

Why organizations join voluntary sustainable tourism associations:

Implications for membership and sustainability monitoring systems

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Abstract

With the use of institutional theory, we study why organizations join a voluntary sustainable tourism association and how the organization-association dynamics change over time. We find a disconnection between the joining and monitoring motivations for the association and its members that leads to conflicting forces and confusion, resulting in goal misalignment and loss of monitoring data. Voluntary associations need to accommodate for organizations need of social identity, the desire to learn from each other and the sense of belonging from membership (mimetic forces), with the desire to institutionalise the members to behave in increasingly standardised way (normative and eventually coercive forces).

Keywords: accommodation, conservation, industry association, institutional theory, monitoring, sustainability

Introduction

Most research into sustainable tourism monitoring systems and indicator selection is at an organisation or destination level (McCool et al, 2001; UNWTO, 2004; Miller and Twining-Ward, 2005; European Commission, 2016), however more effort is required to study how institutional relations influence organizational behaviour, particularly surrounding participatory approaches (Roberts and Tribe, 2008). Instead of trying to tackle problems at the firm level, this article proposes examining the role of voluntary industry associations to create membership norms that promote pro-sustainable behaviour.

Institutional theory provides a rich framework for understanding the roles and ways that organizations interact with each other within an institutional field (DiMaggio and Powell, 1983; Scott, 1995).

Institutional theory has defined tourism institutional fields geographically (Rawlence, 2010; Lavandoski et al, 2016), and applied to study industry associations where membership is a de facto requirement to trade (Font et al, 2019, van Wijk et al, 2013), but not to genuinely voluntary membership associations. This paper fills this gap in the literature by examining a voluntary sustainable tourism association that supports members globally. It investigates the reasons why businesses join voluntary associations, particularly ones that support sustainability goals, and how different members respond to institutional

requirements in order to belong to the association, while resisting other pressures that impact on their organization. The study shows the potential for institutional entrepreneurship and theorisation of sustainability practices within a forming and continuously evolving institutional field such as a voluntary membership association.

Literature Review

Institutional fields shape the directions and actions that organizations must take in order to gain legitimacy to operate, that is, they define the values and norms as well as the modus operandi that allows organizations to engage with customers, suppliers, peers and any other stakeholder (Greenwood et al, 2002; Chizema and Buck, 2006; Campbell, 2007; Buchanan and Marques, 2018). Institutional researchers believe external institutions construct and interpenetrate the organization in its entirety (Zucker, 1987; DiMaggio and Powell, 1983; Meyer and Rowan, 1991). Cultural definitions determine how the organization is built, how it is run, and, simultaneously, how it is understood and evaluated. Legitimacy is something that almost every organization desires and, in the context of some fields, can be imperative to a organizational survival (Suchman, 1995). Legitimacy plays a key role in allowing organizations to access critical resources, such as technology, economic and social capital, markets, partners, and customers (Zucker, 1987; Aldrich and Fiol, 1994). Dacin et al (2007) argue that small firms have even a greater need to obtain legitimacy compared to the large organisations whose past performance provides legitimacy and access to resources for them.

Organizations gain legitimacy by responding to institutional pressures. Coercive isomorphism results from both formal and informal pressures exerted on organizations by others that they depend on and/or the cultural expectations from the societies in which both parties operate. This can range from soft socio-cultural preferences to government mandated laws and regulations. Mimetic isomorphism occurs when the industry is following a few dominant actors and other enterprises copy the practices of these dominant organizations. This is often done by firms applying best-practices of industry leaders. Lastly, normative isomorphism occurs when an industry undergoes professionalization, here defined as the collective struggle of members of an occupation to define the conditions and methods of their work. Institutions also lend themselves to being purveyors of legitimacy, often through normalizing processes (DiMaggio and Powell, 1983; Scott, 1995; Suchman, 1995).

Institutional theory provides a rich framework for understanding the roles that associations, understood as institutional fields, play in influencing actions of their members. The more institutionally organized a field is the greater the affect that professional organizations, as purveyors of legitimacy, have over the industry. This can be carried out through the shaping of industry discourses (Scott, 1995; Greenwood et

al, 2002), the ways in which firms interact with each other internationally (Chizema and Buck, 2006; Buchanan and Marques, 2018), and the ways in which firms are expected to develop internally (Lavandoski et al, 2016). Industry associations have been regarded as important institutional actors in industries, markets and organizational fields (Barley, 2010; Rajwani et al, 2015). They have been found to co-define and enforce industry norms (Galvin, 2002; Lenox & Nash, 2003; Bailey & Rupp, 2006; Spillman, 2012), diffuse innovations (Watkins et al., 2015) and defend members from external pressures (Barley, 2010; Maguire & Hardy, 2009; Vermeulen, Büch & Greenwood, 2007).

