

September, 2016

CHANGING TO STAY THE SAME:
THE PARADOX OF PLACE-BASED ENTERPRISE ON FOGO ISLAND

Submitted by

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A Thesis to be submitted to the

School of Graduate Studies

In partial fulfillment of the requirement for the degree of

Masters of Science

General Management, Faculty of Business Administration

Memorial University of Newfoundland

October, 2016

St. John's

Newfoundland

Acknowledgement

Thank you first and foremost to my supervisor, Dr. Natalie Slawinski (finally a place for ‘poetic’ language). The past two-years working under your guidance have been an absolute gift. Thank you for your confidence, your compassion, your insight, and your friendship. Thank you for taking a chance on me, for investing in me, for providing me with the confidence, exposure and opportunity to explore my passion and my potential. Thank you for your endless patience and unwavering commitment to my learning. You set the bar high, but you pushed gently, and you made this MSc experience particularly wonderful.

Thank you to my reviewers, Dr. Gordon Cooke and Dr. Tom Cooper, for your careful critiques and positive feedback. To Dr. Cooper, also, for encouraging me to pursue the MSc program. Sarah Murphy, thank you for being my classmate, my confidant, and my spirited cheerleader. To my parents, thank you for your company, delicious nourishment, and unwavering faith in my success. Thank you to my partner Chris. Thank you for loving me, supporting me, and joining me on this lifelong journey of endless curiosity and learning. Finally, thanks to my sweet dog, Pekoe, for your quiet companionship and contagious joy while exploring the trails and coastline of Fogo Island.

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INTRODUCTION

Following a twentieth-century wrought with international wars, an escalating climate crisis, and mounting poverty, the turn of the twenty-first century brought demands for a better approach to sustainability across the globe. Organizations are a powerful force for change (Kurucz, et. al., 2013). Despite their role in the degradation of social and environmental conditions to date, organizations make up fifty-one of today's one hundred largest global economies (Anderson & Cavanagh, 2000), and thus, must be engaged in – if not lead the way for – sustainability action now and into the future.

Beginning in the 1990s, researchers across such academic fields as geography (Relph, 2009), social sciences (Gustafson, 2001), and organizational management (Guthey, et. al., 2014; Shrivastava and Kennelly, 2013; Elmes, et. al., 2012; Higgins-Desbiolles, 2011; Kerstetter and Bricker, 2009; and Thomas and Cross, 2007) began to recognize an important tie between 'place' and business in sustainability initiatives. As Shrivastava and Kennelly note, "Sustainability can be better understood by examining its rootedness in place", for place "represents the coalface, the grounded intersection of business activities, nature and society" (2013, p. 86). Historically, the concept of 'place' has been the particular domain of geographers, varying in definition, but discussed mainly in terms of region (Guthey et. al., 2014). More recently, scholars of social science, environmental science, and organization management have taken an interest in place and have begun to grapple with broader definitions. In 2007, management scholar, David F. Thomas, and sociology scholar, Jennifer E. Cross, combined the works of geographer, Robert Sack (1997), and sociologist, Per Gustafson (2001), to develop a definition of place that separates the concept into four realms: 'the natural environment', 'the social environment', 'the material environment',

and ‘meaning’. Thomas and Cross’ (2007) delineation of the material environment (including built structures and the economy) and their distinction of the material environment from the social realm, lend this definition of place particularly well to today’s organizational context.

Traditionally, in organizational literature, place has been “typically considered the backdrop for organizational practices, treated in reductionist ways, or simply ignored” (Thomas & Cross, 2007, p. 33). In 2013, management researchers Shrivastava and Kennelly explore the concept of ‘place-based enterprises’ (PBEs), an organizational form they define through three qualities, “those enterprises with a local or place-based locus of ownership and control, embeddedness or rootedness in the physical, social and human capital of a place, [and] possessing a sense of place and a social mission” (p. 90). While PBEs were not a new business form, they were new to the organizational literature, and according to Shrivastava and Kennelly (2013), PBEs hold the potential to redefine the relationship between social, environmental and economic success, leading the twenty-first century society into a new understanding and implementation of sustainability. As they explain, “PBEs deeply, intricately, and intimately connected with and rooted in places, may represent key components of locally sustainable economies” as they are “more likely than other enterprises to engage in socially and environmentally sustainable performance” (Shrivastava & Kennelly, 2013, p. 94). Thus, expanding research on PBEs holds promise for pushing the field of organizational sustainability forward.

Organizational scholars Wendy Smith and Marianne Lewis emphasize that the effective, intimate understanding of all organizations depends on insights into the tensions they face. They write, “As environments become more fast paced and competitive, individual leaders’ responses to these tensions are a fundamental determinant of an organization’s fate” (Smith & Lewis, 2014,

p. 23). In their 2012 place-based work, Elmes et. al. highlight that places, too, “are full of internal conflicts” (Elmes et. al., 2012, p. 538), which, like organizational tensions, can be explored and managed to enhance long-term sustainability efforts. While existing literatures have explored both organizational and place-based tensions, as well as those in such related fields as eco-tourism and social enterprise, the tensions facing PBEs remain unexplored. The goal of this research is to determine what are the tensions facing PBEs and how do they manifest?

To address this research question, an in-depth case study was developed around the Shorefast Foundation, a small PBE founded in 2003, dedicated to the economic and social resilience of the rural Newfoundland community of Fogo Island. Through semi-structured qualitative interviews, field observations, and archival document review, this study revealed six tensions specific to place-based enterprises, which I label PBE tensions and define as inconsistencies and/or challenges that arise when PBEs simultaneously incorporate one or more place-based elements to balance rootedness in place and sustainability orientation throughout their day-to-day operations.

The six PBE tensions were found to arise as a result of the Shorefast’s simultaneous place-based rootedness and sustainability orientation are: economic capital versus sacred capital, commercial tourism industry culture versus fishing-based employment culture, the appeal of remoteness versus the inconvenience of isolation, organizational success versus business community success, operational investment versus cultural asset investment, and non-local hiring versus local hiring. Further, the analysis of these tensions revealed an overarching paradoxical relationship between renewal of place and preservation of place which contributes to both the sustainability and PBE literatures.

This study consists of six sections. In the Literature Review I provide an overview and discussion of the prevalent tensions in four literatures related to the PBE concept: place, sustainability, ecotourism, and social enterprise. Tension-based insights from each field are explored to provide a richer context for the study of PBE-based tensions. Next, the paradox literature is introduced providing the theory and framework by which PBE tensions may be analyzed. The Research Context provides an overview of the Shorefast Foundation, its local ownership, and the place-rootedness and sustainability orientation of its mission and operations as a PBE. The Methods section follows with a detailed account of the research location, data sources and analysis. The Findings of this study provide an in-depth description of the six PBE tensions faced by Shorefast and how they manifest and the Analysis section identifies the renewal-preservation tension within all six PBE tensions and explores its paradoxical nature. Finally, in the Discussion & Conclusion, I synthesize the findings outlined throughout my study, providing a discussion of the contribution to the PBE and sustainability literatures, highlight the practical opportunities presented to the broader business community, and outline the limitations of this study.

LITERATURE REVIEW

Place-Based Enterprise

'Place' has long been a common sense, everyday term. According to researchers, although "we already think we know what it means" (Elmes, et. al, 2012, p. 537), "no-one quite knows what they are talking about when they are talking about place" (Cresswell, 2004, p. 1). Even up until the early 2000s, place was considered the realm of geographers, "simply considered a location, a point on a map, or a short-term residence" to those outside the geography field (Guthey, et. al. 2014, p. 256). In 2000, for example, sociologist Thomas Gieryn conducted a review demonstrating the persistent disconnect between place and the field of sociology at that time. He notes, "Sociological studies sensitive to the issue of place are rarely labeled thus, and at the same time there are far too many of them to fit in this review" (p. 463). He goes on to suggest that the labelling of work as a 'sociology of place' at that time would run the risk of "ghettoize the subject as something of interest only to geographers, architects, or environmental historians" (p. 463).

Beginning in the mid-late 1990s, however, early connections between place, organizations, and sustainability began to emerge within the academic literature. In 1996, organizational scholar, Christa Walck, proposed re-imagining organizations and their ecological impact by introducing the 'metaphor of place' to the corporate environment. She describes place through five themes: transcendence, locality, community, beauty, and morality, and uses the metaphor of 'organizations as places' to promote a change in the way organizations function; "not simply to make organizations more ecologically sound in the existing scheme of things, but to radically recreate organizations so that ecology is possible" (p. 27). While Walick's work

engages place only as a literary device, it taps into the same rationale that would gain cross-disciplinary momentum over the following decade. She writes:

Whereas the contemporary literature of organizational transformation invokes these themes to create organizations which think globally, intent on mining the world for a competitive edge, the metaphor of place will reorganize, refocus, and re-envisage these themes to create organizations which think locally, determined to develop a sustaining sense of place (p. 27).

Another early voice on the link between place and sustainable business was Whiteman and Cooper who, in 2000, explored the impact of ecological embeddedness among organizational managers. The study measured the concept of ecological embeddedness according to four metrics: strong personal identification with local ecosystems, adherence to ecological beliefs of respect, reciprocity, and caretaking, the experimental gathering of ecological information, and physical location in an ecosystem. The study determined a clear, reinforcing relationship between the four place-based indicators and a manager's commitment to sustainable practices.

Over the next decade, the topic of place-based organizations gained momentum both in and outside of the organizational management field. In their 2003 article, political scientists Imbroscio and colleagues, presented six organizational models based on place-based ownership arguing, "with ownership and control held in a more collective or community-oriented fashion, such enterprises tend to anchor or root investment more securely in communities, providing a counterforce to globalization" (p. 31). The six models consisted of: 1) community-owned corporations, corporations in which community members and/or individuals strongly tied to the community are the primary owners and control all voting shares of stock; 2) nonprofit corporations, organizations founded to serve a non-financial purpose, often locally oriented and created to meet local needs; 3) municipal enterprise, organizations formed by local governments to place-specific economic development; 4) consumer cooperatives, "self-help economic

structures that provide quality goods and services to their members at a reasonable cost” (Imbroscio et. al., 2003, p. 41); 5) employee ownership, described as taking two forms worker cooperatives and employee stock ownership; and 6) community development corporations, “nonprofit organizations dedicated to bringing about the community economic stabilization of a clearly defined geographic area” (Imbroscio et. al., 2003, p. 46).

In 2006, management scholars Peredo and Chrisman developed the concept of community-based enterprise (CBE), as a strategy for sustainable local development to combat international poverty. Described as an emerging form of entrepreneurship rooted in community culture, natural and social capital, the researchers define CBE as “a community acting corporately as both entrepreneur and enterprise in pursuit of the common good” (p. 310), with social, cultural, environmental, political, and traditional initiatives at its core.

The following year management and sociology scholars, Thomas and Cross (2007), made the case for organizations as place builders, grouping them according to two agent perspectives: those organizations who understand their successes to be *independent* of place and those who see corporate success as *interdependent* with the place in which it is located and conducts business. Within the agent perspectives, the researchers identify four *place agent identities* deemed to reveal “how organizations conceptualize themselves as social actors – agents – in relation to the places in which they are located and do business” (p. 41): transformational (change agents), contributive (investors, contributors), contingent (participants), and exploitative (independent agents, industry-centric).

By 2013, organizational researchers, Shrivastava and Kennelly, introduced the concept of ‘place-based enterprise’ (PBE). Although PBEs have long existed, Shrivastava and Kennelly’s work focuses on defining, labelling and exploring the qualities of PBEs as a distinct

organizational form within the business literature. According to the researchers, PBEs possess a strong sustainability mission and purposeful anchoring in the preservation of place. The concept is based on the researchers' Typology of Organizations in Place upon which organizations are defined in quadrants along a two-dimensional axis. The first dimension is 'organizational rootedness in place', the degree to which firms are "dependent on place and see their own fortunes as linked with the health and welfare of a particular place" (Shrivastava & Kennelly, 2013, p. 90). The second dimension, 'sustainability orientation', is the extent to which organizations seek to "balance the well-being of place (in all of its physical and social manifestations) with their economic success" (Shrivastava & Kennelly, 2013, p. 90). Shrivastava and Kennelly's Typology of Organizations in Place is included in Figure 1.

