



**Through another pair of eyes:
Internal alignment for successful advocacy**

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Abstract

Advocacy roles in libraries are a combination of management, public relations and development functions. In many libraries, these functions and the relationships between them are not adequately understood. Advocacy roles in libraries can and should be undertaken by all. In many small libraries these tasks fall to the librarian while larger libraries are increasingly seeking specialists. Alignment among advocacy roles and functions results in cohesive, strong, and clear messages and priorities that can be used by all staff members to advocate library positions to important stakeholders including government, donors, and community groups. A suggested framework for determining levels of alignment is presented using business modes grounded by applicable examples.

Introduction

Advocacy is the pursuit of influencing outcomes — including public-policy and resource allocation decisions within political, economic, and social systems and institutions — that directly affect people's lives (Cohen, 2001). With changing funding models and priorities, advocacy is essential to the continued ability of libraries to fulfill their mission. Advocacy roles in libraries are a combination of management, public relations and development functions. In many libraries, these functions and the relationships between them are not adequately understood. Library staff is left feeling that advocacy is removed from their daily work and consequently they are unable or unwilling to undertake important advocacy roles.

Advocacy roles in libraries can and should be undertaken by all. Most library staff hold fundamental values in common; one of the most important being barrier-free access to information. This shared value is one of any library's strongest and many times most underutilized assets. Librarians understand library values, but are not generally taught or provided training in developing these into key messages. Adding these skills in the form of functional specialists leads to complications when roles are not clearly understood and the resources are not readily available. In many small libraries these tasks fall to the librarian while larger libraries are increasingly seeking specialists. Alignment among advocacy roles and functions results in cohesive, strong, and clear messages and priorities that can be used by all staff members to advocate library positions to important stakeholder groups including government, donors, and community groups.

In this paper, we make the case that internal alignment is necessary to effectively and efficiently discuss, communicate, and promote the library vision and provide a method to determine the level of alignment among different library functions. The identification of levels of internal alignment among the advocacy roles and functions will be explored through theories developed from the disciplines of management and public relations. Relationships among these functions should be developed for the benefit of the entire library, its users, and the wider community. Although creation of higher levels of internal alignment is beyond the scope of this paper, some ideas are presented for further development.

Advocacy Roles

Librarians share a professional background that includes an introduction to the values of librarianship such as intellectual freedom and inclusiveness. In addition, they learn a number of technical skills to organize information, provide access and empower users. As part of their education they may receive an introduction to the concepts of management, public relations and development, but these are not the focus of library training.

Libraries serve diverse communities with different requirements for service and resources. Public libraries are empowered to serve the entire community, with all of its component parts, and may divide their constituencies into target markets, with different programs designed for each group. Children's services, for example, are significantly different than those offered to seniors. Academic library services focus on the campus community, including faculty, researchers, staff and students, and may find that their communities are already divided into targets that represent natural groupings by discipline. The basis of all public relations, management, and development planning depends on librarians' understanding that users are motivated by a variety of needs and wants. The message of good library service is that users' lives will be improved by using the library, whether it is for recreation or to fulfill information needs.

In addition, all libraries are subject to the political directions of government, often their major funders. The most effective way to manage this reality is to develop the skills and tools needed to create positive and productive relationships with stakeholder groups. These groups, who have the power and resources to assist libraries, include private and corporate donors, targeted electoral groups, government departments and individual politicians.

It is imperative to advocate for the needs of the user by engaging the librarians' understanding of these needs and aligning that understanding with library management, development and communication activities to gain the resources needed from supporting stakeholders. The needs of each library's user groups dictate strategies for management, public relations and development. It is the supporting service role of librarians that, in effect, help implement and deliver successful strategies that support the overall strategic business plan for that library.

The Case for Internal Alignment

Management

The purpose of the library is generally defined in the mission statement and strategic documents. Mission statements have been identified as one tool that aligns the interests of a variety of stakeholders within organizations. Their virtues in defining an organization's philosophy and values are described in many basic management texts, and coincidentally support a healthy consulting industry. Mission statements also promote shared expectations among staff (Analoui & Karami, 2002), a component of successful organizations.

