you describe things that [HAO] has done to demonstrate that you can rely on them to keep their promises? *(Trust, Strategies, Outcomes)*

21. Are there things that [HAO] has done to undermine this trust? *(Trust, Outcomes)*

22. To what extent has [HAO] demonstrated to you that they can accomplish what they say they will do? *(Trust, Strategies, Outcomes)*
    a. Follow-up: Could you give me examples of why you feel this way?

23. Can you provide examples that demonstrate how [HAO] has shown you that they want to maintain a long-term commitment to a relationship with you? *(Commitment, Strategies, Outcomes)*
    Alternate wording due to this question not resonating easily: Do you think that [HAO] wants to be in a relationship with you for the long haul? Why?

24. Can you provide examples that have undermined this sense of commitment to a long-term relationship? *(Commitment, Outcomes)*

25. What would you miss about [HAO] if you stopped participating? *(Continuance Commitment, Strategies, Outcomes)*
    a. Follow-up: How important are these losses in your decision to continue participating?
    b. How has [HAO] delivered these benefits?
    c. Follow-up if this quality is important: Do you have suggestions for [HAO] for strengthening these areas?

26. Do you feel a sense of moral obligation to support [HAO]? *(Normative Commitment, Strategies, Outcomes)*
    a. Follow-up: How important is this sense in your decision to stay with [HAO]?
    b. Are there ways that [HAO] has emphasized a moral obligation to support them?
    c. Follow-up if this quality is important: Do you have suggestions for [HAO] for strengthening this sense of moral obligation?
    I later dropped this question based on hostile reactions I received from it. Most people thought this question trivialized their commitment to [HAO]. They asserted that it was much more than a moral obligation: It was personal.

People seemed to think this question suggested a major gap in understanding by my part.

27. Do you feel like you are emotionally bonded with [HAO]? *(Affective Commitment, Strategies, Outcomes)*
    a. Follow-up: How important is feeling an emotional bond with [HAO] in your decision to stay with [HAO]?
    b. Has [HAO] done things to increase a feeling of an emotional bond toward them?
    c. Has [HAO] done things to decrease a feeling of an emotional bond toward them?
    d. Follow-up if this quality is important: Do you have suggestions for [HAO] for strengthening the emotional bond between them and you?

28. How satisfied are you with the relationship that [HAO] has with you? Why? *(Satisfaction, Strategies, Outcomes)*

29. What are the first thoughts that come to mind when I ask you about your thoughts and feelings about staying in [HAO]? *(Outcomes)*
    a. Probe for stories to support answers.

30. Why have you decided to stay with [HAO] so far? *(Strategies, Outcomes)*
    a. Follow-up: You mentioned that you joined [HAO] because [reason]. How important is this reason to your decision to stay with [HAO]?

31. Is there anything you would like to add about ways that [HAO] can build a strong relationship with you? *(Strategies)*

32. Is there anything else you want [HAO] to know?

33. My dissertation committee will want to know about the diversity of people I interviewed. For example, I am a white woman in my 30s. Do you feel comfortable sharing your background with me?

34. Do you have any questions for me?

35. Finally, I am wondering if I may contact you at a later date to share the preliminary analysis for this study and invite your feedback. How would you prefer for me to contact you?

Conclusion
This has been so helpful. Thank you very much. I greatly appreciate your insights. Enjoy the rest of your day.

Appendix I: Former Member Protocol for Interviews

I placed italics and parentheses next to questions to relate the questions to the theoretical concepts. The questions that are labeled trust, control mutuality, commitment, and satisfaction were either taken directly from J. E. Grunig's (2002) protocol, or I closely adapted them.

Phone Introduction
Hi, is [name of person] there? Hi, this is Tiffany, the student who is conducting the [HAO] study. Is now still a good time to talk?

I would like to start by giving some background about this study. I am a Ph.D. student at the University of Maryland. I am earning my degree in communication. This study is my dissertation project, which is my last requirement for the degree.

I chose this organization because I believe in the work that [HAO] does. My study is focused on studying [HAO]'s relationships with their members. I am looking to identify what [HAO] is doing well and how they can improve.

I have an ethics board, so there are several guidelines in place. Your identity will be kept confidential; however, there is always the possibility of a security breach. I will do everything I can to prevent this from happening. If I ask you questions that do not make sense, just tell me so. I do not always ask the best questions! Feel free to skip questions or end the interview at any time.

The information will be used in a report for [HAO], and it could also be used in publications to help communication scholars learn about developing relationships with people who matter to their organizations. Throughout all reports and publications, your identity will be kept confidential.

With your permission, I would like to record our conversation with an audiotape, so I can accurately interpret it. I will destroy the tape on or before December 1, 2007. Only my advisor and I will have access to the tapes. Do you feel comfortable with my use of a tape recorder for our discussion? Do you have any questions before we start?