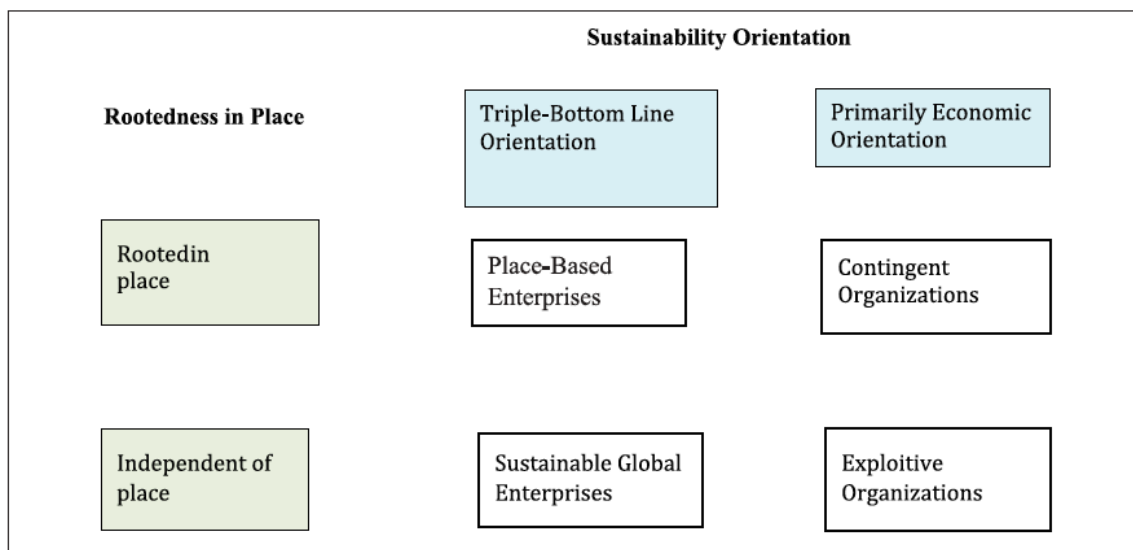


Figure 1: Typology of Organizations in Place (Shrivastava & Kennelly, 2013, p. 91)

According to this typology, the researchers define four place-based organizational categories: contingent organizations, sustainable global enterprises, exploitative organizations, and place-based enterprises (PBEs). Contingent organizations are rooted in place only to the extent that they need specific place-based resources to sustain economic performance, but completely lack a

sustainability orientation. Sustainable global enterprises, while not place-based, are described as ‘place sensitive’: “while possessing global mobility and able to arbitrage opportunities on a vast scale, [sustainable global enterprises] also recognize the importance of ‘indigenizing’ and cocreating social and economic value in all the locations in which they operate” (Shrivastava & Kennelly, 2013, p. 91). The third organizational category, exploitative enterprises, are described as, “neither rooted in place nor possess a sustainability orientation. Their goal is, as the name implies, to exploit the resources of place to further their economic goals” (Shrivastava & Kennelly, 2013, p. 91). According to Shrivastava and Kennelly’s typology, PBEs represent the most rooted and sustainability-orientated of all organizations:

PBEs are firmly rooted in and interdependent with place and practice an ethos of sustainability. They possess a distinctive sense of place and social mission; the well-being of place is an important organizational goal, both intrinsically and for its own instrumental value in fostering organizational success” (p. 91).

Cohen and Munoz (2015) expand PBE theory through the development of a middle-range theory of purpose-driven entrepreneurship in urban settings. Drawing inspiration from Shrivastava and Kennelly’s 2013 work, the researchers perceived that purpose-driven urban entrepreneurs are driven to establish fields of care for their neighbors and fellow citizens as a result of social and territorial system embeddedness. The field of care was also alleged to influence the subjects’ venturing process (Cohen and Munoz, 2015). Given the newness of PBEs to the organizational literature, however, detailed insights remain limited. One key to harnessing the sustainability potential of PBEs is uncovering the challenges they face. The goal of this literature review is to explore how place-based tensions have been examined in other literatures and what gaps exist.

To gain a deeper understanding of the organizational tensions faced by PBEs, the following sections provide an overview of the two fields that most closely inform Shrivastava and Kennelly's PBE dimensions. The first field is the 'place' literature, informing the PBE 'place rootedness'. The second field, 'sustainability', pertains to the 'sustainability orientation' of PBEs. In the following review, each field is discussed in an effort to highlight the tensions already known to those literatures which may impact the operation and success of a PBE.

Place

The first dimension of a PBE is a deep rootedness in place. PBEs are deeply embedded in place; mindful of both their complex tangible links to natural, human, social and financial capital, as well as the intangible connection to place-based identity. PBEs are a distinct organizational form in that they are guided by a particular sense of responsibility to place (Shrivastava & Kennelly, 2013). Thus the definitional development of 'place' and its evolution into the organizational literature provide a deeper understanding of the complexities and implications of PBE place-based rootedness.

Traditionally, throughout the literature, "there has been very little considered understanding of what the word 'place' means", notes Cresswell (2004). Place has been commonly utilized as "a word that seems to speak for itself" (Cresswell, 2004, p. 1), yet by definition, remains unclear (Relph, 2009). In the 1970s, humanistic geographers began to explore the human element of place as a cultural location, and "place became a concept through which scholars could conceptualize the relative position of people within webs of social, cultural, economic, and similar relationships" (Guthey, et. al. 2014. P. 256). In 1976 geography scholar

Edward Relph divided place into three elements: physical setting, activities, and meaning suggesting that meaning is the most complex but also the most important of the three (Relph, 1976). About the same time, scholars outside the geography field began to look closer at the concept of place. Psychologist David Canter put forward a different three-part model, by which place “results from the relationship between actions, conceptions and physical attributes” (Gustafson, 2001, p. 6). Over the past forty years, research across disciplines has continued to produce varying three- and four-element model definitions of place; the organizational literature is no exception.

In their 2014 article, Guthey et. al. point out that much of the organizational sustainability literature adopts “an exclusively firm, process, or industry-level focus” of place. In response, they put forward a model which defines three elements of place for use in the business context: geographic location, locale, and sense of place. According to the researchers: geographic location is the spatial coordinates, topography, global nature and local ecosystems, locale is “the set of informational and institutional relations within which a place is located” (including history, politics, culture, economics, community, organizations) (p. 257, Figure 1) and sense of place alludes to the built environment, structure of feeling, people, and sensory embodiment (including interpretations, emotions, and meanings). In 2013, Shrivastava and Kennelly define place as “a built or natural landscape, possessing a unique geographical location, invested with meaning” (p. 84). They explaining the three dimensions as: location, the precise latitude, longitude and altitude; landscape, the physical dimension that is part of the natural environment as well as the built landscape (human created structures) which define the setting for social relationships; and meaning, “the product of lived human experience in the everyday world...the cultural and social dimensions that give places meaning” (Shrivastava & Kennelly, 2013, p. 88).

Several years previous, Thomas and Cross (2007) proposed a definition of place based on the combined models of geographer Robert Stack (1997) and sociologist Per Gustafson (2001). Thomas and Cross' representation consists of four 'realms': the natural environment, material environment, social relationships, and meaning. Within this model, the natural environment includes all the elements, forces, and spaces that occur naturally, i.e. are not man-made, including "the rocks and trees, hills and valleys, wind and rain, climate and gravity" (Thomas & Cross, 2007). The material environment is the realm of the man-made including buildings, roads, structures as well as the economy and all economic activities (Thomas & Cross, 2007). The social environment encompasses all human interaction – exchanges between strangers, family members, co-workers, etc., as well as the social context of the interactions and lasting patterns of interaction (family dynamics, interagency collaboration, and group conflicts) (Thomas & Cross, 2007). As for 'meaning', Thomas and Cross proposed that this fourth element of place overarches the other three realms, derived from and guiding the shaping of the social, natural, and material environments. Thus, their model not only shows that there are multiple elements of place, but that those elements have both distinctive and interrelated qualities.

For some researchers, 'meaning' is related to and/or synonymous with, the term 'sense of place', "the interpretation, meanings, and 'structure of feeling' associated with a place" (Guthey et al., 2014, p. 256). Shrivastava and Kennelly (2013) define sense of place as:

a personal connection with place encompassing feelings of identity with and attachment to a place, in all its complex dimensions. Sense of place is about knowing deeply and caring intensely about any unique place, region, or bioscape, including in a larger sense of the entire planet (p. 84).

In 2001 Per Gustafson outlined a "tentative analytical framework for mapping and understanding the attribution of meaning to places" (p. 5) in which the concept is mapped in a triangular

formation around and between three poles: self, others and environment. Gustafson's 'self' pole refers to the 'life path' of an individual as it relates to a particular place, namely somewhere the individual has lived for an extended time. Through 'others', "places are attributed meaning through the perceived characteristics, traits and behaviours of their inhabitants...often based on explicit comparisons between 'us'/'here' and 'them'/'there' (Gustafson, 2001, p. 10). The third pole, 'environment', is the label assigned by Gustafson (2001) to describe meanings of place that are based "neither on the self nor on relations with or perceptions of others", but "concern the physical environment, including the natural environment and various natural conditions (weather, seasons), as well as the built environment" (p. 10). In their triangular formation, Gustafson's (2001) meaning of place also includes interpretations at various positions between combinations of two poles at a time as well as at the intersection of all three, some themes involve all three poles of the self-others-environment model, "anonymity and citizenship are two themes that sometimes involve all three poles, although not always...traditions, festivals and anniversaries often implicate self, others and various environments" (p.11).

While there exists much overlap between the models of place both within and amongst various academic disciplines, to date, no single representation of place has emerged. However, the models put forward by most scholars tend to include factors of geographic position, natural environment, social relations, the built environment, and meaning or sense of place. The greatest discrepancies lie in how each of the components is defined as a part of or distinct from the others. Despite this recent cross-disciplinary exploration of place, few researchers provide insights into the tensions of place. One exception is geography scholar, Edward Relph, who asserts that place itself is rich with tension. The following section reviews the tensions of place as explored by Relph and forms the foundational understanding of potential tensions faced by PBEs.

The Tension of Place

As ‘rootedness in place’ is the first dimension of a PBE, understanding place-based tensions already explored through the place literature provides a foundation for insights into PBE tension. A phenomenological humanistic geographer (Gustafson, 2001), Relph is one of the earliest and most prominently cited scholars in the ‘place’ field. In his 2009 work, he explored ‘place versus placelessness’ as a core tension of place. The following section describes the manifestation of this tension and the potential implications for the PBE field.

According to Relph, place-placelessness is the tension between the simultaneous distinctiveness and sameness of a place in comparison to other places locally and/or around the world. He describes place and placelessness as “antitheses”, explaining, “If a place is somewhere, placelessness can be anywhere”, or nowhere at all (Relph, 2009, p. 24). However, in accordance with Relph’s description, no place can be purely unique or absolutely general, every place is composed of some combination of both; “no matter how distinctively different somewhere may appear, it always shares some of its features with other places” (Relph, 2009, p. 25). He explains, “it is helpful to think of place and placelessness arranged along a continuum and existing in a state of tension” (Relph, 2009, p. 25). Relph presents the red tile roofs and white walls as an example of the place-placelessness tension at play in traditional Mediterranean towns; where the features are shared or general between neighbouring places, but in comparison to places outside of the Mediterranean, they are distinct. At the other extreme, he describes that through the growth of a ‘spirit of place’, “even an initially placeless suburb gradually acquires its own identity, at least for many who live there” (Relph, 2009, p. 25). In this way, Relph’s place-

placelessness tension is influenced by such factors as the variability of ‘sense of place’ and the impact of globalization.

Relph also raises the role of globalization in the persistence of the place-placelessness tension. He posits that to a large extent, the place-placelessness tension revolves around the pressure for places to achieve “a healthy balance between preserving a sense of local identity, home, and community, yet doing what is necessary to survive in a global economic system” (Relph, 2009, p. 28). The place-placelessness tension has only gained relevance since the turn of the nineteenth century. Prior to industrialization, places were distinct by circumstance, it was simply too difficult and expensive to move building materials any great distance, “Traditions arose for the use of whatever was locally available” (Relph, 2009, p. 29). Following industrialization, the use of iron, concrete, metal and glass became widely available via cheaper transportation; efficiency and standardization were introduced to the process of place-building. With international materials came new fads and styles for buildings, homes, and décor that Relph (2009) describes as “self-consciously international” (p. 29). As places came to look more and more alike, ‘placelessness’ emerged. Soon, formally unique ‘places’ became more and more ‘placeless’, easily mistaken for other locations throughout the world (Relph, 2009).

In today’s globalized society, local and global economies are intimately linked. This link is felt in the everyday lives of ordinary people as they deal with such practical, place-based concerns as “health, education, pollution, and new development” (Relph, 2009, p. 30), but, also navigate “distant travel and economic and electronic connections around the globe” (Relph, 2009, p. 30). In this way, Relph’s place-based tension demonstrates how places need both localness to preserve their identity, and a global connection to maintain economic health in today’s hyper-connected world.

Place versus placelessness is the prominent place-based tension highlighted by place-scholar Edward Relph. Developing out of the ‘place’ literature, this tension helps to inform the potential tensions faced by PBEs relating to their first place-based typological dimension, ‘rootedness in place’. Place-placelessness offers a lens through which to analyze and understand the uniqueness and generalness of all place-based elements in relation to those of other places. The better PBE tensions around sense of place and globalization are understood, the better rooted in place the organization can be. This next section outlines the development of the sustainability literature and the overarching tensions found throughout, helping to build a better understanding of the second PBE typological dimension: sustainability orientation.

Sustainability Tensions

The challenges, tensions and shortcomings of the sustainability movement are well documented throughout recent literature. The downfalls of organization-based corporate social responsibility (CSR) initiatives in particular, provide key learnings for the ‘sustainability orientation’ dimension of the emerging PBE field.

In 1987, the ‘Brundtland Commission’, the World Commission on Environment and Development, offered a definition of ‘sustainable development’ that continues to gain broad use today: “development that meets the needs of the present, without compromising the ability of future generations to meet their own needs” (UNECE, 2005). The 1960s brought the introduction of the environmental movement (Eisenstein, 2011) and the notion of sustainability gained momentum by the mid-1970s in response to the unprecedented rise in human population (Shrivastava and Kennelly, 2013). Over the course of one hundred years the population quadrupled, from “1.6 billion in 1900 to 6.8 billion in 2000” (Shrivastava & Kennelly, 2013, p.

85), bringing increased global pressures to provide food, water, energy, etc. For the first time, modern society took notice of the physical and thermodynamic limits of the natural environment (Shrivastava and Kennelly, 2013).

As sustainability has primarily focused on preservation of the natural environment, the key tension involves the balancing of ever-growing economic demands and limited natural resources. However, despite the introduction of sustainability initiatives, environmental depletion has ballooned in direct correlation with ongoing economic development. Thus, today, concepts of ‘sustainability’ and ‘sustainable development’ are not only regarded as ineffective, but deceptive; increasingly accused of disguising global economic growth agendas behind purposefully weak, fruitless, and, in some cases, untruthful environmental initiatives (Shrivastava and Kennelly, 2013). As place-centric businesses participating in today’s growth-driven economy, the central sustainability tension between economic growth and environmental preservation remains a relevant tension for PBEs today.