An organization's interest in joining a strategic alliance or industry association to gain legitimacy increases if some or all of the following criteria are present (Dacin et al, 2007): the organization or field is closely monitored by institutional constituents; the organization depends on a socially responsible image for success; the organization engages in activities or produces outputs that are highly visible and controversial; and the organization lacks a socially responsible image. All of these fields apply to tourism firms, especially if they are marketing themselves as 'sustainable', 'eco-friendly', or other similar industry buzzwords.

So how does this play out on-the-ground for organizations? Lavandoski et al (2016) looked into how the institutional environment exerts pressure on wineries to develop wine tourism products in order to establish their legitimacy within the industry. They found that the prominent wine route organization and the national tourism entity were exerting normative and coercive pressures in the form of specific social requirements and legal regulations for the wine tourism products in wineries. These include, for example, the wine tourism guide for companies, the National Strategic Plan for Tourism, licensing for tourist activities in wineries, and the European Paper on Wine Tourism in the European scope. They also looked at the mimetic pressures that dominant firms had on the industry. What their analysis showed is that normative forces invoked the most pressure on firms, followed by mimetic and lastly coercive pressures in shaping the industry for these particular circumstances. This highlights North's view that "...although formal rules may change overnight as the result of political and judicial decisions, informal constraints embodied in customs, culture, traditions and codes of conduct are much more impervious to deliberate policies" (1990:6).

One prominent normalizing pressure is the development and implementation of monitoring systems. Monitoring systems are widely discussed and contested in the tourism literature (UNWTO, 2004; Miller and Twining-Ward, 2005; Roberts and Tribe, 2008; Torres-Delgado and Saarinen 2014). What different systems have in common is the involvement of stakeholders in the definition of context-specific lists of management and performance indicators, the setting of acceptable level benchmarks for the indicators,

the advice on how to collect data, the monitoring to identify differences between the current situation and acceptable levels of indicators, and the requirement of action plans to address negative impacts.

The overarching purpose of indicators is to facilitate the assessment of tourism policies and practices, measuring sectoral performance and finding the correct path to developmental goals (Crabtree and Bayfield, 1998; Valentin and Spangenberg, 2000; Gahin et al, 2003; Castellani and Sala, 2010). They also support a secondary function of communicating industry knowledges that allow us to better understand the tourism phenomena with spatial contexts (Roberts and Tribe, 2008; Blancas et al, 2010). Because a monitoring system can only prove what it can measure, indicators become the basis for evaluation and can affect the legitimacy of the monitoring system over-all. While ethical stances towards sustainability may be attractive to a firm due to their extrinsic worth in many societies (Miller and Twinning-Ward, 2005), research has shown that it's not so much the carrot but the stick of tarnishing their reputation in the industry that really drives firms to adopt socially and environmentally conscious practices (Miller, 2001). It's this 'proof of efforts made' that establishes a legitimizing process for both the organization and the monitoring association to the industry at large (Miller and Twinning-Ward, 2005).

Case study

The definition of a field is by some extent subjective to the ones doing the investigation (Greenwood, et al, 2002; Scott and Meyer, 1991; van Wijk et al, 2013). Following Buchanan and Marques' (2018) study on associations, this research will look at the interactions of one particular association, in this case The Long Run (TLR), a small membership organization that provides a platform to connect and guide their members to harness the potential of nature-based enterprises, particularly in the realm of eco-tourism (The Long Run, 2018). TLR, formerly an initiative of the Zeitz Foundation, became an independent not-for-profit organization in 2015. There are two increasingly rigorous tiers of membership: Long Run Fellow Members, and Global Ecosphere Retreats® (GER). GER is considered to be of the highest sustainability standard and was officially recognized by the Global Sustainability Tourism Council (GSTC) in 2015 (TLR, 2015a; GSTC, 2015). There are also affiliate members who may or may not be directly part of the tourism industry but provide support to the association and its members. Currently there are 21 fellow members, 10 GER members and 21 affiliate members all around the world (TLR, 2018).

TLR was chosen as a case study for several reasons: Firstly, because their membership base is world-wide, it was hoped that the insights obtained would be applicable to a wider range of associations than institutions that are entrenched in a single geo-political region. Secondly, because TLR is a voluntary association, this provided a different angle than the majority of the literature surrounding other trade

associations, where membership is typically involuntary either due to legal requirements or strong socio-cultural norms (e.g. Buchanan and Marques, 2018; Lavandoski et al, 2016; Spillman, 2012). Lastly, because TLR was in the midst of updating their current monitoring system, this provided an opening for the researcher to engage with existing members and the association about the validity of different aspects of the monitoring system and supply feedback for shaping the new system.