Questions
I would like to start by asking some general questions.

1. What affiliate did you participate in? *(Grand Tour)*

2. How long had you been involved with [HAO]? *(Grand Tour)*

3. How did you first hear about [HAO]? Word of mouth? Web site? *(Grand Tour)*
   It was important for me to quickly tag on these prompts (e.g., "word of mouth") because some people thought I was asking them about their first experience with the illness, which both the ethic's committee and I thought was unnecessary.

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4. Why did you decide to join [HAO]? *(Grand Tour, Antecedents)*

5. What are your opinions of [HAO]? *(Grand Tour, Outcomes)*

6. Describe your involvement with [HAO]. *(Grand Tour)*

7. What are your opinions of the local leaders? *(Grand Tour, Outcomes)*

8. What are your opinions of the state leaders? *(Grand Tour, Outcomes)*

9. What are your opinions of the national staff? *(Grand Tour, Outcomes)*

10. Were there ways that [HAO] let you down? Please explain. *(Outcomes)*
    a. Follow-up: Why do you believe this happened?

11. Why did you end your participation with [HAO]? *(Outcomes, Stresses)*

12. Did you show signs of your discontent or express your views in other ways to [HAO]? Why or why not? *(Outcomes)*

13. Did you read any publications or Internet information from [HAO]? *(Strategies, Outcomes)*
    a. What did you read?
    b. What do you think about [HAO]'s communication materials?

14. To what extent do you believe [HAO] considered your interests in their decisions and behaviors? Why? *(Control Mutuality, Strategies, Outcomes)*

15. To what extent do you feel that you had some control over what [HAO] did that affected you? *(Control Mutuality, Strategies, Outcomes)*

16. Would you describe any things that [HAO] did to treat you fairly or unfairly? *(Trust, Strategies, Outcomes)*

17. Would you describe things that [HAO] did to demonstrate that you could rely on them to keep their promises? *(Trust, Strategies, Outcomes)*

18. Are there things that [HAO] did to undermine this trust? *(Trust, Outcomes)*

19. To what extent did [HAO] demonstrate to you that they could accomplish what they said they would do? *(Trust, Strategies, Outcomes)*
    a. Follow-up: Could you give me examples of why you feel this way?

20. Can you provide examples that demonstrate how [HAO] showed you that they wanted to maintain a long-term commitment to a relationship with you? *(Commitment, Strategies, Outcomes)*

Alternate wording due to this question not resonating easily: Do you think that [HAO] wanted to be in a relationship with you for the long haul? Why?

21. Can you provide examples that undermined this sense of commitment to a long-term relationship? *(Commitment, Outcomes)*

22. Have you missed anything since you ended your participation in [HAO]? *(Continuance Commitment, Strategies, Outcomes)*
    a. Follow-up: How important were these losses in your decision to leave [HAO]?
    b. How had [HAO] delivered these benefits?
    c. Follow-up: Do you have suggestions for [HAO] for strengthening these areas?

23. Did you feel a sense of moral obligation to support [HAO]? *(Normative Commitment, Strategies, Outcomes)*
    a. Follow-up: How important was this sense in your decision to end your participation in [HAO]?
    b. Are there ways that [HAO] emphasized a moral obligation to support them?
    c. Follow-up if this quality is important: Do you have suggestions for [HAO] for strengthening this sense of moral obligation?
    I later dropped this question based on hostile reactions I received from it. Most people thought this question trivialized their commitment to [HAO]. They asserted that it was much more than a moral obligation: It was personal. People seemed to think this question suggested a major gap in understanding by my part.

24. Did you feel an emotional bond with [HAO]? *(Affective Commitment, Strategies, Outcomes)*
    a. Follow-up: How important was feeling an emotional bond with [HAO] in your decision to end your relationship with [HAO]?
    b. Did [HAO] do things to increase a feeling of an emotional bond toward them?
    c. Did [HAO] do things to decrease a feeling of an emotional bond toward them?
    d. Follow-up if this quality is important: Do you have suggestions for [HAO] for strengthening the emotional bond between them and their members?

25. How satisfied were you with the relationship that [HAO] had with you? Why? *(Satisfaction, Strategies, Outcomes)*

26. Is there anything you would like to add about ways that [HAO] can build strong relationships with their members? *(Strategies)*

27. Is there anything else you want [HAO] to know?

28. My dissertation committee will want to know about the diversity of people I interviewed. For example, I am a white woman in my 30s. Would you feel comfortable sharing your background with me?

29. Do you have any questions for me?

30. Finally, I am wondering if I may contact you at a later date to share the preliminary analysis for this study and invite your feedback. How would you prefer for me to contact you?

Conclusion
This has been so helpful. Thank you very much. I greatly appreciate your insights. Enjoy the rest of your day.

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