Overlapping the ‘place’ and ‘sustainability’ literatures are several other organizational fields also dealing with tensions around place rootedness and sustainability orientation. These tensions, too, may help to inform potential challenges to the PBE mission. The following sections review the literatures dealing with tensions in the fields of eco-tourism and social enterprise.

Eco-tourism Tensions

In the 1970s, the concept of ecotourism developed out of the dual rise of the sustainable development and environmental consciousness movements. By the late 1990s ecotourism had grown to be the largest sector of the international tourism industry, with a growth rate estimated at ten to fifteen percent (Scheyvens, 1999, p. 245). Often associated with remote rural locations and/or protected natural wilderness areas, ecotourism destinations make for attractive retreats for travelers seeking to escape from urban centers and the hectic lifestyles they evoke. Within tourism policy and planning fields, the model has been traditionally touted as a win-win initiative, generating community-based economic returns through activities that advance the cultural and environmental wellbeing of ‘place’ (Higgins-Desbiolles, 2011). The World Conservation Union’s (IUCN) 2008 definition continues among one of the most widely used defining ecotourism as:

Environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features – both past and present) that promotes conservation, has low negative visitor impact, and provides for beneficially active socio-economic involvement of local populations (Higgins-Desbiolles, 2011, p. 554).

With a high dependency on place and advertised concern for sustainability, the tensions particular to the ecotourism industry present key learning opportunities for the PBE context.

The ecotourism literature notes two main benefits that ecotourism operations bring to the local places in which they operate. First, the popularity of ecotourism destinations makes for an effective source of income generation, even in highly remote areas. Although ecotourism activities can span an array of different ownership and profit-sharing forms, ecotourism brings

new money into communities. From the fresh flow of financial capital, ecotourism operations have been found to increase employment, project financing, and income-generating opportunities, such as tours, taxi services, and handicrafts, for small rural communities that would not otherwise have a demand for such services (Higgins-Desbiolles, 2011; Kerstetter and Bricker, 2009). Second, ecotourism has been credited with bringing an intimate focus on the interpretation of local environments and cultures. This enhanced local awareness has been found to bring a deeper understanding and appreciation of unique, place-based cultural and environmental characteristics among tourists and locals alike, leading to reported improvements in conservation of natural environments and the preservation of local cultures (Higgins-Desbiolles, 2011; Kerstetter and Bricker, 2009). As jobs, incomes, and new business opportunities increase, local governments also gain resources. In addition to an increased capacity to implement environmental management and protection processes, local governments gain the capability to improve local infrastructure and services which, in return, improve resident moral and tourist impressions, further increasing the shared will to protect and preserve precious resources and traditions (Higgins-Desbiolles, 2011).

However, not all parties agree that ecotourism is a win-win endeavor. Critics suggest that ecotourism, “contains the tensions of an oxymoron” (Higgins-Desbiolles, 2011, p. 553). The central tension of ecotourism lies between the pursuit of corporate profit and the wellbeing of place. Growing research presents that any environmental, economic, and cultural benefits provided to local communities via ecotourism activities are over shadowed by forces that result in more harm than good. As the environmental literature shows, even in the most benign niches of ecotourism, tensions are inherent and arise from “the efforts to sustain environmental integrity

while simultaneously attempting to extract wealth for development” (Higgins-Desbiolles, 2011, p. 553).

As the demand for more remote, natural and exotic tourism environments continues to increase, so too does the potential for irreparable damage as ecotourism operations encroach further and further on the world’s few remaining pristine and biologically diverse areas. Such problems as deforestation, crowding, litter, and problems with waste disposal and sanitation are among the most commonly documented (Kerstetter and Bricker, 2009). According to the work of Higgins-Desbiolles (2011) on the ecotourism development at Kangaroo Island, South Australia, “the requirements of environmental protection were ‘traded off’ in the pursuit of tourism development and the income and employment it provides” (Higgins-Desbiolles, 2011, p. 554). It is from a growing number of such case studies, that ecotourism stands accused of ‘green washing’. The ecotourism industry is said to “adopt a language of environmental responsibility”, ‘green speak’, and promote a ‘clean green image’”, while allowing profits to override actual environmentally-positive initiatives (Higgins-Desbiolles, 2011, p. 555). In an era dominated by financial gains, ecotourism initiatives have been found to support the trading off of environmental conservation needs for greater economic growth.

While early study of ecotourism impacts focused mostly on environmental concerns, more and more research in the field has expanded to examine the ‘benefit’ of ecotourism on the ‘active socio-economic involvement of local populations’, as described in the definition (Scheyvens, 1999). Similar to the growing concerns around environmental impact, the economic and cultural impacts of ecotourism are also criticized for causing more harm than good. For many rural peoples, the health of the physical environment is central to their traditions and way of life. Researchers found that in some cases, ecotourism-based communities actually suffer from

the influx of economic resources due to inexperience and lack of education around financial management. Kerstetter and Bricker (2009) report, “short-term revenue derived from a newly built infrastructure may not cover all operational costs, leaving the potential for long-term impacts that will reduce governments’ ability to fund other necessary public services” (p. 692). In their work on ecotourism in the Nordic regions, Hall et. al. (2009) explore the risks to local cultures when exposed to the various cultural backgrounds and expressions of visiting tourists. Despite the place-based advantages that can arise when local cultures and traditions are celebrated, the value and meaning that places hold for residents is often ignored by ecotourism developers which runs “the risk of destroying authentic places and/or producing inauthentic ones” (Kerstetter and Bricker, 2009, p. 692). Alluding to their work on the ecotourism industry in Fiji, Kerstetter and Bricker (2009) point to the interrelated nature of the core tension at hand,

In Fiji, ignoring the value and meaning of places undergoing tourism development may result in the loss of the very cultural and natural assets that attract tourists. For example, daily life for Fijians is quite diverse and often dependent on the place (e.g. village) they inhabit and/or make their living. If this diversity is not acknowledged by tourism planners, not only will the lives of Fijians be impacted, but so too will the potential for tourism as a sustainable development strategy” (p. 691).

Beyond the tensions surrounding ecotourism owners and operators, eco-tourists have also been found to perpetuate ecotourism tensions. The term ‘egotourists’ has been applied to those ecotourists who “seek highly luxurious and exclusive access to pristine nature in order to enhance their social status” (Higgins-Desbiolles, 2011, p. 555). Ultimately, “when business is the main driving force behind ecotourism it is not surprising that the ventures which emerge may serve to alienate, rather than benefit, local communities” (Scheyvens, 1999, p. 245). Furthermore, the research has shown, the more rural and remote the area, the greater the economic challenges

it faces, the greater the opportunity for cultural and environmental damage, and the less experience it has to protect its sacred capital.

Both the tensions of the place and sustainability literature are found at play in the ecotourism literature. Relph's place-placelessness tension is core to the travel and tourism industry, as some 800 million people travel the globe each year (Kerstetter & Bricker, 2009). Many tourists travel in search of novelty, leaving warm weather for a week in the mountains or a world city for a quiet beach, for example. However, Relph (2009) notes that if all places were absolutely unique, they would lack the familiar clues needed for navigating the basics of day to day life, "In a world of unique places, travel would be enormously difficult because nothing would be familiar; in a perfectly placeless world, travel would be pointless" (p. 25). Travellers would find it difficult or near impossible to know where to eat, sleep, or receive medical help, for example. On the other hand, if all places were exactly alike, that is placeless, there would be no need to travel at all as every place would be the same as the one just left (Relph, 2009). Thus to be successful, ecotourism organizations must find a balance between providing their guests with a unique, novel experience, but also supplying them with what they have come to expect of a tourism experience, in terms of services and amenities.

The sustainability tension between the wellness of place and growth of organizations operating within those places is also prominent in the ecotourism literature. Like the sustainability movement, the ecotourism industry distinguishes itself from all other forms of tourism purely on its environmental responsibility and the socio-economic benefits it brings to the places out of which operations are based. However, as the literature indicates, the sustainability tension lies in the balance of economic growth and the success of the organization

on one side and the wellness of place on the other. As a model of sustainability, ecotourism is generally dismissed as ineffective but provides applicable insights into potential tension areas for PBEs.

In her 1999 work, Scheyvens develops an empowerment framework described as a community-based approach to ecotourism that “recognizes the need to promote both the quality of life of people *and* the conservation of resources” (p. 246). She suggests approaching community-based ecotourism from a developmental perspective composed of four elements of empowerment: psychological, social, political and economic. Around the same time, National Geographic senior Jonathan B. Tourtellot and his wife, Sally Bensusen were popularizing the concept of geotourism in an effort to develop a new concept of tourism that sheds the poor history of ecotourism. Defined as “tourism that sustains or enhances the geographical character of a place – its environment, culture, aesthetics, heritage, and the well-being of its residents” (National Geographic, 2016), Tourtellot and Bensusen were advocating for a respect-based approach to tourism and a focus not only on environmental preservation, but also the protection of cultural, historic, and scenic assets of place. Such efforts to revamp, re-think and ultimately improve the geotourism industry, stemming from both the academic and practitioner realms, provide further insights into the nature and severity of potential tensions to be encountered in the PBE field.

Social Enterprise Tensions

Social enterprise (SE) is another research area through which the tensions of place-rootedness and sustainability orientation that can be explored to gain insights regarding potential tensions challenging PBEs. SEs are organizations that “seek to solve social problems through

business ventures” (Smith, et. al., 2013, p. 408). What makes the SE model distinct is the unique intersection of for-profit and non-profit business practices, combining “the efficiency, innovation, and resources of a traditional for-profit firm with the passion, values, and mission of a not-for-profit organization” (Smith, et. al., 2013, p. 408). Whereas organizational missions within the ecotourism industry remain generally consistent, the balance of business success with the social and environmental welfare of the local place, the mission from one social enterprises to another can vary widely. However, as Elmes, et. al. (2012) point out:

effective social entrepreneurship is rooted in...places, arising from the social and technological innovations that shape lived-experiences in distinct places (from homes to communities to states) where people often have limited ability to respond to problems or to shape how things work (or should work) to meet their needs (p. 534).

Thus, place rootedness and sustainability orientation are common to many SEs, and understanding the tensions that arise in this field may help to inform the PBE literature. This section explores the insights of place-based and sustainability tensions found throughout the SE field.

In 2013, Smith et. al. conducted an in-depth analysis of the tensions faced by SEs. The researchers use Smith & Lewis’ (2011) paradoxes of learning, belonging, organizing and performing to explore the social-economic tension in the SE context. Learning tensions arise for SEs in light of operations that span multiple time horizons, “as organizations strive for growth, scale, and flexibility over the long term, while also seeking stability and certainty in the short term” (Smith, et. al., 2013, p. 413). Where profits, revenues and costs (the lead motivating factors of traditional for-profit organizations) are based around short-term timelines, social missions (such as climate change action, alleviating poverty, or overcoming economic injustice) need much longer timeframes to achieve. SE belonging tensions, are tensions of identity amongst organizational stakeholders and the organizational identity itself, “While all these stakeholders

may value the combined social and business purposes of a social enterprise, they also seek to connect with the organization through their particular identities” (Smith, et. al., 2013, p. 412). The organizational identity of the SE itself is in tension when traditional for-profits accuse them of low business standards, and traditional non-profits work to punch holes in SE social missions (Smith, et. al., 2013). Organizing tensions emerge “through commitments to contradictory organizational structures, cultures, practices, and processes” (Smith & Lewis, 2011, p. 411). In this way, hiring policies, organizational structures and legal forms pose some of the greatest organizing tensions for SEs, especially for those whose social mandates revolve around justice and/or equality in those arenas. The final tension, performing paradox, arises from the fundamental conflict between equally-emphasized goals of social and economic success. It is often the case for SEs that success in one critical domain is considered failure in the other and thus SEs typically struggle with defining success over all (Smith, et. al., 2013).

The essence of a SE is made up of the very tension that underscores the sustainability movement. All four tensions outlined in the SE literature speak to the tension between economic success and social mission. It is, perhaps, most prominent within the performing paradox as organizations actively operate between two conflicting definitions of success. While not every SE touts global sustainability as its goal, all have a mandate to address some aspect of social need and/or environmental benefit, and as such, the attempt to balance economic success with social (including environmental) impact is the root of each of Smith et al.’s (2013) tensions.

Unlike the sustainability movement or ecotourism developments to date, SE is widely viewed as a successful sustainability endeavor. Success, however, is recognized as intertwined with the very tensions that challenge SE initiatives and at the heart of those tensions is the notion of ‘place’. According to Guthey et al. (2014) “the success of social enterprise is due in part to the

willingness and ability of social innovators to engage with messy problems informed by the complex histories and dynamics of particular places” (p. 262).

Following the discussion of tensions found throughout the place, sustainability, ecotourism and social enterprise literatures, the next section reviews the tension literature itself. Paradox theory is an emergent area made popular in 2011 by organizational scholars Wendy Smith and Marianne Lewis. Paradox theory distinguishes between different occurrences of tensions based upon elements of contradiction and interrelation. The paradox work of Smith and Lewis provides the framework by which PBE tensions can be analyzed.

Organizational Tensions

Prior to 1988, management scholars approached organizational tensions with an ‘either-or’ approach, developing theoretical models to evaluate and select between contradictory demands (Smith & Lewis, 2011). In his 1988 Competing Values Model, Robert E. Quinn was one of the first organizational researchers to suggest the advantages of attending to perceptually contrasting demands at once. He suggested that organizations face tensions for which a ‘both-and’ approach is advantageous over the traditional ‘either-or’ view, “In a certain situation an effective manager may behave in a way that is both caring and demanding; or a manager may take a position that advocates both change and stability” (Quinn et. al., 1991, p. 218). Quinn referred to such situations as ‘paradoxical’ and the coming together of two or more seemingly opposing demands, a ‘paradox’. That same year Quinn teamed with Cameron praising paradox as a “potentially powerful framework for examining the impacts of plurality and change, aiding understandings of divergent perspectives and disruptive experiences” (Lewis, 2000, 760).