All GER members seek to operate economically viable businesses where all areas of sustainability are considered in a balanced and holistic way. This is represented in TLR's 4C approach: Conservation, Community, Culture, and Commerce. All four areas are integral to membership status and every GER member must prove annually that they are adhering to GER principals. One of the ways in which this is supported is through The Long Run Collective Impact Application, a data reporting method for members to report to TLR. Each member is expected to submit their data annually, ranging from the number of acres they conserve and the type of habitats and species protected, their environmental footprint, and the number people who benefit from their community projects, to how being part of TLR influences and conduces members to continuously improve their impacts (TLR, 2015b). Thus, organizations prove 'efforts made' (Miller and Twinning-Ward, 2005) by providing the data from indicators in the areas that they are being certified in by the association. The association then assesses the data against their criteria, which they in turn have to justify the criteria's relevancy, and certification is either bestowed or denied to the organization.

Methodology

Interviews were selected as the primary form of data collection because of i) the potentially rich yield and relatively low economic and time costs when compared to other methods (Creswell, 2007; Silverman, 2006), particularly when using Skype (Hanna, 2012) to accommodate the geographical spread of the subject and the travel limitations of the researcher, and because of ii) their user-friendliness in capturing data from interviewees who may not necessarily speak the same primary language as the researcher (Marschan-Piekkari and Reis, 2004). Open-ended and flexible questions are more likely to get a considered response and therefore provide better interpretations of events, understandings, experiences, and opinions than other methods (Silverman, 2006), as proven in an institutional theory study of industry associations (Nordqvist, Picard & Pesämaa, 2010).

The interview schedule followed three main areas of inquiry: i) the organization's reasons for joining the association and the institutional forces in the field (Dacin et al, 2007; DiMaggio and Powell, 1983; Scott, 1995), to understand the pressure of different forces that organizations face and the roles that firms, associations, and institutions play in shaping the tourism industry, including legitimacy; ii) their thoughts

in connection to the TLR's Collective Impact Monitoring Application following the 'carrot and stick approach' of sustainability monitoring systems by Miller and Twinning-Ward's (2005) in relation to the organization's operations and sustainability strategies as well as association benchmarking, and iii) what their organizations think is important in terms of sustainability, indicators, and organizational fit within the association, based on Chen's (2005) program evaluation points regarding outputs and outcomes of a system. This section also tries to 'close the feedback loop' by getting stakeholder input into the monitoring system in order to strike a balance of input up and down the stakeholder ladder (Torres-Delgado & Saarinen 2014). Here is when the conversation is really opened up to the interviewee to delve into the specific needs/wants of their organization, how they fit into the association, and how monitoring helps or hinders their individual approaches to sustainability.

Data was collected by interviewing key informants. These key informants were picked because they exhibit certain expertise and positions in the organizations that would give them insight into these decisions and the forces behind them (Nordqvist et al, 2010). The primary informants in the association were directors or department heads, while in the organizations they were senior managers or owners. Interviewees were given copies of the interview schedule beforehand in order to give them time to formulate meaningful responses and to ease the flow of the interview process, as well as research ethics approval and consent forms. Interviews lasted 30-45 minutes on average and were always conducted by the lead author. The interviews were semi-structured, with a predetermined interview schedule, but there was time for interviewees to expand on their views and talk about areas that they felt were important for their organizations. Acknowledging the interviewer-respondent interaction of constructivism, it was also important to build rapport with each interviewee through the exchange of emails before the interviews themselves took place. The fact that the lead author had a relationship with TLR made room for rapport building.

Twelve individuals were interviewed: two individuals from TLR head office, two affiliate members, six fellow members, and two GER members. The names of individuals and organizations were anonymized to protect the privacy of the interviewee, but parties were coded in regard to similarities in their organizational traits: TLR Head Office (T1 and T2), Affiliate organization (A1 and A2), small/family-run organizations (S1-S3), medium-sized organizations (M1-M4), and one large/corporate organization (L1). All the interviews were recorded and then transcribed to paper copies for analysis and coding, to categorizing the text transcribed to establish a thematic framework (Gibbs, 2007) to i) retrieve all the text coded with the same label to combine passages that are all examples of the same phenomenon in order to structure the data; and ii) to use the list of hierarchical codes to examine further kinds of analytic questions, such as relationships between the codes and case-by-case comparisons. Ritchie, Spencer and

OConnor's (2003) template for concept-driven framework analysis was applied to this data set because of its fit with our study's institutional theory focus, whereby key thematic ideas are taken from the literature and the transcripts as a foundation in which to lay the theoretical coding.