As employees have more decision-making authority in the workplace, the risks associated with greater job latitude and input into decision-making may be mitigated by increasing employee alignment with organizational goals and developing a shared perspective. Thus, the value of a mission statement is only realized if it is used as a constant guide for all functions within the library. A survey of the impact of mission statements shows that the influence of the mission statement is significantly greater when organizational elements are aligned with it continuously (Bart, 1997).

Research shows that mission statements are most powerful when there is widespread inclusion of different stakeholders in the process of developing or revising them. A survey investigating the participation of different stakeholders in the mission statement development process found that non-managers were found to have participated only about one quarter of them; generally only senior managers involved (Bart & Tabone, 2000). Staff from the development and public relations functions may be forgotten during these processes if the focus is too narrowly defined on library services, and those functions are not seen as being an integral part of how those services are delivered. Management, then, has a responsibility for starting the process of internal alignment by recognizing and articulating the role that these functions play in a successful future for the library. Inclusion of development and public relations functions in the planning process is essential for more effective delivery and implementation of the Library's Strategic Plan.

After the mission is articulated, the normal process is to begin the development of specific goals. Again, the development and public relations functions must be integrated into the goals to ensure that as work begins towards those goals, there is a solid basis for internal alignment. Each goal should have a development component and a public relations component. This is another area where management will take the lead in developing an aligned environment, by ensuring that no goals are accepted without consideration of those components, rather than adding them to an already completed plan.

As the planning process becomes increasingly specific and reaches further down into the organization, this alignment must be preserved. This means that all processes must demonstrate good integration. Some organizations demonstrate good integration, with processes and plans carefully integrated, but the norm seems to be partial success. One study found that managers did not generally work aggressively towards integration, and suggested that this was due to a political climate that did not reward this behaviour (Bart & Tabone, 1998). To put this in more practical terms, if individuals are not rewarded for meshing their work with that of the development and public relations functions, it is not likely to happen consistently.

The assignment of specific roles and responsibilities to service, development, and public relations functions will contribute to the achievement of the library's goals. Role clarity is an essential component of turning strategy into operations and answering the fundamental questions about who is responsible for doing what (Posner & Butterfield, 1978). Role clarity for different functions in the library paves the way for the establishment of individual deliverables that will feed into the departments' commitments. It provides a structure to support changed behaviour.

One of the purposes of role clarity is to coalesce individual work around department goals, which are focused on the library's goals. By articulating the deliverables for each goal, it encourages integration of work from various areas of the library, including development and public relations. It becomes transparent for all participants how their linked activities will contribute to the library's overall strategy. When roles are clarified, and staff members begin working together towards shared goals, there is an increased opportunity for all organization members to begin to understand the contributions of librarianship, management, development and public relations. When everyone is working in the same direction, there are increased opportunities for shared information, candour and openness. If the organization has failed to make clear that the development and public relations functions are an integral part of the organization's strategies, it is unlikely that other employees will understand their obligations of both time and allocated resources needed to successfully fulfill those functions, or even for that alignment to occur.

At a practical level, this means that the expectation that the library operations functions will work closely with the development and public relations functions, and needs to be expressed clearly. This may require inclusion in position descriptions or individual expectations, and assessed as part of the performance appraisal process. This requires, however, that the managers can be clear with staff about what, for example, each person's expectation is with regard to advocacy and fundraising. The goal is to develop an organizational culture that enables teamwork and focuses on individual contribution to established realistic goals.

One of the clearly observable indicators that the organization values the interaction of all staff functions is the provision of necessary training. Training that is focused on the desired behaviour sends a clear message about what is expected. This is particularly true when changing the way work is done, and more specifically, when your library raises the expectation that all library operations staff will participate in development and public relations support activities. Employees need access to the knowledge and information that are integral to their success, and thus, the successful achievement of the mission of the library. This needs to be combined with a reward and recognition

system that recognizes success and celebrates excellence in the achievements of these interactions.