One year later Poole and van de Ven (1989) recognized tensions, oppositions, and contradictions within explanations of the same social theory phenomena and suggested four modes of working with paradoxes to advance organizational theory. By 2011, Wendy Smith and Marianne Lewis presented paradox itself as an emergent theory of organizational and management science, highlighting two decades of research pointing to paradox as a viable and compelling lens for understanding long-term organizational management. They posit, “Although choosing among competing tensions might aid short-term performance, a paradox perspective argues that long-term sustainability requires continuous efforts to meet multiple, divergent demands” (Smith & Lewis, 2011, p. 381). Through their theory of paradox, Smith and Lewis present a definition of paradox which remains prevalent today: “We define paradox as contradictory yet interrelated elements that exist simultaneously and persist over time” (Smith & Lewis, 2011, p. 382). With this definition, Smith and Lewis highlight the two key components of a paradox: first, an underlying tension or tensions - “that is, elements that seem logical individually but inconsistent and even absurd when juxtaposed” and second, “responses that embrace tensions simultaneously” (Smith & Lewis, 2011, p. 382).

Smith and Lewis (2011) further enhance understanding of the paradox concept by differentiating it from other such organizational tensions as dilemmas and dialectics. A dilemma, they explain, “denotes a tension such that each competing alternative poses clear advantages and disadvantages” (Smith & Lewis, 2011, p. 386), thus a dilemma can be resolved via weighing pros and cons of each option and making a choice. Next, a dialectic involves “resolving tensions through integration” (Smith & Lewis, 2011, p. 386), that is finding a way to merge competing options together into a combined solution. Dilemma and dialectic approaches to tensions focus on the resolution of tensions, but if a tension is paradoxical, that is interrelated and persistent,

resolution-based approaches are effective only in the short term. The paradox perspective, on the other hand, acknowledges the ongoing nature of tensions and instead of seeking to resolve it, pursues ways of managing the conflicting forces, often gaining new organizational insights and opportunities (Smith & Lewis, 2011).

Although new to the field of organizational theory, paradox finds its roots in such ancient Eastern and Western teachings as the classic Chinese text Tao Te Ching and the Judeo-Christian Bible (Smith & Lewis 2014, p. 28). The ancient Greeks and Existentialists pondered the paradoxical forces of life and death, good and evil, and self and other (Lewis, 2000, 761), influencing the works of such 19th century philosophers Kierkegaard, Hegel, Hampden-Turner, and Weber (Smith & Lewis 2011). In her 2000 publication, Lewis uses the Taoist symbol of Yin-Yang as a metaphor to illustrate the equal opposing nature of paradox's conflicting forces and their simultaneous, synergistic interrelation within the whole of a larger encompassing system within the management field (see Figure 2).



Figure 2: Yin-yang

Smith and Lewis (2014) draw on the same metaphor describing it as follows:

The boundaries separating the elements highlight their distinctions, reinforced by formal logic that encourages either/or thinking and accentuates differences. The external boundary integrates the overall system and highlights synergies; yet it also binds and juxtaposes opposing elements and amplifies their paradoxical nature, creating a dynamic relationship between dualities and ensuring their persistence over time (p. 23).

To further understanding and application of paradox theory, Smith and Lewis (2011) catalog organizational paradoxes into four distinct categories: learning, belonging, organizing, and performing, building on the earlier work of Lewis (2000) and Luscher and Lewis (2009).

Learning paradoxes are tensions of knowledge, “efforts to adjust, renew, change, and innovate foster tensions between building upon and destroying the past to create the future” (Smith & Lewis, 2011, p. 383, Figure 1). Belonging paradoxes are tensions of identity; “these tensions arise between the individual and the collective, as individuals and groups seek both homogeneity and distinction” in light of competing values, roles and memberships (Smith & Lewis, 2011, p. 383). Organizing paradoxes revolve around processes; as complex systems require such juxtaposed approaches as collaboration and competition, empowerment and direction, and control and flexibility (Smith & Lewis, 2011). Performing paradoxes present tensions around competing goals and strategies that stem from the plurality of stakeholders and their differing perceptions of success (Smith & Lewis, 2011).

According to Smith and Lewis (2014), “modern organizations contain a wide variety of tensions that leaders must deal with every day” (p. 23). They name collaboration versus control, flexibility versus efficiency, individual versus collective, and profit versus social responsibility, as just a few, and assert that organizational demands are prime to intensify “as organizational environments become more global, dynamic and competitive” (Smith & Lewis, 2011, p. 381).

Ultimately, the paradox literature provides a lens through which to better understand the ongoing tensions of sustainability and place.

In summary, the most recent developments in the place-based literature indicate that PBEs could offer a more holistic, and thus, more viable approach to organization-led sustainability initiatives. (Guthey, et. al., 2014; Shrivastava and Kennelly, 2013; Thomas, et. al., 2008). Thus, identifying the tensions they face and how those PBE tensions manifest is key to understanding the full potential of the model. However, there exists a gap in the organizational literature as it pertains to such tensions. A place-based focus on sustainability initiatives is a relatively new concept only gaining cross-discipline popularity over the past couple of decades. Although Shrivastava's 1994 critique launched a rise in sustainability-based studies in the organizational field, it has been less than ten years since the relationship between organization, place, and sustainability has been broadly explored by management scholars, and the PBE concept was only introduced by Shrivastava and Kennelly in 2013. Thus, there remains a lack of empirical understanding around PBEs and the tensions they face. However, place-based nature and manifestation of the tensions known to the fields of place, sustainability, ecotourism and SE, as reviewed, provide a valuable foundation from which to study the tensions specific to PBEs.

The goal of this research is to contribute to the sustainability and PBE literatures by addressing the research question: what are the tensions facing PBEs and how do they manifest? The definition of place used throughout this study will be that of Thomas and Cross' 2007 model whereby place is defined by four elements – social relations, natural environment, material environment, and meaning, with the meaning element overarching the previous three. While

scholars' understanding of place continues to evolve, the Thomas and Cross (2007) definition was selected due to the conceptual clarity it brings to the organizational context. The following study presents an in-depth qualitative analysis of the Shorefast Foundation, a PBE based on Fogo Island, Newfoundland.

METHODS

Research Context: The Shorefast Foundation - A Place-Based Enterprise

The Shorefast Foundation (Shorefast) is a registered charity on Fogo Island, a small, remote collection of communities off the north-east coast of Newfoundland and Labrador, Canada. The largest island off the province's shores, Fogo Island is a 45-minute ferry ride off the northeast coast of the island portion of Newfoundland and Labrador, stretching an area of 110 square miles (Shorefast Foundation, 2015). First appearing on early mariners' maps in the sixteenth century, the small, coastal communities of Fogo Island settled in the early seventeenth hundreds and remained independent and relatively isolated (possessing their own school houses and governance bodies) until the March 1, 2011 amalgamation formed the unified Town of Fogo Island. The Town of Fogo Island came to consist of four towns and a regional council (townoffogoisland.ca).

Early settlers to the island came for the codfish and stayed for the codfish. Like most Newfoundland and Labrador outport communities, Fogo Islanders almost exclusively fished cod for a living (Shorefast, 2016) until the early 1990s when the Canadian government declared a moratorium on northern cod off the east and northeast coast of Newfoundland and southern Labrador in accordance with evidence of a near total collapse of the stocks (McCay et al., 2011).

The moratorium was only intended for two years, (McCay et al., 2011), but remained in effect over 20 years later. The economy of Fogo Island declined and many of the inhabitants found themselves out of work (Lewis, 2012). In just 15 years, the population fell by thirty percent, from 3,915 in 1991 to 2,706 in 2006 (Newfoundland and Labrador, 2006). Despite hardship, the communities of Fogo Island fought desertion and resettlement through a combination of ongoing rural development initiatives, including the creation of a fishers' cooperative, and the efforts of the Shorefast Foundation (McCay et al., 2011). Founded in 2006 by retired telecommunications executive and Fogo Island native, Zita Cobb, Shorefast strove to bring economic and cultural resilience to Fogo Island. Shorefast's mandate was to develop a new model of cultural and economic resilience on Fogo Island (Shorefast, 2016).

Today, Shorefast represents an important example of a place-based enterprise. According to Shrivastava and Kennelly's PBE definition, the Shorefast Foundation satisfies all three elements: a local or place-based locus of ownership and control, embeddedness or rootedness in the physical, social and human capital of a place, and possessing a sense of place and a social mission. First, Shorefast has a place-based locus of ownership and control. Founded and led by Fogo Island native Zita Cobb and her two brothers, each of the siblings grew up on the island, maintain properties there, and spend a portion of every year living on Fogo Island fulfilling operational and/or board-level roles within the organization. Second, Shorefast is deeply embedded in the physical, social and human capital of place. Linking intimately with the natural, social, and built elements of the local environment, the Foundation has entrenched the wellbeing of place in its mandate: "to make a meaningful contribution to the continued cultural, economic and social resiliency of small communities and develop a model that can serve as guide for

others interested in contributing to the vibrancy of contemporary rural communities” (Shorefast, 2016). Finally, Shorefast possesses a social mission which revolves specifically around cultivating, promoting and sharing a sense of place on Fogo Island. The Shorefast Foundation was founded upon three guiding principles, the first of which states: “There is inherent, irreplaceable value in place itself and that the key to sustainability lies in nurturing the specificity of place: in the intellectual heritage and cultural wisdom, talent, knowledge and abundance that exists naturally in each place” (Shorefast, 2016). According to Cobb, “It’s not that Fogo Island is special; it is that it’s specific ” (Cobb, D3). Shorefast provides an example of Shrivastava and Kennelly’s two dimensional PBE topology: the organization is deeply rooted in place and built around a sustainability orientation. Furthermore, upon founding the Inn, Shorefast signed the geotourism charter (see Appendix A: Geotourism Charter), a two-paged agreement that serves as a guideline and a show of commitment to the principles of deep place-based respect. Through several of their initiatives, Shorefast introduced the geotourism industry to Fogo Island as the means through which the PBE would pursue economic and cultural resilience that was, at once, rooted in place and contained a sustainability orientation.

Shorefast’s flagship operation is the Fogo Island Inn, a 29-room, five-star destination that attracts guests to Fogo Island from all over the world. The Inn opened in May 2013 as a social enterprise seeking to “use business-minded ways to achieve social ends” (Shorefast, 2016). The primary goal of the Inn is to diversify the Fogo Island economy, introduce tourism as a secondary industry to the local fishery, and attract new, international money into the local economy. The Inn provides local people with new job opportunities and facilitated the enhancement, diversification, and transfer of skills from fishing to hospitality. Further, the Fogo Island Inn presents a business context through which cultural and environmental wellness are not

only preserved, but celebrated with natural and cultural heritage as the main differentiator. As the Inn's website states, "Fogo Island Inn was an opportunity to use social business and design as a means of fortifying culture and place, while at the same time giving Fogo Island relevance in the contemporary world and enhancing the economic prospects for the community" (Fogo Island Inn, 2016). Similar to a non-profit, all revenues generated through the Inn go back into its operation, with a portion of eventual profits to be donated to the broader community (Fogo Island Inn, 2016). Like a for-profit enterprise, the Fogo Island Inn is designed to provide Shorefast with an economic engine, with the hopes of bringing the entire organization and community closer to economic independence and long-term viability.

In 2014, Shorefast launched their second social enterprise, the Fogo Island Shop. The Shop, as it is commonly called, is a furniture business that launched in response to visitors' enthusiasm and demand for the locally-made custom pieces found throughout the Inn. Like the Inn, revenues of the Shop are to be invested back into Shorefast to support the operations of all its other place-based endeavors. Such operations include: Fogo Island Arts, a residency-based program which brings contemporary artists, filmmakers, writers, musicians, curators, designers, and thinkers from all over the world to Fogo Island; and a third social enterprise endeavor, the Fogo Island Business Assistance Fund which offers business plan guidance, financial advice, training and loans to aspiring business owners on Fogo Island and neighbouring Change Islands.

'New ways with old things' is one of the key guiding philosophies of the Shorefast Foundation, used extensively throughout both internal and external faucets of their communications, management and operational strategies. Of the Inn, the website describes, "The goal was to 'find new ways with old things' in order to both preserve and stimulate cultural

production on Fogo Island and to create restorative spaces for guests who come to the Inn for refuge from the noisy, busy storms of modernity” (Fogo Island Inn, 2016, Architecture).

Research Design

The theoretical insights of this research were derived from a one-month inductive, single-case study of the Shorefast Foundation. A qualitative approach was selected on the basis of gaining insight into Shorefast’s approach to geotourism. A multi-method study approach was used employing qualitative semi-structured interviews, field observation, and archival data of industry and non-industry websites, articles, and texts. I used these three data sources for my study as I deemed them to be the most appropriate for addressing my research question and filling the gaps revealed through my literature review. I organized and interpreted my data using a case study approach whereby Shorefast associates were studied in-depth (Mason, 2002). Qualitative methods allowed for a contextualized, nuanced approach which provided a valuable lens for investigating Shorefast associates’ perspectives on the tensions surrounding the organization’s geotourism initiatives on Fogo Island. The exploratory, fluid and context-sensitive technique was the most appropriate for the case study approach (Mason, 2002). The qualitative methods were context-sensitive emphasizing the local, situated, and contextualized elements of Fogo Island (Mason, 2002). Qualitative, semi-structured interviews allowed for rich, personal, first-hand accounts, observations provided essential context, while a qualitative textual analysis of various websites and documents helped to illustrate the socio-political context at the local level.