Results

The results are here organized in what could be seen to be a chronological order, starting with i) the reasons for organizations to join forces under the umbrella of an association, ii) mimetic isomorphism from organizations learning from each other within the association, iii) how normalization isomorphism brings about a stage of institutional maturity, stagnation and resistance, iv) and how the institution can promote compliance to tackle resistance through coercive isomorphism.

Joining Forces

There is a variety of motivations and benefits that members can enjoy by belonging to an industry association: From access to resources made available to members, some of which are especially valuable for smaller companies such as industry data, legal and other technical guidance documents; newsletters showcasing member successes and ideas; networking opportunities through members meetings, conferences, and other activities; and a reputational advantage beyond the organization's normal sphere of influence (Perry, 2012). TLR embraces this role actively and provides a considerable number of opportunities for members to engage with across a range of mediums such as three to four days annual meetings, regional retreats, private Facebook groups, members visitations to other destinations within the TLR network, and staff exchanges. It also provides resources through its online knowledge centre, member-led webinars, and private on line and on-site support.

Our results show members recognised different motivations to join a voluntary association which can be grouped into three main categories: support, ethos overlap, and legitimacy. Support was the most common joining force mentioned by participants as this allowed them to create a network of similarly minded individuals that can share best practices regarding sustainability, business, and/or technology:

“...there's the sharing of knowledge and experience. Like looking at TLR, you can really accelerate a lot and you don't need to re-invent the wheel. There is no point doing something on your own that someone else has done already.” (T1);

“It is also great to be able to share problems and gain information from some of the other members from all over the world. It really provides a huge insight and fix some of the problems we might encounter. Sharing knowledge is huge (M2).

It also creates an ideological support network to keep organizations inspired to continue their sustainability goals and makes them feel like they are not alone in their struggles. This is especially important for organizations who may be geographically or ideologically isolated from other similar tourism operations:

...people like joining associations and clubs because they can achieve much more working together and also gives them a sense of belonging to a broader community and not doing things on your own, which can be quite disconcerting. Especially if you are a remote small operator (T1).

Whereas technological and ideological support is obviously a substantial driving factor for these organizations, some also had more pragmatic drivers in the form of marketing. Marketing is a huge cost for many independent organizations, so being able to associate themselves with other similar organizations can allow them to share some of this burden: “Marketing takes a long time, it eats your life frankly, and if you’re an independent it’s very expensive to go to trade shows and stuff. So being together it’s raising awareness and giving a platform for people to market themselves” (T1); “We joined mostly for marketing purposes because you want some payback for the time and money you invest into the associations” (S3). It also allows organizations to reach customers who are looking for a particular kind of tourism experience: “...mostly for marketing purposes as lots of people search ranch holidays and stuff so it’s a way to reach our customers. (...) I knew some of the GER lodges already and knew they were quality locations and wanted to set our self apart from other ranches.” (S1). By joining an association that already has an established base of members, especially if membership is based around a certain criterion that people are looking for, like ranch holidays or eco-lodges, organizations hope to piggyback off the successful marketing campaigns of these other organizations to greatly reduce their marketing expenses and efforts (Déjean, Gond & Leca, 2004). In this case, the institutionalization power of the association comes from the functional challenges that organizations face, the resources the association provides and the desire of managers to improve the effectiveness of their organizations (DiMaggio and Powell, 1983) expanding their marketing options.

The second most prominent driving force for joining a voluntary association such as TLR can best be described as a strong ethos overlap between prominent decision-makers in the organizations and that of the association itself. These include themes such as environmental protection and conservation (S1, S2, S3, M1, M2, L1, T1, T2, and A2), engagement and advocacy in the industry through the association (S1, S2, M3, T1, A1 and A2), and the drive to be a trendsetter within the industry to inspire change (S1, M1, M3, and A1). By engaging in these activities through an association, the organizations reduce the uncertainty linked to the new activity (Déjean et al, 2004) but still get to operate in accordance with their

own moral or internal drivers and their need to influence the industry as a whole: “We joined these associations because we identify ourselves with their mission and objectives both on a personal level as well as a professional level. We wish to contribute and be part of a global movement that is aligned to make this a better world for both present as well as future generations.” (S2).

Joining associations like TLR also allow the organizations some degree of freedom to influence their industry. These drivers can also be accentuated when working with an association as this can create a unified front and power hub for these otherwise individual actors: “At the broad level, I think people join associations to gain knowledge and power. Power as in a united voice.” (T1); “Associations are a vital part of the sustainable tourism industry because they help independent tourism organizations learn how to better influence people to travel to and throughout any specific destination, increase the economic benefits from tourism, and help foster a sustainable tourism industry.” (S2).