Rewards and recognitions significantly enhance an environment where employees work together to accomplish goals, in this case, the integration of library operations, development and public relations. Recognition is generally considered to be reinforcing the desired behaviour, while rewards are focused on achieving the desired results. In order to support the integration of these functions within the library, it is important to reinforce collaboration as a means to successful goal achievement, rather than focusing solely on goal achievement as it pertains or is derived by completing individual tasks.

Public Relations

Public relations is essentially the strategic management of internal and external organizational relationships through communication (Hunt & Grunig, 1994). These relationships can be identified by asking the question: "What groups have the ability to affect the functioning of my organization?" The answer to this may range from library management, to book vendors, to government entities (Cutlip, Center, & Broom, 2000). When the number of relationships that need to be managed is few, public relations activities are simple and easily identified. However increasingly few organizations are able to maintain that type of environment and libraries are no exception. With the developments in technology and information, fundamental expectations regarding the role of libraries in our society are being reevaluated. On an individual level, this is causing changes in the traditional role of librarians. With change comes the need for increased communication to ensure that changes are recognized, understood, and adapted to in a way that benefits the entire organization and increasingly, as libraries become more interdependent, the entire global community.

To effectively manage relationships with groups that can influence an organization (also known as stakeholders or publics), the role of a public relations practitioner is to, through communication, align key aspects of an organization's goals, mission and/or vision with those of its priority stakeholder groups in order to positively influence outcomes. The practitioner accomplishes this through five main activities; environmental scanning, boundary spanning, strategic communication planning, plan implementation, and evaluation.

Environmental scanning is a process of gathering, analyzing, and disseminating information for tactical or strategic purposes. Information gathered is both factual and subjective sourced from the environments that the organization is operating in. For example, a library may gather information from local media, professional journals, conference presentations, political speeches, and coffee break conversations. This information is then analyzed for relevance to an organization's goals. If relevant, the information can then be disseminated to the appropriate personnel for strategic planning.

Environmental scanning is undertaken by everyone on a personal level. By understanding this function and the goals of an organization, everyone in an organization can contribute this effort. Scanning can take place on an ad-hoc basis, through periodic scanning such as quarterly, or through continuous scanning. The type engaged in may depend on resources; however, success can be achieved by spreading this responsibility throughout the organization and creating opportunities for information

to be submitted. The information gathered allows an organization to act quickly to take advantage of opportunities or recognize potential issues.

Closely related to environment scanning is boundary spanning. Boundary spanners are individuals who frequently interact with an organization's internal and external environments. Boundary spanners are important as they are able to relay information directly from the environment in which it's occurring. This is essential during rapid change as decision makers grapple with which information to pay attention to and which to ignore. In addition, boundary spanners are best able to act as advocates for the organization. Public relations practitioners are ideally suited to this role as they align priorities and implement strategies for communicating with an organization's stakeholders. This role is also undertaken by other organizational roles including management and development. Librarians and all library staff act as boundary spanners as well through daily interaction with their users, through professional development opportunities, or through collaborative projects with outside organizations. Dissemination of information gathered by boundary spanners throughout the organization is once again important to provide the best information by which to make decisions and optimize opportunities.

Public relations planning is process of analyzing the information gathered using the above techniques and translating it into specific communication goals and tactics designed to improve the organization's position. It is in this area that a practitioner's skills and training come into play to determine the most appropriate methods for analysis and the most effective tactics to employ in communicating an organization's key messages. The most powerful messages are those that reflect internal alignment. It is these messages that will be repeated and remembered. Incorporating feedback and evaluation methods into the planning cycle is essential in order to make adjustments as needed in a changing environment. This allows for continual attunement to an organization's alignment.

Development

Development is the integrated, strategic approach in which the vision and mission of an organization is enhanced through the contributions made by its donor base. Fundraising is the act of successfully soliciting those funds from individuals, corporations, government agencies and foundations to support an initiative (Flanagan, 1999). Development, as it relates to library fundraising, is somewhat unique in both its approach and its constituencies.