Data Sources

This study employed an inductive theory building approach and qualitative research strategy including semi-structured interviews, field observations, and secondary sources. These three data sources were selected as the most appropriate methods by which to gain the insights necessary to answer the research question at hand.

Semi-Structured Interviews. A total of twenty-three (23) Shorefast-focused interviews were conducted between October 1, 2015 and May 31, 2016. Participants included Shorefast board members, founders, employees, and contractors. The interview demographic represented varying age groups from across the organization, is split evenly between those identifying as male (11) and female (12) respondents, and balanced between participants native to Fogo Island and those from away. Twenty of the twenty-three interviews were conducted on Fogo Island during one of two trips made by the researcher, a 5-week stay in the fall of 2015 and a 4-week stay in the spring of 2016. One interview was conducted over the phone and the remaining two took place in a meeting room on Memorial University campus in St. John's, Newfoundland. The qualitative, semi-structured interview style allowed for rich, personal, first-hand accounts of participant views and experiences.

All interviews were qualitative, semi-structured and ranged from around 50 minutes to 2 hours. Average interview length was approximately 60 minutes. Consent forms were reviewed, questions/concerns addressed, and consent gained before each interview began (see Appendix C: Informed Consent Form), and all interviews were recorded using a digital audio recording device. The semi-structured format of the interviews allowed for spontaneity, openness and flexibility according to a participant's background, position, experience, and comfort level. Questions were

thematically organized around such topics as: what drew participants to work with Shorefast, their interpretations of the geotourism initiative, and a recalling of most positive and challenging elements of the job. At the conclusion of each interview the audio file was downloaded to a password protected computer and a detailed summary of the impressions and insights gained throughout the session was completed and stored on the same computer.

Field Observations. Throughout both stays on Fogo Island, I gained additional insights into PBE tensions through informal conversations with Shorefast personnel, artists-in-residence, and local residents. I also attended several public Shorefast events including presentations by an artist-in-residence, visiting artists, and a group of architectural students. Detailed summaries of impressions and insights were written following several observations and stored in electronic documents on a password protected computer. These observations lent rich context to data generated from formal interviews.

Archival Documents and Secondary Sources. Archival material and secondary data also informed this research. Throughout the research process, I gathered public information via news publications, articles, documentaries, and books covering Shorefast activities and community impressions. The 'Press' section of both the Fogo Island Inn and Shorefast Foundation webpages provided a list of media coverage on the organization. As well, the websites of each Shorefast branch were useful in disclosing key information on many of the ongoing activities and philosophies. Statistics on the Fogo Island region were accessed through the town website and Statistics Canada reports. The National Film Board 1960s film series, 'The Fogo Process', provided rich cultural insights into the importance of ongoing traditions on the island. Such

recent film projects as the recording of Cobb's 2014 presentation at Toronto's D3 conference and 2014 documentary, 'Strange and Familiar', were both available for public viewing in the Fogo island Inn cinema and were consulted for their informative perspective on Shorefast operations.

Analysis. The first stage of the data analysis process began by coding the detailed notes taken after each interview and observation. A semi-structured, theme-based coding scheme was used working along themes of place, sustainability, tradition, and tensions. Next, according to the coded interview notes, the first set of key transcripts were identified and transcribed (approximately four to five interviews in total). These transcripts were then manually coded via an inductive coding process which revealed a second -level of themes including tensions and conflicts around new and old, innovation and tradition, and renewal and preservation. I analyzed all transcribed texts at this stage according to the same set of codes to help ensure consistency. The thematic analysis of this first set of key transcripts led to initial insights into both general and specific areas of tension throughout Shorefast. Key quotes from each file were then entered into data tables organized by theme for further analysis.

For the second stage of the data analysis process, I returned to my original interview notes analyzing them according to the second-level codes that emerged from the first round of transcribed interview. From there I identified the next four to five interviews to be analyzed and listened to the audio of each file in full to identifying the key segments according to the second-level codes. The key segments were then transcribed, organized into the data tables, and the overall insights further refined. This second stage data analysis was repeated until all key insights were effectively extracted from interview transcripts and the iterative analysis revealed

the findings of this study. I transcribed, coded, and analyzed all data personally, and thus remained actively engaged with the data throughout the various processes of my project.

As a PBE committed to geotourism, social entrepreneurship, and place-centric leadership, the Shorefast Foundation presented a compelling research context. The qualitative, case study approach allowed for a context-sensitive, dynamic approach to data collection and the identification of pertinent themes was central to the analysis process. Through 23 semi-structured interviews, various observations and the collection and review of key secondary sources, in-depth, generalizable insights into the core PBE tensions were gained.

FINDINGS

From its settlement in the early 1700s to the cod moratorium of 1992, all four elements of place on Fogo Island - the social relations, material structures and economy, natural environment, and meaning – have revolved around a single industry, the cod fishery. The steady decline of the cod stocks across the local fishing grounds throughout the 1980s marked a fundamental change on Fogo Island. Two decades later, the Shorefast Foundation introduced geotourism to Fogo Island, a new industry with the goal to revitalize economic and cultural resiliency.

The introduction of geotourism on Fogo Island was, perhaps, the largest-scale application of the organization's 'new ways with old things' philosophy. Geotourism offered a new way of preserving the place-based elements of the past while simultaneously renewing them to ensure the wellbeing of the future. Although the introduction of geotourism on Fogo Island brought fundamental change, it was specifically selected for its holistic approach to place-based wellness.

As one participant suggested, “without something here, other than fishing...to help the island, it’s not going to survive. This change, bringing in the Inn, is a much smaller change [than] what could be”, alluding to such alternatives as the introduction of fast food chains and/or box stores, for example, or leaving the Fogo Island economy to decline with no intervention at all. Another participant described the place-based elements considered within Shorefast’s geotourism approach:

if you’re going to develop an industry of some kind around the idea of people coming to visit, well you have to think of the community in all of its manifestations. You have to think about the lichens, you have to think about the people, you have to think about the dead people, you have to think about the future people, you have to think about the dignity of the guest, you have to see it as whole.

As a PBE, Shorefast strove to bring just enough ‘new ways’ to Fogo Island to enable the long-term preservation of all the ‘old things’ that made the island a distinct and special place in the world. Or, as another participant summarized, “We are changing to stay the same”.

Although ‘new ways with old things’ brought a new hope to the future of Fogo Island, this research revealed that in practice, it proved a complex and challenging initiative. In an effort to simultaneously change while staying the same, that is, revitalize place on Fogo Island while maintaining a deep, rich connection to the past, Shorefast encountered six PBE tensions: economic capital versus sacred capital, commercial tourism industry culture versus fishing-based employment culture, the appeal of remoteness versus inconvenience of isolation, organizational success versus business community success, operational investment versus cultural asset investment, and non-local hiring versus local hiring. PBE tensions were inconsistencies and/or challenges that arose when PBEs simultaneously incorporated one or more place-based elements to balance rootedness in place and sustainability orientation throughout their day-to-day

operations. The following section describes the six PBE tensions revealed through Shorefast's initiative to find 'new ways' with the traditional elements of place on Fogo Island.

Economic Capital versus Sacred Capital

Of all the industries that might have brought economic resilience to Fogo Island, Shorefast selected geotourism for its respect-based approach to the wellbeing of all place-based elements of Fogo Island. "To me geotourism is the best way to stay whole" commented one participant. According to interview discussions, sacred capital encapsulated all the non-financial forms of capital that brought value to Shorefast and Fogo Island. The particular emphasis of sacred capital was on the natural environment and local culture. As such, several participants noted that their work at Shorefast was guided by the following organizational principle: "nature and culture are the two most important things and business and technology should serve them".

While Shorefast's geotourism success was based on a respect-based approach to sacred capital, it also relied on the marketing of the Fogo Island geotourism experience. As the preservation of sacred capital was key to making Fogo Island resilient, it was also central to the place-based experience that Shorefast was providing to visiting tourists. However, it was the attraction of those same Fogo Island visitors that posed potential challenges to the island's future wellbeing. Tourists brought such environmental concerns as increased garbage, carbon emissions and trampling of the natural landscape. They presented greater demands and wear on material elements, and the introduction of new social influences held the potential to dilute local social relations and perceptions of place. Thus, while Shorefast's introduction of geotourism was key to protecting sacred capital on Fogo Island, it also risked undermining it.

The economic versus sacred capital tension for Shorefast manifested as a “money-sacred capital collision”, as one participant described. For Shorefast, the money-sacred capital collision was a philosophical tension that surrounded the very premise of the tourism industry, that is, the generation of profit through the marketing of place and place-based experiences. As one participant explained,

There is a whole money-sacred capital collision that happens every time someone goes to look at lions in Africa or come to experience the North Atlantic. We’re bringing - not just money, we’re bringing people and people are sacred, but money can distort super easily, unless we help the people who have the money or control the money.

Geotourism on Fogo Island was reported to bring a fresh perspective to the local culture and natural environment, which enhanced local pride amongst residence. On the other hand, some participants expressed worry that the marketing of the ‘Fogo Island experience’ to tourists had the potential to cause harm if not executed carefully. Several participants referred to other tourism destinations in various parts of the world that had become “amusement parks”, or fake versions of themselves. As one such participant described, “There’s a lot of places you go and travel, you experience a fake version of that place... It’s like going to Disneyland, it ain’t real”. One participant described the phenomena as “reducing something sacred to something that can be consumed”.

Several interviewees also expressed an awareness of the potentially negative impact that the economic-sacred capital tension could have on visitors to Fogo Island. “It goes both ways”, observed one participant of the tourism industry in general, “this attitude [by tourism operators] of ‘let’s get a few dollars off of the tourists’ isn’t pretty, nor is ‘let me drive by and get what I want when I want it and move on’ [by tourists]”. While Shorefast promoted the growth of the

tourism industry to enhance both sacred and economic capital on Fogo Island, several participants expressed concern that the popularity of tourism on Fogo Island could encourage the launch of less-respectful tourism businesses in the future. “Certain kinds of business that can come with the tourism market can – instead of investing in the culture, exploit the culture”, suggested one participant, such as “some event that you do that’s just totally cheesy to grab a buck off of a consumer”. In this way, participants described how the introduction of new tourism operations and their approach to financial success could both further and harm the economic and sacred capital success throughout the community.

Shorefast introduced the geotourism industry on Fogo Island for the opportunities it presented around the revitalization of the natural environment, social relations, material structures and meaning of place throughout the island. While the new industry brought such benefits as new economic capital, new people, renewed pride and increased business opportunities, it also created potential concerns surrounding the environment, material elements, social relations, authenticity of place, and visitor experience. In this way, the money-sacred capital collision surrounding tourism on Fogo Island presented Shorefast with a complex PBE tension between economic and sacred capital.

Commercial Tourism Industry Culture versus Fishing-Based Employment Culture

A key goal of Shorefast’s efforts to restore economic and cultural resiliency on Fogo Island was the creation of new employment opportunities for local people. The majority of local people employed by Shorefast were hired to work at the Fogo Island Inn taking care of guests from all over the world. From one perspective, the hiring of local people into the commercialized hospitality industry was well-aligned with the relaxed, welcoming and generous nature of the

local Fogo Island people and their way of life. This natural sense of hospitality lent well to the formalized responsibilities of taking care of visiting guests, so much so that the charm of the local staff proved to be one of the main draws for visitors. At the same time, however, the slow-paced, seasonal nature of the fishing-based employment culture on Fogo Island conflicted with the speed and pressure of the commercial tourism industry. In this way, the simultaneous compatibility and incompatibility of the traditional fishing job culture with the non-traditional commercial hospitality culture for local employees on Fogo Island formed the second PBE tension for Shorefast.

Until the arrival of Shorefast, Fogo Island was a single-industry community with a way of life that, for generations, had revolved around the local fishery. A big part of the fishing-based culture was extreme weather conditions and physical isolation from much of the wider world. Such conditions led the Fogo Island people to develop a deep sense of community and a culture of care amongst families and neighbours. As one participant described, “the people from Fogo Island, and Newfoundlanders in general, have that deep sense of hospitality...They’ll invite you in, they’ll make you feel good”. While the intrinsic generosity that grew out of the local fishing culture was well suited to commercial hospitality on Fogo Island, other elements of the employment culture proved less than compatible.

One participant described the traditional Fogo Island working culture as “very unionized, very seasonal. So even the whole idea of work twelve months a year is different”. Another interviewee explained,

People fished, fishing season ended, people drew unemployment...you’re used to having the winter off, and you’re used to, you know, cutting your fire wood at your convenience – you’re a year ahead. You have a cabin in the woods, that’s a big part of your winter

recreation, your kids love it. So you get to spend all this time with your family, with your children, that workers don't get to do.

Participants who had previous experience in the hospitality industry described it as highly demanding, fast-paced, and all-consuming: "You work in the hospitality business – it's not like you have a separate set of friends or you're going here and you're going there, you're working...you sacrifice a lot being in this business and your time, basically, isn't your own". The distinct contrast in the conditions and demands of commercial hospitality compared to traditional fishing culture proved unappealing to many members of the local labour market which resulted in a PBE tension for Shorefast.

Despite the creation of jobs, Shorefast ran into challenges around finding and retaining some members of their local workforce. One participant reflected, "finding people to come to the island is one thing. Finding people who are on the island and want to get into this type of business and with that type of commitment is another thing". Among some local employees initially attracted to the industry, long-term retention proved difficult. Several managers listed helping local employees adjust to the hospitality industry as one of the ongoing challenges to their day-to-day operations, "[some of the local employees] worked in the fish plant in Fogo and gave it up to try something new...they didn't realize what they were signing up for. We tried to tell them up front, you know, it's going to be a tough experience, challenging job, hard work, stressful environment". According to a few participants, the ongoing tension between the working cultures of the hospitality and fishing industries was Shorefast's biggest barrier to employee attraction and retention.