Along with the need of technical and marketing support to overcome performance challenges the search for legitimacy was raised by most organizations as a motivation to join the association. These two motivations are coherent with what Meyer and Rowan (1977) identified as the first and second “survival-enhancing outcomes”: resources and legitimacy. This legitimacy is often exercised through certification schemes which can allow members to show their commitment to the causes they stand for: “...it shows our commitment to be a responsible business and being held to a really high standard that TLR holds it members to really shows when we tell our guests or when we use it in marketing or when we advertise it and are proud of it that it really looks good on us and shows that we are really committed to that.” (L1);

For us, I think it helps us stand out and be more credible and differentiate ourselves from our competitors. Now I don't think of that differentiation as being commercially viable yet, we consider it more about good standing, good reputation and quality and not because it will get us more people in beds. I'm not convinced people are booking on that basis, but I do think that in terms of industry, the agents and the consumer, it just adds quality and depth to our reputation (M3).

Legitimacy not only plays a big part on how an organization portrays itself to its clients, but it is also important for keeping their own plans on track: “They (associations) play a big part in making sure either conservation is upheld, or the sustainability aspect is upheld. Because the world is changing at such a fast rate, so just making sure these organizations stay true to their goals and holder other organizations that will join them accountable to what they do.” (T2); “Well after doing the whole vetting process to become GER I can tell you that it adds a whole new level of accountability. I can honestly say that I have not seen, as far as marketing or financial return, a lot of benefits of being part of the association. I have not

had one customer say, hey I found you through the long run or because of TLR I decided to go with you guys. But I still think it's the right thing to do and its moving in the right direction" (S1).

In addition, legitimacy gained from joining an association and getting accredited or some level of certification helps when organizations need to engage with outside parties. One member found it useful when having to negotiate with local authorities: "Credibility is also another strong point. We aren't shy about being part of TLR and it adds credibility when dealing with government or local authorities or whatever. It helps to have another organization to back you up" (S3).

Thus, TLR provided two sources of legitimacy among those depicted by Deephouse and Suchmann (2008): The association itself and the certification scheme. Initially through strategically affiliating to TLR, members use endorsement to procure legitimacy by reflecting cultural alignment or normative support (Scott, 1995) to TLR moral grounds, but also through interconnecting with other members and affiliates which share same values, mimicking those more prominent. Subsequently, by having their plans and actions monitored and assessed against a GSTC-recognized sustainability standard, they can recognise themselves as an accountable, legitimate, organization. The challenges of this process are discussed in the following sections.

Early stages in the association and the application of monitoring: The mimetic effect

The most prominent isomorphic driver when organizations join TLR is mimetic isomorphism. This is because one of the advantages of mimetic behaviours is that it can provide viable solutions for ambiguous problems at relatively little expense to the organization. In order to apply the best practices of industry leaders, or more specifically in this case leaders within the association, organizations need to monitor their impacts for comparative purposes. This is especially true among organizations that are newer to the monitoring process (S1, S2, S3, and M1) as technological or industry uncertainty can be a strong mimetic driver (March and Olsen, 1976).

Monitoring for decision making was a strong motivation for all the medium to large sized organizations surveyed (M1, M2, M3, M4, L1, and A1). These are organizations with monitoring systems already in place and have a developed way of using and disseminating the information within the organization. It also allowed them to situate themselves within the industry and provided a benchmark for comparison to other organizations. This was typically done through periodic reports or annual reviews, with different departments collecting information regarding specific indicators and then compiling it all together for managerial meetings. This facilitated a flow of information throughout the organization that not only allowed for better decision making, but could also change the dynamics of how decisions are made: "During the meetings with the staff and the board we are seeing some big changes because everyone is

bringing data. There is more involvement within the organization, decisions are more flexible and not just top-down approaches” (M4).

Building on the data gained from monitoring for decision making, many organizations also would use the information for marketing or communication purposes (S1, M2, M4, L1, T1, and T2). Both TLR subjects mentioned monitoring as a way to share information within the association to inspire or give their members motivation to not stagnate in their sustainability goals. A few of the members (S1, M2, M4, and L1) also directly mentioned the benefits of monitoring from a marketing perspective so they have facts and figures to promote themselves as destinations and a way to position themselves in the tourism industry. TLR also uses data from the collective impact monitoring platform in their marketing material for the association. While these were the only subjects to have mentioned marketing specifically in the interviews, a survey of all the members’ websites revealed that they use monitoring information for marketing purposes a lot more than was revealed during the interviews. This may have to do with the nature or positions of the candidates interviewed, or they just did not readily make the connection during the interviews. But this survey of the organizations’ websites and marketing material would suggest that monitoring for marketing purposes may be more important than stated in the interviews and could be an avenue for further research.