Successful library development is based on creating and maintaining relationships with each of the stakeholder groups that are affected or interested in the mission of the library (Burk, 2003). In this context, the development function acts a liaison between the library management and its donors.

When involved in the strategic planning exercises as led by management, development leaders have a more grounded approach in future fundraising efforts. As mentioned previously in this paper, involvement and buy in at all levels is key. To insure success, and much like the communications function, development will create specific strategic plans for each of the areas of interest within the overall Library Strategic Plan. Development and donors should not drive this process.

Each development plan is based on an environmental scan as it relates to a specific project and its deliverables. The plan provides a detailed analysis of the current environment, and takes into account the library staff involved, their roles, the associated timeframe for each step of the process, and the likelihood of completion. From a donor perspective, it lists all donors that might be interested in the project and capable of making a sizable contribution. These are ranked based on the linkage to the library, ability to give, the amount of the donation, and interest in the project.

Complete support throughout every stage of the process and level in the library is crucial for complete success. Staff at multiple levels is included in specific parts of the development cycle, from identification of potential donors and tactics of engagement, to cultivation and relationship building, to solicitation of the donation, and then stewarding the donor for their contribution.

The communications function is critical in this process, and helps publicize the results to both the internal and wider communities, and thus advocates on behalf of the donor and the library on the success of a particular project that funds have been raised for. Donor recognition varies from public announcements and media coverage to small, tasteful letters or plaques. Proper stewardship and recognition of a donor's contribution establishes a stronger connection to the organization, and thus, can lead to future donations from those past and other new donors.

Identifying Internal Alignment

Internal alignment of library services and management with public relations and development functions has tangible benefits for the library. Good communication increases job satisfaction and improves customer service, which brings people into the library, either physically or virtually, allowing for the development of personal relationships, which in turn yields understanding and goodwill supportive of the library. While this sounds like a very straightforward and logical approach, there are many barriers to internal alignment, and it is often difficult to assess the degree of alignment within the library. Here, the identification of levels of internal alignment among the advocacy roles and functions will be explored and a conceptual methodology suggested. We believe this method could also be applied to alignment between different groups.

Agenda Setting

The word agenda comes from a Latin term for "things [needing] to be done". We all have an agenda, a prioritized list of what needs to be done, whether it's a shopping list or planning your work schedule. A well-known and tested public relations theory known as "agenda setting" explains a correlation between the rate at which media cover a story and the extent to which the public think the story is important. In effect, they found that the media agenda was very similar to the public agenda.

The theory was introduced in 1972 by Maxwell McCombs and Donald Shaw in their ground breaking study of the role of the media in 1968 presidential campaign in Chapel Hill, North Carolina. Since its inception, this theory has been tested over 350 times in the literature. Subsequent studies have indicated a cause and effect link where the media was shown to influence the public agenda. Most research on agenda-setting is

based on the assumptions that the media do not reflect reality, they help shape public priorities, and that this is achieved through media concentration on a few issues and subjects leading the public to perceive those issues as more important than other issues. In the public sphere, there are four main, interrelated agendas:

- Media agenda: Consists of the issues and stories discussed in the media.
- Public agenda: Consists of issues discussed and personally relevant to members of the public.
- Policy agenda: Consists of issues that the government and policy makers consider important
- Organizational agenda: Consists of issues that corporations, institutions and other organizations consider important.

We know that the library agenda will be part of the public organizational agenda. In order to get noticed by the media agenda and made relevant to the public agenda and policy agenda, the library messages must be loud and clear. We also know that each of the above agendas are created from of sub-level agendas. If we extrapolate what has been learned through agenda setting, we can use this theory to create an organizational agenda that can serve as a basis for advocacy activities. This is important, for in order to determine the levels of internal alignment, one must first know what needs to be aligned. Our suggestion is to begin the creation of an organizational agenda by examining the vision, mission statement and articulated goals of an organization. From this, create a prioritized list of “things needing to be done” or an agenda.