The tension between the fishing culture and hospitality culture at Shorefast was also heightened by the extensive training required by each new local hire. The majority of local

Shorefast employees worked for the Fogo Island Inn and most had never before worked in the hospitality industry. “When you get ninety percent of the people here never worked in a hotel before, I mean they don’t know what they don’t know. And they have to know what they don’t know because their guests coming in do know what they want”, described one interviewee. The time requirement and expense of the training was notable, and the risk of turnover impacted the organization’s operations. Thus, the cost to train such a large team of people to work at a five-star tourist destination was substantial, as one manager recalled expressing to new hires, “we can’t afford for you to come here, and for us to invest in you, and for you to bail”.

Shorefast’s employment of local people was critical to the success of the project. On the one hand, local employment was needed to boost the local economy and bring financial independence to the local working people, and on the other hand, the local sense of hospitality was a key component of the commercial hospitality experience. However, despite the need for new employment opportunities on Fogo Island and the natural sense of hospitality amongst its people, the demands of the commercial hospitality industry clashed with the local fishing culture resulting in ongoing attraction, retention, and training challenges for the organization. In this way the relationship between the employment cultures of the traditional fishing industry and non-traditional hospitality industry posed a PBE tension for Shorefast.

Remote Geographic Location versus Isolated Geographic Location

Shorefast’s third PBE tension pertained to the physical location of Fogo Island. As an island off an island in the middle of the North Atlantic, the remoteness of Fogo Island was simultaneously a source of Shorefast’s competitive advantage and a potential threat to its future success.

According to a number of interviewees, the remoteness of Fogo Island posed an important threat to Shorefast's success. "You're on an island, it's different. It has those challenges that land-locked destinations don't", commented one participant. The weather and the Fogo Island ferry service were the two most frequently reported challenges to Shorefast's operations. One participant noted the difficulty of handling the logistics of tourism on Fogo Island, "The remoteness [is the biggest challenge]. It all goes back to location and getting people and things here, I mean with the ferry, flights, delays, and the ice". Another interviewee described the challenge and risk from a visitor perspective, "It's one of the biggest challenges to the Inn itself, transportation... clientele from around the world are looking at how long it takes to come here, certainly impacts it. If I'm coming anywhere from the U.S. and I have to stay overnight in Gander, that may deter [me] from coming to the Fogo Island Inn".

However, despite the accessibility challenges Fogo Island's remote location caused, it was also one of the greatest sources of appeal to tourists visiting the Fogo Island Inn. Each factor that challenged travel to and from Fogo Island also contributed to the uniqueness of the island's culture, tradition, people, population, community, landscape, wildlife, and climate. One participant described, "People live in Florida, they want to see...ice in the harbor and an iceberg is like, 'Whoa'. You know, you don't get that in Manhattan. You have to come here". In this way, the same element of geographic remoteness both attracted people to Fogo Island and made it difficult to travel there. One participant shared,

people keep saying to me like 'oh why doesn't Fogo just build a bridge?' and I'm like 'do you know what would happen to Fogo if we actually built a bridge?' then everybody and anybody could come for a drive by on Fogo and that has its risks...people come in, you don't invest in the place, you don't stay, you don't spend money there.

As a small, remote island off the edge of the North American continent, all the elements that made Fogo Island a unique and attractive tourist destination stemmed from the same characteristic that challenged the organization's success. In this way the location of Fogo Island caused a PBE tension for Shorefast between the attractiveness of the remote location for tourists and challenges created from the accessibility issues of the island's isolation.

Organizational Success versus Business Community Success

As a PBE, Shorefast defined its organizational success by the health and wellbeing of all the place-based elements of Fogo Island. The viability of the local business community was a major factor in that success, as the ability for the community to financially sustain itself in the global market was a prerequisite to the preservation of the social, natural, material environments and meaning of place on Fogo Island. In an effort to help local businesses attain long-term success, Shorefast invested significant financial and human resources into developing the capacity of local business owners through a buy-local policy and ongoing development of supplier relations. Although the improvement of local businesses benefitted Shorefast's place-based success, it also posed financial and time-based challenges to the organization's ability to deliver its own product offering, a quality tourism experience. In this way, Shorefast's commitment to building local business capacity on Fogo Island was simultaneously a benefit and a hindrance to the success of the organization, and thus marked a PBE tension.

Shorefast's first initiative to build local business capacity on Fogo Island was the effecting of a strict, organization-wide 'buy local' policy. As one participant summarized: "we buy to create jobs... if I can buy it on Fogo Island, you have to buy it on Fogo Island". The Shorefast approach to local purchasing was described by several participants as 'counter-

intuitive' to usual business decision making processes. Instead of demanding more and more product for less and less money, as business norms dictate, Shorefast placed the welfare of the local business community on par with – and in some cases above, the financial benefits of the organization. One interviewee shared, “in all other business it’s like... ‘how do we hammer down our supplying cost? How do we hammer down supply costs?’, whereas we don’t do that”. Another participant explained, “I kind of have to now think of it in a different way when I make my business decisions. It’s no longer, you know, how it affects the Inn directly and affects the bottom line of the Inn, but what impact it has on the community”. A popular example of Shorefast’s counter-intuitive purchasing was the ongoing consumption of gasoline for its vehicles. As one participant explained, “The cheapest gas is after you get off the ferry when you get to Gander”. But Shorefast was resolute in its decision to purchase only from Fogo Island gas stations, “You will be fired if you fill up somewhere not on this island unless you are about to break down... Because if we don’t support our local business that serve gas, we’re not going to have them”, explained the participant.

Although the buy-local policy may have been counter-intuitive to the success of traditional business, it was essential for Shorefast. As a PBE, Shorefast’s organizational wellbeing was intertwined with the success of place, which included the local business community. If the Fogo Island business community failed, Shorefast, too, would face hardship. However, paying premiums to support local products posed challenges to the organization’s bottom line. As a new business itself, the economic strain of inflated local prices made it significantly more difficult for Shorefast to successfully operate its tourism business; and as the second largest employer on Fogo Island, the failure of Shorefast would also hurt the community. As one manager reiterated, "One part of the argument is if we can't make a profit here then...the

impact on the people here at the Inn is gonna be, you know, catastrophic". The challenge for Shorefast was balancing community success with a healthy bottom line as an organization. "It's difficult" continued the manager.

Shorefast's second local business initiative involved investing time and expertise into the advancement of Fogo Island-based suppliers. As a traditional fishing community, many local business owners lacked the expertise to supply the high-quality products Shorefast required to satisfy the demands of its five-star tourism destination. But, instead of purchasing ready-made quality products from off the island or venturing to create additional products in house, in several cases, Shorefast opted to spend the time and money helping local business owners to produce the required product. The sourcing of local produce by the Fogo Island Inn Kitchen provides one such example. "We've got a relationship with a few growers on the island and it's been developing", noted one team member, "[The chef's] been working a lot with them". Members of the kitchen team noted a significant amount of their time spent on sourcing and getting the local food to the Inn, "That's eighty-percent of the job right there is just trying to find products that's local or ethically sourced from a good place and getting it here". Food supplied on Fogo Island was grown by non-commercial 'hobby' farmers rather than professionally-operated commercial farms, thus, lack of efficiencies also challenged the source-local initiative, "it's on their schedule and at their leisure...they're also lovely guys and they grow really nice stuff, but it's not - they're not organized".

While investing money and skills into local business owners helped Shorefast achieve place-based wellness, it also, at times, impeded the organization's ability to deliver a five-star quality tourism experience. If Shorefast's geotourism initiatives failed so too could the local businesses that depended on them. As one participant summarized,

if for some reason that grower cannot grow anymore, ultimately he's going to have to move off the island to make a living and this is why this whole project started, to keep him on the island, for him to sustain himself and his family, and to build the community and keep the culture. So that's the big picture.

In this way the tension between the need to build local business success on Fogo Island and the organization's own ability to be successful represented an important PBE tension for Shorefast.

Operational Investment versus Cultural Asset Investment

Investment in the preservation of cultural buildings versus investment in the development of a sustainable tourism operations on Fogo Island presented the fourth PBE tension for the Shorefast Foundation. According to interview participants, cultural buildings were those that had been built several generations before and possessed a design and/or function that was rich with place. For Shorefast, investment in cultural buildings mostly included traditional 'salt box' style houses and community churches. As a PBE, Shorefast took on the purchasing and restoration of numerous cultural buildings throughout Fogo Island in an effort to preserve the historic structures and their cultural significance. While some of the buildings were useful within Shorefast's operations, the upfront time and expense required for purchasing and restoration activities detracted from the day-to-day focus and resources needed to build a sustainable geotourism industry and deliver a quality experience to visiting guests. However, leaving cultural buildings to fall or be torn down threatened the loss of an important element of place on Fogo Island; for, as a pivotal element of the geotourism industry, the place-based value lost through those buildings would have also impaired Shorefast's geotourism delivery. Thus the ongoing

decision around the preservation of cultural buildings on Fogo Island caused a complex PBE tension for Shorefast.

A significant part of the Fogo Island culture was rooted in the connection to and memory of past generations. As the spaces in which lives were lived and memories made over the course of family and community life, traditional homes and churches played a significant role in preserving the history of place on Fogo Island. According to one participant, visiting or living in a traditional salt box house on Fogo Island represented “the only way to reach out and hold hands with the people who lived there [before]”. Another interviewee commented, “you can just feel when you’re in an old place and there’s history... You can feel the energy and the spirit and the people who came before”. However, despite the value of old buildings on Fogo Island, many sat empty, purposeless, and in disrepair. Others still were being torn down to build modern structures in their place. As one participant rationalized, “it’s easier to tear down a house and build a new one than try to renovate and restore a hundred-year-old salt box house that hasn’t been lived in in thirty years”. As such, given the decline in economic conditions and outmigration of the local population, the tearing down and abandonment of old homes and churches on Fogo Island had become a common occurrence.

In light of the rich meaning and culture held in physical buildings and traditional architecture, the preservation of Fogo Island’s traditional saltbox homes and community churches became a priority for Shorefast. As one Shorefast employee shared, “Zita didn’t want to see any churches go by the wayside, no matter if they are her denomination or not”, and “she does not want to see another salt box be torn down or fall down”. Said one participant of the number of salt box houses owned by the organization, “I think we’re at fifteen now...and that doesn’t include the churches or the other buildings. So we still have five churches”. Over the

course of their operations, Shorefast bought and restored over a dozen houses throughout Fogo Island. Several they used to house guests, residents, employees, etc., but others still were bought simply to avoid dilapidation. The preservation of churches, too, was a priority for the organization, “on a community level they are such gathering places and they are very important for people”. While Shorefast used a few churches for storage, others remained empty. Despite a lack of purpose for some buildings within the organization’s operations, Shorefast recognized the importance of traditional houses and churches to the resilience of place on Fogo Island and continued buying up and restoring historic properties.

Over the long-term, Shorefast’s goal was greater than preserving a portfolio of traditional buildings on Fogo Island. The real estate initiative was but one step along a path of place preservation through the reinvigoration of local pride in objects that symbolized Fogo Island’s rich sense of tradition and connection to the past. As one participant described, the local connection to place had been “revitalized because of the project”. The participant continued,

Fogo Islanders have a deep love of their ancestors, I think that also has been - because I think it’s given people this opportunity to go ‘Well god, what would my dad have done? How did they do that back then?’ looking at old objects in new ways and realizing wow, they’re actually not gone because we still know what they taught us and having a place to put that has been such a great energy.

As a result of Shorefast’s preservation and restoration initiatives, several participants reported a renewed appreciation for traditional aesthetic throughout the local community. As one interviewee shared, “I tell you that the general consensus from where I sit, is that everybody wants to look good in the traditional way”. Other participants suggested that the growing sense of pride amongst the Fogo Island people was most evident in the growing use of traditional wooden siding on the exterior of local homes, despite the high cost compared to vinyl. “And they

like this, old – the wooded siding, they want the traditional. And fifty years ago it was traditional, but it was nowhere near as expensive as it is now” noted one participant. “Wood is coming back in the community” reported another, “Just people who are saying ‘thank god for that hurricane, blew off all that siding, I’m not putting that back on””.

The preservation of homes and churches throughout Fogo Island, however, posed a resource-based tension for Shorefast, a pull on organizational time, money, and energy. Not only did the buildings pose a substantial upfront purchasing cost, but they also required ongoing investment for renovations, upkeep, maintenance, and cleaning. Further, none of the buildings purchased by Shorefast generated any revenue for the organization. This view was articulated by one participant who said:

"I'd love - every time a building falls down, there's a couple falling down now and it's like 'man, we should really go and try to save those building', but we can't, because if we do, it's going to cost money and it's going to detract us from moving forward and you can't die on that hill. Like it's just picking your battles”.

With a mandate as ambitious as place-based cultural and economic resiliency, the demands for Shorefast's time, money and energy were high. While investing in culturally significant structures was important to Fogo Island's cultural heritage, the initiative was in tension with Shorefast's own viability as well as the opportunity cost of not directing resources to other place-based causes.

Building preservation initiatives was key to Shorefast because traditional homes and churches played a significant role in the preservation of place on Fogo Island which, as a PBE, was critical to Shorefast's overall mission. However, the time and expense of preserving cultural buildings in the community caused a tension for the organization as it reduced the resources available for the building of their core operation, a five-star geotourism experience. Yet,

although the preservation of cultural buildings did not enhance the geotourism experience day-to-day, the unique culture, history and aesthetic of Fogo Island was a big part of Shorefast's product offering, and cultural buildings were key. Thus the preservation of cultural buildings on Fogo Island caused an ongoing PBE tension for Shorefast.