This type of monitoring and internal sharing was lacking within the smaller organizations, not due to lack of will but typically due to lack of resources, staff, or understanding of the system. As organizations grow, and become more competent in their monitoring, they seem to be able to utilize the data better and can incorporate it more into their decision making. Small organizations seemed to struggle with this because they did not have the time or resources to collect all the necessary data, and even if they had the data, they lacked the expertise to really make sense of it in a way that can positively affect their decision-making capabilities: “Internally we don’t use it too much honestly... just having it in place so we don’t slip back. Maybe looking ahead. I’m not gonna look at these numbers and go oh wow next year I’m gonna reduce these numbers by X. Maybe if I see a spike I’ll say oh, why is that happening and try to do something about it. Maybe we’ll focus on this in the future.” (S1). This is where being part of an association can be particularly useful as they can provide technical assistance and maybe provide some of the resources that smaller organizations just do not have.

Maturity, stagnation and resistance from normalization isomorphism

As organizations grow and mature, both in terms of their business and sustainability goals, what they need from the association changes. Normative isomorphism encompasses the professionalization of organizations (DiMaggio and Powell, 1983) and is exemplified by monitoring for the purposes of

justification and legitimacy (Suchman, 1995). On the justification axis, this force was predominant in subjects who relied on external funding for some of their projects (A1, T1, T2, M4 and L1). They needed to prove to their funders or supporting foundations that the resources they were being provided with were being used appropriately and to their best capacity, and the easiest way to do this was through monitoring: “a lot of our numbers justify things, so we can say that we produced this many fruits and vegetables or eggs or whatever from our farm that justifies that ok we can spend this money to improve the farm” (L1); “If you are a funder or a donator then you don’t wanna hear those subjective things like we are doing a good job, we are making a difference. Well if I’m a donator or funder then I wanna see what impacts are being made and how my money is making a difference. The value is not just for measuring and tracking our progress, but for being able to show those who support us objectively what we are doing and is making a difference so hopefully they will continue” (A1).

Here the data gained from monitoring is both used internally for decision making, but also externally for justification. This adds a new dimension to the monitoring required and the monitoring program may need to be more specific or tailored to appease the justifying body. Because of this, monitoring programs for this purpose may have to be developed on a project-to-project basis. Often this type of monitoring and reporting requires transparency for both the organization and the funder, which is supplemented by organizational legitimacy, the other normative isomorphic driver.

Purveying legitimacy is something that almost every organization desires and in some cases can be detrimental to a organization’s survival (Suchman, 1995). Legitimacy also plays a key role in allowing organizations to access critical resources, such as technology, economic and social capital, markets, partners, and customers (Aldrich and Fiol, 1994; Zucker, 1987). This driver was evident in subjects who were trying to influence matters external to their organization (A1, T1, T2, and L1) and needed facts and figures to prove efforts made to these external bodies: “The point of the data is to give credibility. We are saying that these destinations are leading as sustainable destinations and the scientist in me wants to prove that this is true. It gives substance to what we are saying as an association. That is the key” (T1). These subjects use monitoring to elevate their status in the community and to show that their programs and methods are working to the industry at large, as opposed to justification which is mainly targeted at specific groups within or close to the organization.

Interestingly, normative forces were not overly evident in the small or medium sized organizations for monitoring motivators. This seems to complicate Dacin et al’s (2007) argument that small firms have even a greater need to obtain legitimacy compared to the large organisations whose past performance provides legitimacy and access to resources for them. This may be because the smaller organizations feel

that being part of an association that is already known in the industry is legitimizing enough, or, once again, they just do not have the time or resources to be worrying overtly about forces outside their organization. Once more, this may develop over time as organizations understand the monitoring system more and are able to grow their operations to the point where they will be doing more work in their destination external to just the business aspect. As soon as they start participating more in these types of programs, justification and legitimacy will probably become a greater issue, as external entities become more of a factor in these activities.

Tackling resistance: Coercive isomorphism

Due to the increasing pressures of accountability put on non-profit organizations and associations by their various stakeholders and international bodies, improved transparency and reporting quality is necessary to safeguard their revenue streams and memberships (Benjamin, 2008; Verbruggen, Christiaens & Mills, 2010). In addition to these external forces demanding data, associations also need information regarding their members' activities and efforts to provide support. Due to these drivers, it makes sense that impact monitoring is a requirement for all fellow and GER members of TLR. This is often the first-time smaller firms in TLR have had to systematically monitor their impacts, although many organizations have been subject to coercive assessment before:

Before TLR, no, we didn't really monitor. We didn't have a policy or management program of any kind other than just knowing we were doing the very best to be as good and clean as we could. I'd say that the one exception is that the property itself is under an environmental easement with the [local municipal] Land Trust and we have an evaluation with them every year. So, they would check to see if we are sticking with our environmental easement restrictions but other than that in terms of measuring ourselves or comparing ourselves internationally we didn't do it"(S1).