Coorientation Theory

Now that we have an organizational agenda based on what the organization says about itself, how do we measure internal alignment? In other words, how strongly do the library advocacy roles agree with the organizational agenda? In order to test this, we can look to another public relations theory for guidance.

Coorientation theory began as a method in psychology used to measure the mutual orientation of two individuals to an object in the early 1950s. The theory has since been expanded and adapted to the disciplines of business and public relations to determine levels of agreement and accuracy on issues important to an organization and its publics. The strength of this theory is that it takes into account the actual perceptions a group or individual has about an issue, as well as what each group or individual perceives are the views held by others. These perceptions can help us measure alignment between the advocacy roles in an organization using the organizational agenda as the “issue”.

If we focus on alignment of library management and library staff, the coorientation model would be viewed as below:

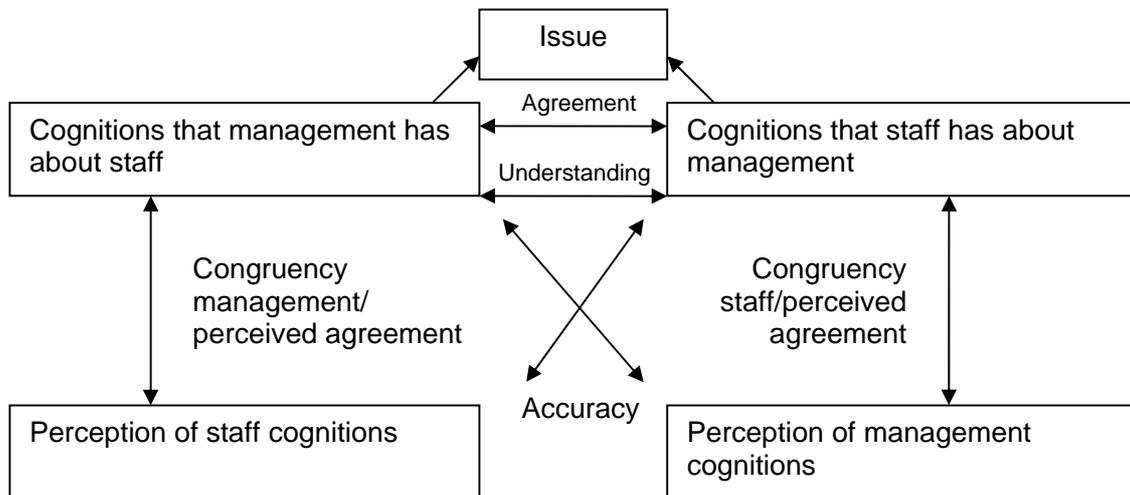


Figure 1. Coorientation model showing comparison of library management and staff cognitions. Source: adapted according to Cutlip et al. (1999).

This model can be used to measure the following four key variables (Connelly & Knuth, 2002):

- *Congruency* – the degree to which management and staff believes that their perception of an issue is similar to the other's perception. This variable is also called *perceived agreement*.
- *Accuracy* – the degree to which the perceptions of either group approximate the real ideas or cognitions the other. The degree to which the approximations of one side match the real attitudes of the other.
- *Agreement* – the degree to which two (or more) sides share similar perceptions.
- *Understanding* – the degree of similarity between definitions given by two or more parties.

Increase of agreement and increase of accuracy represent the key objectives of communication programs.

	Perception that management/staff agree	Perception that management/staff disagree
Management/staff agree	Monolithic consensus	Pluralistic ignorance
Management/staff disagree	False consensus	Disagreement

Table 1: Source: adapted according to Cutlip et al. (1999).

Measurement of these variables can be accomplished through the development of a questionnaire containing statements related to the organizational agenda developed above. Respondents estimate their agreement using Likert-type scales. Then estimate the level of agreement the other side felt about each statement. Measurement is based on how statistically similar or dissimilar questions are. In order to quantify the variable, one needs to calculate the *difference* that conveys the gap between the cognitions of either side: the smaller the difference, the greater the level of alignment.