Non-Local Hiring versus Local Hiring

One of the key initiatives that inspired the founding of the Shorefast Foundation was bringing cultural and economic resilience to Fogo Island through the creation of new employment opportunities for local people. Local jobs would allow those Fogo Islanders still living on the island to remain in their homes and communities engulfed in local traditions and culture, thereby sustaining all of the natural, social, material, and meaning-based elements that made Fogo Island a special place. It would also allow Fogo Islanders who had moved away for employment to return, increasing the local population, tax base, school enrolment and overall viability of the island. Thus, Shorefast made local hiring a top priority from the beginning.

However, despite such an initiative, a notable portion of Shorefast positions were filled by non-local people who had moved to Fogo Island from other areas of the country and/or the world. Shorefast actively hired outside the Fogo Island labour market as the local labor pool did not contain the spectrum of specializations needed to successfully launch and operate the organization's projects. While local employment was essential, so too was the success of the project as it would help ensure local employment into the future. However, this success required many key positions to be filled by non-local people. This simultaneous need to hire local and non-local employees represented the sixth PBE tension for the Shorefast Foundation.

On the one hand, the hiring of non-local people aligned well with the Shorefast's place-based revitalization goals. Non-local employees helped increase the population and tax base on Fogo Island bringing extended benefits to the local community. One participant quoted a Shorefast executive saying, "I want Fogo Island to be 6,000 people again, to get there, people have to move here". Additionally, new people brought new, valuable skill-sets to the island, helping to launch initiatives that reconnected the local community to lost and/or dwindling traditions, such as boat building and carpentry. Further, several participants noted that the 'fresh perspective' of non-local employees helped local employees and community members better appreciate the place-based elements of Fogo Island, "I think people knew it was a special place and Fogo Islanders move away and always want to come back here. They feel it's a special spot, but I think it has given [local] people more perspective on how valuable the place is and how much they can appreciate it... [having new people move here] shifts people's thinking a lot".

Despite the community-based benefits of hiring non-locals at Shorefast, place-based tensions persisted. Select non-local employees expressed feeling unwelcomed by a portion of the local community, "it seems like some people don't want us here... I don't think there's been a lot of negative push back individually, I think it's just some people have the notion that it's not good that people are moving here". Other participants noted the general difficulty of fitting into a tight-knit, family-based place as an outsider. One interviewee suggested that centuries of relative isolation from the outside world had created a sense of fear among some local people, and that fear had motivated a sense of hostility among some locals towards newcomers on Fogo Island, "a place that is remote and isolated, there is a fear of the unknown and when it comes to people, people are people".

The hiring of local versus non-local employees at Shorefast not only brought community-based tensions, but tensions also manifested within the organization in terms of tourist experience, employee job security, and the realization of the organizational mandate. First, the hiring of non-local employees could impede Shorefast's delivery of an authentic geotourism experience. The opportunity to meet, get to know, and form relations with local employees at the Fogo Island Inn made up a major element of Shorefast's value proposition. As one interviewee described,

they're connecting with the staff, right away. That happens from, maybe Gander airport. So I think that kind of sets the pace for what comes next. But if you were to read many trip advisor reviews, you will quickly read that the community association with those guests is pretty high up their list.

The hospitable nature, unique accents, and disarming sense of humour of the Fogo Island locals were distinct qualities of place on Fogo Island that made an impact on the guest experience. By hiring staff from outside of Fogo Island, Shorefast lessened the opportunity for encounters between guests and local employees. However, it was the skills and talents of those same non-local employees, architects, designers, marketers, hospitality experts, etc., that enabled Shorefast to design, build and execute the place-based tourist experience in the first place.

Second, the non-local hiring tension was further enhanced by an organizational training mandate that called upon all non-local employees to actively train themselves out of their job. As one participant confirmed, "all that have been hired from away have a very clear mandate that we are supposed to train ourselves out of work, that's been made very clear". The participant continued,

The whole concept is building community level capacity. Well, if we just hire people from away to do, you know, a certain level of work or a certain understanding and we

don't translate that knowledge into people that are embedded there, where that knowledge stays at the community level, then we all fail as senior management.

While the need to improve the local workforce was key to the project's success, it created a sense of job insecurity among some non-local employees which inevitably affected the organization's performance.

Hiring non-local employees also challenged the core of Shorefast's mandate to preserve place on Fogo Island. The very presence of non-local people on Fogo Island inherently changed the composition of the local community thus altering the social, natural, material environments and meaning of place. As one participant remarked, "One of the biggest impacts right away happened from the onset, like artist studios being built, was bringing people from away to Fogo Island...Just having like a dozen people be able to move to Fogo Island...for jobs is a pretty big thing". Shorefast needed the skills and expertise of non-local employees to bring their place-preservation initiatives to fruition but bringing non-local employees into the community resulted in a change to the community composition. Thus, the non-local hiring practice was in tension with Shorefast's place-based preservation goals.

Non-local employees were critical to Shorefast's success; their skill-sets contributed to the growth of the place-based business and by moving to the island, they increased the young population base. However, at the same time, the introduction of non-local employees to Shorefast and the community changed the very nature of place on Fogo Island. This caused a fundamental PBE tension that affected local community members and non-local employees, and brought challenges to Shorefast's short and long term operations.

As a PBE on Fogo Island, Shorefast's geotourism operations led to the manifestation of six PBE tensions: economic capital versus sacred capital, commercial tourism industry culture versus fishing-based employment culture, the appeal of remoteness versus the inconvenience of isolation, organizational success versus business community success, operational investment versus cultural asset investment, and non-local hiring versus local hiring. Each of the six PBE tensions faced by Shorefast grew out of the organization's philosophy of 'new ways with old things'. The operational conflicts arose around efforts to 'change while staying the same', in that changing and staying the same are oppositional concepts, but simultaneously necessary in the creating new ways from old things and ultimately preserving place on Fogo Island.

Ultimately, the very launch of the Shorefast Foundation fundamentally changed 'place' on Fogo Island. However, without Shorefast, Fogo Island faced even greater changes to its natural, social, material environments and sense of place. Had the economic opportunities and population continued to decline they may have faced the risk of having no one left to preserve the local culture, traditions, or way of life. In this way, Shorefast's initiatives to preserve place through economic and cultural resilience helped to protect Fogo Island, while simultaneously challenging multiple long-held norms and realities. The outcome of this in-depth case study was the discovery and exploration of the six manifestations of this new-old PBE tension.

ANALYSIS

The six PBE tensions discussed in the findings manifested from Shorefast's 'new ways with old things' philosophy and they reveal three broad insights into the PBE context: an appreciation of the consistent and simultaneous effect of multiple tensions in the PBE environment, the underlying PBE tension between renewal and preservation of place, and the paradoxical nature of PBE tensions.

The Nature of Tensions in the PBE Environment

Each of the six PBE tensions uncovered through this research can be explored individually throughout various related literatures. The following provides a brief perspective on the background of each tension before moving on to discuss the key insights derived. The relationship between sacred capital and economic capital, for example, has emerged in the work of prominent economist Charles Eisenstein. In his 2011 book, *Sacred Economics*, Eisenstein highlights the challenges of navigating a capital-centric society at a time of widespread, social, environmental and spiritual crises.

In 2002, from a history and anthropology perspective, Macleod reported on the cultural challenges experienced by a Canary Island community transitioning from a traditional fishing industry to tourism in the face of globalization. The tourism literature has explored the tension between the appeal of remoteness and encumbrance of isolation common amongst island economies. In their 2016 article, Stoddart and Graham discuss the varying perceptions of Newfoundland's isolated geography throughout various tourism campaigns and accounts; from romanticized perceptions of remoteness to the negative influence of intervening weather acts.

Tensions between the success of the business and that of the local business community are widely explored throughout the SE literature. For instance, Smith, et. al. (2013) describe a form of SE referred to as ‘work integration’ organizations and survey the exchange of challenges and benefits of SEs helping to enrich the employment capacity of local populations. The urban economic development literature explores the benefits and difficulties of revitalizing neighbourhoods through the restoration of community-based cultural assets. And while Stern and Seifert (2010) provide urban examples of restoration projects with art and culture at their core, they also emphasize the long timelines, high expense and ongoing stakeholder relations involved in such initiatives.

Finally, Rothman’s (1998) explanation of the neo-native concept highlights the tensions that develop around the interactions and benefits distribution of non-local versus local populations in a tourism setting. The cross-disciplinary contexts of the six PBE tensions are a testament to the growing importance of place and the breadth of potential offered through a greater understanding of the PBE tension concept.

The PBE context presented by this research offers a unique perspective on all six tensions as they occurred constantly and simultaneously within a single environment. While each of the tensions have been explored individually across such literatures as mentioned above, previous insights fail to paint a comprehensive picture of the sustainability environment. Where traditionally, organizational tensions were limited to a single relationship between the success of the enterprise and that of a targeted social or environmental cause, for PBEs, the success of the organization is fundamentally tied to all elements of place and their coordinated success, and thus effective for deriving new sustainability insights.

PBE Tension: Renewal of Place versus Preservation of Place

The second insight derived from the Shorefast case study was an overarching tension between renewal of place and preservation of place that was found at the core of each PBE tension. The relationship between each tension and its overarching renewal-preservation elements are demonstrated in Table 1 (see below).

Table 1: The Renewal versus Preservation Tension Underlying Shorefast's 6 PBE Tensions

Tension	Renewal	Preservation
1. Economic Capital versus Sacred Capital	New energy and resources flowing into the organization and broader community spurred by an influx of new economic capital from the geotourism industry	Preservation of the natural environment and local culture through increased awareness, will, and financial capability to protect them from loss and destruction
2. Commercial Tourism Industry Culture versus Fishing-based Employment Culture	New employment opportunities and economic sustainability for local people. A new application of a deep sense of local hospitality, and a new positive perspective on place	Preservation of traditional fishing way of life and the unique qualities it brings to local place via a deepened appreciation among locals, non-locals, and visitors
3. The Appeal of Remoteness versus the Inconvenience of Isolation	A new demand and purpose for transportation infrastructure. A new appreciation for the quiet way of life and community closeness that results from remote living.	Preservation of remoteness and a simple way of life, as well as the natural, cultural, material, and historical elements that stem from it
4. Organizational Success versus Business Community Success	New demands, financial success, skills, partnership and learning opportunities for local businesses.	Preservation of local business, the local population, and the cultural elements that sustain place and the tourism appeal
5. Operational Investment versus Cultural Asset Investment	A new sustainable industry on Fogo Island to bring new human, economic resources, and sense of hope for the future.	Preservation of cultural buildings and the culture, history, traditions, architecture, and connections to past generations they represent
6. Non-Local Hiring versus Local Hiring	New skills, talents and perspectives brought by a new population of non-local employees	Preservation of local jobs for Fogo Island residents which keep them on the island and preserves the local culture and way of life

Upon analysis of Shorefast's six PBE tensions, the renewal-preservation elements of each tension was found to align with the sustainability orientation and place-based rootedness elements; such that renewal efforts echoed sustainability initiatives and preservation activities matched with rootedness ambitions. The renewal of place was found to be the change agent

element of each PBE tension, driven by the generation of new initiatives geared to stimulate the fresh flow of resources to nourish both the place and the organization. The sustainability orientation of each PBE tension was concerned with the balance of place-based wellbeing with business success. Shorefast's renewal initiatives included: the generation of new capital, the introduction of the commercial tourism industry culture, a positive perspective on remoteness, building a successful tourism experience, achieving operational viability, and bringing new people to the organization and Fogo Island.

The preservation component of the PBE tensions that emerged from the data matched closely with the place-rootedness element. Place-based rootedness in the PBE context involved the welfare of all elements of place. The preservation component of each of Shorefast's PBE tensions was the initiative that focused on the wellbeing of all place-based elements on Fogo Island, including the preservation of: sacred capital (nature and culture), the fishing-based employment culture, geographical isolation, business community success, investment in cultural assets, and local employment. Where 'renewal of place' looked to the sustainability of the future and the generation of new resources, 'preservation of place' centered on holding to the past and all the elements of place that had made Fogo Island special and distinct for hundreds of years.

The Interconnectedness of Renewal and Preservation: PBE Tensions as a Paradox

The third insight of this study was the paradoxical nature of the overarching PBE tension, renewal and preservation of place. While the renewal-preservation elements of each of the PBE tensions were, in many respects, distinct, in that the preservation activities strove to keep something the same and renewal efforts implied fundamental change, the two forces were, at the same time, fundamentally interconnected. As the paradox literature advocates, both the tension

and the interrelatedness of the PBE paradox were essential to the sustainability of place on Fogo Island. In this way, the renewal-preservation tension at Shorefast, and all six of the tensions it encompassed, were paradoxical and could be represented by the Taoist yin-yang symbol as shown in Figure 4.

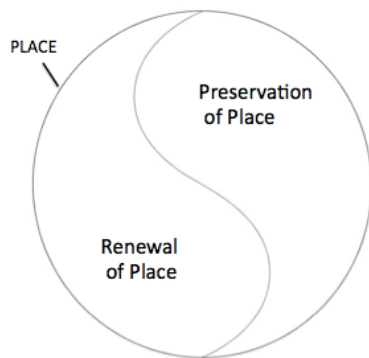


Figure 3: The Paradox of Place-Based Enterprise

The inside division represents the boundary between the two opposing sides of the tension, while the outer boundary, the circle, represents the simultaneous interrelation of the elements. According to Smith and Lewis (2014), the external boundary “also binds and juxtaposes opposing elements and amplifies their paradoxical nature” (p. 23). The Shorefast study reveals that in pursuit of simultaneous renewal and preservation of place, both can – and must be achieved for the sustainability of place on Fogo Island. However, as a paradox, renewal and preservation are, at the same time, conflicting in nature. Thus, the relationship between renewal and preservation for Shorefast presented a fundamental tension that persisted over time.