The medium to large organizations often already have some sort of monitoring in place that they were using for mimetic or normative purposes, as discussed in previous sections, but TLR, due to the coercive forces applied to it, require member organizations to develop a more rigorous monitoring system that can fulfill both the organization's and association's needs. But having a system in place does not necessarily ensure compliance, which is why systematic assessment is key:

As part of the GER process we develop a 5-year plan with targets and so on, so that is our strategy that we measure ourselves. It was adopted in 2014, when we got the GER status, but of course there were issues, like with any organization, that this was pending us doing the work required. So, we'll be assessed in October of this

year against that plan, to see if our GER status continues and to help develop the next 5-year plan. So, there is no other organizational plan for us and we didn't really have one in place before 2014 (M3).

Coercive isomorphism was the strongest monitoring driver derived from these interviews, which is of course due to the mandatory monitoring required to be part of the association. The level of coercive influence on the organizations seemed to depend on the size and capability of the organization before joining TLR. The smaller and some of the medium-sized organizations have been subject to the largest coercive force proportional to their organization due to their limited or non-existent monitoring efforts before joining the association. Larger and more developed medium-sized organizations needed less coercive pressure to create or develop their monitoring system as they often had a system in place for other reasons. Assessment seems to be a more even coercive force as all members have to adhere to the same TLR standard, but this assessment may become more rigorous as the external coercive forces continue to be asserted on the association (Verbruggen et al, 2010).

[Finding an institutionalization balance in voluntary associations: towards a better design of membership monitoring systems](#)

The potential for TLR to manage institutional structures and to institutionalize the monitoring system depends on the context of the association and the resources held to articulate, sponsor and defend it as legitimate (Lawrence, 1999). This work is needed to overcome the most relevant challenges that became very apparent during the interviews: i) the development of the system, ii) its implementation with members, and iii) the use of data from the system.

Although TLR principles are the same for all members, and the association works to encourage interconnectedness, it needs to work to articulate and defend a monitoring system which does not necessarily conform to all of its members to the same extent. Members showcase high levels of diversity, which is common in non-professional associations. They joined for different reasons and operate in areas spread all over the world. They differ in size, experience in recording data, and in applying methodologies to translate data into requested indicators amongst other things. Thus, the development of a system that can be applied to the entire association is extremely difficult and requires a large amount of resources from the association and its members to make sure the indicators are not so vague as to become irrelevant but not so specific that it cannot apply to at least most of its members. It is also important to pick indicators that the members can actually produce data for (Tanguay, Rajaonson & Therrien, 2013), and several members mentioned that some indicators, particularly ones surrounding calculating carbon

emissions or measuring cultural and community efforts, were too difficult and time consuming for them (A1, S1, M3 and M4).

Challenges were also relevant in the implementation of the system. This was most evident in organizations that had never monitored before or were still adapting to their monitoring system (S1, S2, S3, M3 and M4), but still constituted a challenge for all members. For these subjects the most prevalent factor was the time and effort needed to gather the data: “Just doing the legwork and getting it all written down saying this is our house policy is absolutely tedious and is creating challenges” (S1); “Operationally it is a little more tough, obviously it takes a little more time and effort if you are counting things or weighing them and recording and reporting that does feel a little annoying when you have to fill out a spreadsheet instead of just doing something” (L1).

Members also revealed challenges in making use of the information gathered for decision making and did not necessarily know how to incorporate this information into any strategic plans: “I can do the report fine and fill out the spreadsheet but it’s the analysis, like turning that into a project that can be reflected in those numbers for the next 6-12 months is the real challenge I would say.” (L1); “We used to have a big annual report for like four years, but it was very cumbersome and very resource consuming, so we actually scaled that part back for now.” (M4). This is why indicator selection is so important. Indicators specifically, and monitoring systems in general, are most effective if they can actually facilitate decision making (Castellani and Sala, 2010; Gahin et al, 2003;) without losing sight of the overall goal of the system in order to fulfill individual indicators:

So, for three years I’ve been trying to find someone with a pig in town for our food waste. Literally just for TLR I’m like we need to do something about this food waste. I finally found someone in town who’s son is raising a pig so now twice a week we are driving five 5-gallon buckets way the hell out of town to get them to this pig and I’m like what is the green footprint of this, driving a car to drop off a 5-gallon bucket of food, um I’m not sure how I’m doing here but its what’s happening. So, there’s 150 pounds of food waste a week that’s not going in the dump” (S1).