Analysis

Below we are suggesting a diagnostic tool that provides a framework for evaluation, with suggestions for improvement using the data gathered via the coorientation model. The model is based on the interaction between a focus on the organization's mission and goals, and the level of interaction between the operations, development and public relations functions.

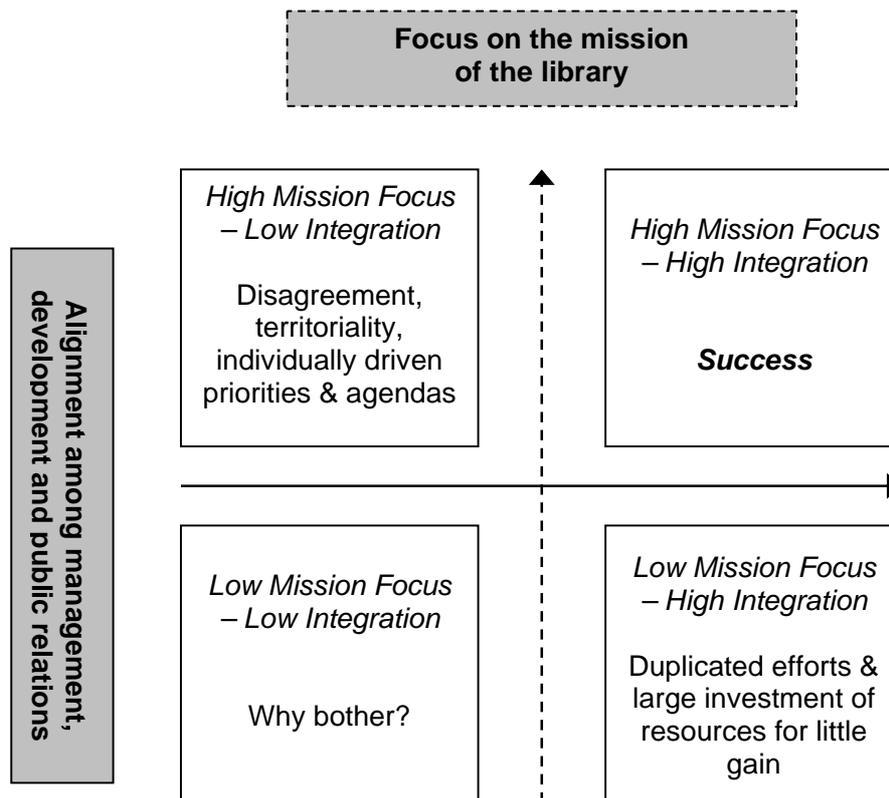


Figure 2. The effectiveness in achieving the mission of the library as it relates to the level of interaction and alignment between the management, development and public relations functions.

High Mission Focus – High Integration: Indicated by Monolithic Consensus

In an organization with a high level of focus on the mission and goals, combined with a high level of integration of the various functions within the library, the success is evident. Staff members work together for the overall good of the library, with tension and conflict at a minimum. The success of any one department is celebrated by all. Problems are quickly resolved through open sharing of ideas. If your library is in this quadrant, your only concern is to continue to monitor it for ongoing success.

In this example, all staff has participated in the library's strategic planning process. Key areas of interest have been determined and stakeholder groups identified. Management, communications and development functions have coordinated detailed plans for each area of focus within the Strategic Plan and a consistent message has been disseminated throughout the library and to its stakeholders. Those appropriate staff and supporters have been identified and work towards setting the fundraising target based on realistic goals is set. Potential donors are identified, cultivated, and solicited. The goal is achieved, the

donor is stewarded, and the staff members associated with the process are recognized. Throughout the process, and as milestones are achieved, they are communicated to the library and broader communities, and the impact of the donations and the project are being shared.

Success strategies to focus on in this quadrant are media relations and community outreach. The organization has a strong, agreed upon agenda that can be used to influence the media, public, and policy agendas.