DISCUSSION & CONCLUSION

The immediate impact of place-based wellness on widespread, enduring sustainability action throughout the world has never been clearer than it is today. Despite definitional variations both across and within academic fields, from sociology to political science, geography to management science, a holistically-defined concept of place is steadily emerging as the key to sustainability efforts. PBEs hold enormous potential for the future of sustainable enterprises. Defined as having a local locus of ownership, place-based embeddedness, and possessing a place-centric social mission, PBEs not only stand to improve the well-being of local places, but may be instrumental in “the success of the broader endeavor of global biophysical and social sustainability” (Shrivastava and Kennelly, 2013, p. 90).

Where in the past the notion of sustainability has revolved mostly around the balance of a conflicting business versus social-environmental need, this study of PBE tensions reveals that place is an effective common denominator for sustainability tensions amongst any two or more elements of social relations, the natural environment, material elements and/or place-based meaning. These four elements of place, of course, encompasses all business and economic-based initiatives for “all organizational actions happen in places” (Shrivastava & Kennelly, 2013, p. 97). Instead of targeting one social or environmental cause, PBE tensions demonstrate that sustainability requires the incorporation of all place-based elements at once and fundamentally ties them to the success of all business.

Using Shorefast as a case study, this research provides an empirical analysis of the PBE environment contributing further insights to the growing role of place in the sustainability literature and three important findings to the PBE literature. The first insight revealed that the

PBE environment is rife with tension. As a critical component of every business, tensions unveil significant insights into the challenges and opportunities an organization faces day-to-day as well as on a strategic level. Although tensions surrounding sacred capital, industry culture, geographic isolation, business community success, cultural asset investment, and local hiring have been explored independently throughout various literatures, the PBE context provides a unique perspective on the effect of all six tensions unfolding consistently and concurrently within an organizational environment. Second, this study illuminated the core PBE tension between place-based renewal and preservation; and the third insight demonstrated the paradoxical nature of PBE tensions.

Organizational research has only just begun to look at the relationship between business and place. While the field has gained increasing attention in recent years, studies have explored the theoretical realm alone, lacking in empirical insights. The most prominent limitation of this research stems from the narrowness of the single-organization based case study approach. However, as an emergent literature, the in-depth, empirical nature of this research provides a useful foundation for future research extending the understanding of PBE tensions and sustainability opportunities, through the paradox lens.

Identifying and understanding PBE paradoxes provides both practical and theoretical opportunities. The simultaneously conflicting and interrelated nature of the renewal-preservation relationship is an indication to managers that PBE tensions may be managed but not resolved. With this recognition comes the opportunity for future research to apply emerging paradox management and decision-making frameworks (Smith, 2014; Smith, et. al., 2013) to the PBE context. In understanding the tensions that face such key organizational forms as PBEs, we

understand more about the future path of the sustainability field as place becomes more and more critical to success of all business and sustainability efforts across all disciplines.

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APPENDIX A: GEOTOURISM CHARTER



Mission Programs

Center for Sustainable Destinations

This global template is designed for nations but can also be adjusted for signature by provinces, states, or smaller jurisdictions, and for endorsement by international organizations.

Geotourism is defined as *tourism that sustains or enhances the geographical character of a place – its environment, culture, aesthetics, heritage, and the well-being of its residents.*

The Geotourism Charter

WHEREAS the geotourism approach is all-inclusive, focusing not only on the environment, but also on the diversity of the cultural, historic, and scenic assets of _____,

WHEREAS the geotourism approach encourages citizens and visitors to get involved rather than remain tourism spectators, and

WHEREAS the geotourism approach helps build a sense of national identity and pride, stressing what is authentic and unique to _____,

THE UNDERSIGNED parties to this Agreement of Intent commit to support these geotourism principles, to sustain and enhance the geographical character of _____—its environment, culture, aesthetics, heritage, and the well-being of its residents:

Integrity of place: Enhance geographical character by developing and improving it in ways distinctive to the locale, reflective of its natural and cultural heritage, so as to encourage market differentiation and cultural pride.

International codes: Adhere to the principles embodied in the World Tourism Organization’s Global Code of Ethics for Tourism and the Principles of the Cultural Tourism Charter established by the International Council on Monuments and Sites (ICOMOS).

Market selectivity: Encourage growth in tourism market segments most likely to appreciate, respect, and disseminate information about the distinctive assets of the locale.

Market diversity: Encourage a full range of appropriate food and lodging facilities, so as to appeal to the entire demographic spectrum of the geotourism market and so maximize economic resiliency over both the short and long term.

Tourist satisfaction: Ensure that satisfied, excited geotourists bring new vacation stories home and send friends off to experience the same thing, thus providing continuing demand for the destination.

Community involvement: Base tourism on community resources to the extent possible, encouraging local small businesses and civic groups to build partnerships to promote and provide a distinctive, honest visitor experience and market their locales effectively. Help businesses develop approaches to tourism that build on the area's nature, history and culture, including food and drink, artisanry, performance arts, etc.

Community benefit: Encourage micro- to medium-size enterprises and tourism business strategies that emphasize economic and social benefits to involved communities, especially poverty alleviation, with clear communication of the destination stewardship policies required to maintain those benefits.

Protection and enhancement of destination appeal: Encourage businesses to sustain natural habitats, heritage sites, aesthetic appeal, and local culture. Prevent degradation by keeping volumes of tourists within maximum acceptable limits. Seek business models that can operate profitably within those limits. Use persuasion, incentives, and legal enforcement as needed.

Land use: Anticipate development pressures and apply techniques to prevent undesired overdevelopment and degradation. Contain resort and vacation-home sprawl, especially on coasts and islands, so as to retain a diversity of natural and scenic environments and ensure continued resident access to waterfronts. Encourage major self-contained tourism attractions, such as large-scale theme parks and convention centers unrelated to character of place, to be sited in needier locations with no significant ecological, scenic, or cultural assets.

Conservation of resources: Encourage businesses to minimize water pollution, solid waste, energy consumption, water usage, landscaping chemicals, and overly bright nighttime lighting. Advertise these measures in a way that attracts the large, environmentally sympathetic tourist market.

Planning: Recognize and respect immediate economic needs without sacrificing long-term character and the geotourism potential of the destination. Where tourism attracts in-migration of workers, develop new communities that themselves constitute a destination enhancement. Strive to diversify the economy and limit population influx to sustainable levels. Adopt public strategies for mitigating practices that are incompatible with geotourism and damaging to the image of the destination.

Interactive interpretation: Engage both visitors and hosts in learning about the place. Encourage residents to show off the natural and cultural heritage of their communities, so that tourists gain a richer experience and residents develop pride in their locales.

Evaluation: Establish an evaluation process to be conducted on a regular basis by an independent panel representing all stakeholder interests, and publicize evaluation results.

APPENDIX B: RECRUITMENT EMAIL

Dear <Addressee>:

My name is Jennifer Smith and I am a Masters student in the Faculty of Business Administration at Memorial University of Newfoundland.

The Shorefast Foundation has been selected to take part in a research study looking at the role geotourism in social enterprise. This study is the basis of my academic thesis. I have attached the information and consent form to this email to provide you with more information on the study.

As a member of the leadership team, you have been identified as a person who can help advance research in the area of managing geotourism goals in social enterprises. Your input would make a significant contribution to this study. If you agree, you will participate in a semi-structured interview lasting approximately one hour in length.

Please contact me by email (Jennifer.Smith@mun.ca) or telephone (709-727-1598) with your decision or further questions. If I do not hear from you by <date>, I will contact you directly. Thank you for your consideration.

The proposal for this research has been reviewed by the Interdisciplinary Committee on Ethics in Human Research and found to be in compliance with Memorial University's ethics policy. If you have ethical concerns about the research, such as the way you have been treated or your rights as a participant, you may contact the Chairperson of the ICEHR at icehr@mun.ca or by telephone at 709-864-2861.

Yours sincerely,

Jennifer Smith
MSc Student
Faculty of Business Administration
Memorial University of Newfoundland
St. John's, NL, A1B 3X5

Tel: 709.864.2021
Fax: 709.864.7680
Email: Jennifer.Smith@mun.ca

APPENDIX C: INFORMED CONSENT FORM



Faculty of Business Administration

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APPENDIX C: INFORMED CONSENT FORM

Title: Understanding the Role of Geotourism in a Social Enterprise

Researcher(s): Jennifer Smith, Faculty of Business Administration – jennifer.smith@mun.ca

Supervisor(s): Dr. Natalie Slawinski, Faculty of Business Administration – nslawinski@mun.ca

You are invited to take part in a research project entitled “Understanding the Role of Geotourism in a Social Enterprise”

This form is part of the process of informed consent. Its purpose is to give you a basic understanding of what the research is about and what your participation will involve. It also describes your right to withdraw from the study. In order to decide whether you wish to participate in this research study, you should understand enough about its risks and benefits to be able to make an informed decision. This is the informed consent process. Please take time to read this carefully and to understand the information given to you. Contact the researcher, Jennifer Smith, if you have any questions about the study or would like more information before you consent.

About the Study

My name is Jennifer Smith; I am a second year Masters student within the Faculty of Business Administration. As part of my thesis I am conducting research under the supervision of Dr. Natalie Slawinski. The goal of my research is to understand the role of geotourism at Shorefast. I am requesting the opportunity to conduct an in-person, one-on-one interview to learn about your insights and experiences with running and/or participating in geotourism activities within your organization. The interview will run approximately 60 minutes

Your participation in this study is entirely voluntary. If you choose not to take part in this research or if you decide to withdraw from the research once it has started, there will be no negative consequences for you, now or in the future. After the conclusion of the interview, you may withdraw your interview at any time prior to January 1, 2016 by contacting me at Jennifer.Smith@mun.ca. All data from withdrawn interviews will be deleted.

Possible Benefits & Risks

By understanding the role of geotourism within Shorefast, I hope to help the organization improve its overall performance by providing insight into recurring challenges and opportunities and how they might be best managed. In terms of academic research, it is expected that this project will advance knowledge of geotourism within social enterprises. It will also advance organizations research by developing a process model of ‘how’ challenges and opportunities are managed.

If at any point during the interview you feel a question or the interview process is upsetting or poses a risk to your person, job or reputation, please inform me immediately. The question may be skipped or the interview terminated, as you desire.

Confidentiality & Anonymity

The ethical duty of confidentiality includes safeguarding participants’ identities, personal information, and data from unauthorized access, use, or disclosure. All of your data will be stored on a single, password protected computer within password-protected documents and/or programs where possible. Any data that is in paper form will be scanned and stored electronically and the paper version will be shredded.

Anonymity refers to protecting participants' identifying characteristics, such as name or description of physical appearance. All participants have the option to remain anonymous in the research and every reasonable effort will be made to ensure anonymity. It is important to note, however, that the specialization of your role, the location of the interview on Shorefast premises and the high visibility of the organization within a small community will likely pose some limitations to anonymity. Your words will not be cited in any written work nor will you be identified in any reports or publications without your explicit permission.

Data Recording, Storage, Reporting & Access

An audio recorder will be used to record interviews for data collection purposes only. Recordings will not be used in any reports or publications. All data will be stored electronically on a password-protected computer accessible only to the researcher and her supervisor. Data will be kept for five years, the minimum period of time required by Memorial University's policy on Integrity in Scholarly Research. Following the five-year period, all data will be permanently deleted from the computer.

The results of this study will be published in a thesis and made publically available at the QEII library. Reporting will only include aggregated and/or summarized form direct quotations. Personally identifying information will not be included without express permission of the participant. Participants can access the study results by contacting the researcher at Jennifer.Smith@mun.ca.

Questions

You are welcome to ask questions at any time before, during, or after your participation in this research. If you would like more information about this study, please contact: Jennifer Smith at Jennifer.Smith@mun.ca or Natalie Slawinski at nslawinski@mun.ca.

The proposal for this research has been reviewed by the Interdisciplinary Committee on Ethics in Human Research and found to be in compliance with Memorial University's ethics policy. If you have ethical concerns about the research, such as the way you have been treated or your rights as a participant, you may contact the Chairperson of the ICEHR at icehr@mun.ca or by telephone at 709-864-2861.

Consent:

Your signature on this form means that:

- You have read the information about the research.
- You have been able to ask questions about this study.
- You are satisfied with the answers to all your questions.
- You understand what the study is about and what you will be doing.
- You understand that you are free to withdraw participation in the study without having to give a reason, and that doing so will not affect you now or in the future.
- You understand that if you choose to end participation **during** data collection, any data collected from you up to that point will be deleted.
- You understand that if you choose to withdraw **after** data collection has ended, your data can be removed from the study up to January 1, 2016.

I agree to be audio-recorded	Yes	No
I agree to the use of direct quotations	Yes	No
I allow my name to be identified in any publications resulting from this study	Yes	No
I wish to receive an electronic copy of the final report?	Yes	No

By signing this form, you do not give up your legal rights and do not release the researchers from their professional responsibilities.

Your signature confirms:

- I have read what this study is about and understood the risks and benefits. I have had adequate time to think about this and had the opportunity to ask questions and my questions have been answered.
- I agree to participate in the research project understanding the risks and contributions of my participation, that my participation is voluntary, and that I may end my participation.
- A copy of this Informed Consent Form has been given to me for my records.

Signature of participant

Date

Researcher's Signature:

I have explained this study to the best of my ability. I invited questions and gave answers. I believe that the participant fully understands what is involved in being in the study, any potential risks of the study and that he or she has freely chosen to be in the study.

Signature of Principal Investigator

Date