High Mission Focus – Low Integration: Indicated by Pluralistic Ignorance

This may be the most frustrating of the quadrants in which to find your library. People are typically very focused and believe that their work is directly tied to the achievement of organizational goals. They just can't understand why everyone else is getting in their way and why they are not being recognized by their hard work. Although staff members are very committed, there is a high level of disagreement and distrust. Work is closely guarded and territoriality rather than teamwork best describes the organization. If your library is in this quadrant, you have excellent resources in your focused staff; your task is to support alignment. This is accomplished by setting clear expectations and rewarding the behaviour that you expect. A cultural shift from individual accomplishment to team accomplishment will be an essential component of the change.

In this particular case, the library has a strong mission, but team participation in achieving that is low. And because there is little alignment, everyone has their own interpretation, and thus agenda.

In a larger library system where there are multiple disciplines of study, a lack of communication can often occur. At times, the individual units will drive their own agenda as they interpret it as part of the larger plan. Instead of working on a coordinated approach when talking to donors, there is a sense of self priority and ownership. A lack of communication between staff continues to occur, and a donor will be approached by multiple individuals to support their project within the library, rather than taking a coordinated, professional and tactical approach. This often leads to the donor getting frustrated and can lead to a loss of confidence in the library and/or its staff.

Success strategies to focus on in this quadrant include internal communication designed to highlight areas of agenda agreement. This can be accomplished through organizational newsletters, meetings, skills training. It is also beneficial that all donor contacts are logged in the form of a contact report, which would be coordinated by the development staff.

Low Mission Focus – High Integration: Indicated by False Consensus

If you find your library in this quadrant, everyone gets along well, and team activity is the norm. The problem is that it's not really teamwork because it isn't focused on the accomplishment of the library's goals. It is not taking advantage of one of the library's greatest resources, the abilities and skills of the people who work there. Senior management needs to establish that they have a clear idea of what needs to be accomplished and why, and then determine how to perpetuate this throughout the organization. One way forward is to return to the planning process and ensure that there is understanding and consensus around the mission and goals of the organization. This

can be followed by a review of personnel practices to ensure that expectations, appraisals and rewards include the articulation of work towards the library's goals.

In this example, staff concentration on creating and completing tasks as they see fit with little to no coordination amongst themselves or other departments. Little to no advocacy is taking place at any level, and the library has lost touch with the greater purpose they fulfill. Donors and staff intermix, and donor events are held purely as a social function and not having any particular goal, meaning or measurable gain.

Success strategies for this quadrant would include communication programs designed to emphasize and explain a library organization's agenda items. As above, this can be accomplished through internal communication strategies such as newsletters, meetings, and training.

Low Mission Focus – Low Integration: Indicated by Disagreement

If you find your library in this quadrant you have a significant task ahead of you. It is often characterized by dispirited staff members who appear to not know how their work contributes to the organization. Conflict is common and unresolved. Staff turnover is high. A library in this quadrant needs to consider all of its practices and how they are related to the library's purpose. In particular, a review of internal communications may be helpful. If the library has a clear purpose, are staff members aware of it? It is necessary to ensure that everyone understands the purpose and how their work relates to it.

When this occurs, donors are often left out of the equation completely. Donors that do approach and wish to get involved are marginalized largely due to poor staff moral and an unclear mission. As advocates of the library, this negative experience is often shared with the broader community, and support to the library suffers.

Success strategies for this quadrant would involve a reevaluation of the organizational agenda. Internal communication efforts can assist this process by creating a level of transparency designed to promote trust and collaboration.

Conclusion

In this paper we have attempted to delineate the roles played by organizational advocates, make a case that alignment between organizational advocates is necessary to success, and provide a suggested method to determine levels of alignment. While this framework may apply to your entire library organization, it may also apply only to some departments or to some projects. In this case, your efforts to correct it can begin with a focus in that area. Caution must be exercised, however, to ensure that this particular department or project is not a symptom of a larger organizational problem. Although used anecdotally by the authors, this method has not been empirically tested and plans are underway to design a research project using this approach.

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