Several subjects also mentioned that it was difficult to get staff to buy into the program and do the extra work to record their actions. If the staff was not involved, the task typically fell back on the owner or senior managers and data was often lost or not fully recorded. TLR’s understanding of the challenges faced by members to implement and make use of the monitoring system can be used to learn how to articulate a system to overcome them developing a monitoring system easy to implement and with

indicators that make sense to the organization but still providing the information needed to the association and internal decision makers (Torres-Delgado & Saarinen, 2014).

Additionally, TLR's understanding of the heterogeneous responsiveness provided by members should be used to theorize in favour of the system explaining why the member should adopt it, what effects it will have and why it is especially needed by the adopter (Strang and Meyer, 1993). It can, for example, theorize by appealing to pragmatic efficiency for those organizations operating in a more competitive market and which can use the GER standard effectively among customers or by appealing to association's moral values and giving it moral legitimacy. All interconnection opportunities provided by TLR will provide mechanisms for the monitoring system to be diffused and embraced by members either by mimicking leaders, by normative mechanisms through conferences and seminars or coercively by social pressure. But if the monitoring system is compelling for members it will allow actors to define rules for the new institutional dynamics and diffusion will be less dependent on social relations (Callon, 1998; Strang and Meyer, 1993).

Conclusions

This paper responded to Roberts and Tribe's (2008) call for further research into participatory approaches involving business owners for developing sustainability monitoring systems. This was conducted through a case study of why tourism organizations join The Long Run (TLR), a voluntary sustainability association that has members all around the world, and the reasons why organizations and associations monitor their impacts. Institutional theory was chosen as the theoretical backdrop for this project as it provided a rich framework for understanding the ways that firms, associations, and institutions interact with each other (DiMaggio and Powell, 1983; Scott, 1995). This project emulates Nordqvist et al's (2010) use of interviewing key informants from the association being studied and its members within a particular industry. In total, twelve subjects were interviewed over Skype. This included two individuals from TLR head office, two affiliate members, six fellow members, and two GER members.

What the interviews revealed is that mimetic isomorphic forces are the most strongly aligned drivers in terms of why organizations join associations and why associations and organizations monitor their impacts. This makes sense because in order to apply the best practices of industry leaders, or more specifically in this case leaders within the association, organizations need to monitor their impacts for comparative purposes. This aligns with previous literature surrounding the application and use of monitoring for mimetic purposes (DiMaggio and Powell, 1983). This is largely due to the ease in which this information can be practically applied, especially when there is technological or industry uncertainty (March and Olsen, 1976). A large portion of the subjects interviewed were already monitoring for these

purposes, and this driver was apparent in all subjects for comparative or marketing purposes. Due to these aligning forces, this meant that the association had to assert a relatively small amount of pressure to effectively incorporate indicators that support these goals into their collective impact monitoring platform.

Conversely, there is a disconnection between why organizations join associations and why they monitor among the normative drivers, which has been noted in the literature (e.g. Lavandoski et al, 2016; North, 1990), but the reasons or drive to monitor, which has been explored by some authors (Callon, 1998; Déjean et al, 2004; Zimmerman and Zeitz, 2002) was lacking in the interviews. This was especially apparent among smaller or newer organizations to join the association. This may be a result of lack of resources or time on the organization's behalf, but it could also be due to a deficiency in education or understanding regarding how monitoring in these areas can help benefit their organizational goals.

Firms need objective guidelines and technical support to implement and make decisions based on a monitoring system to help them achieve the benefits aimed through joining the association making its adoption pay off and reducing the gap between reasons to join and to monitor. The theorization around the monitoring system is needed not only at field level, but also within each organization appealing to their own logic. TLR can use its own voice and the one of prominent members using logics that resonate with those of different members. Greenwood, Hinnings, and Jennings (2015) remind us how the existence of multiple logics is increasingly common and exemplifiable in sustainability issues where the business efficiency and the sustainability logic must be reconciled. Regardless of the reason(s), until the disconnect between joining and monitoring in these areas is closed, the association will have to exert strong coercive forces over its members in terms of monitoring in order to get the information needed to provide the requisite services to its members and to fulfil its own normative requirements to the industry (Benjamin, 2008; Verbruggen et al, 2010).

Moving forward, it is important for the association to take into account the reasons why organizations join it in the first place when designing its monitoring system and selecting indicators. Stakeholder involvement has already been discussed in the literature (McCool et al, 2001), but continued communication needs to take place between associations and their members to create an efficient feedback loop for decision making (Chen, 2005). Misalignment can lead to strategic drift (Dwyer and Edwards, 2008) and firms trying to meet indicator goals that do not actually further their sustainability goals, which was the case with at least one of the members interviewed. By closing the gap between the joining and monitoring drivers, the over-all efficiency of the monitoring program should be improved, with benefits for both the associations and member organizations. This reinforces Torres-Delgado and Saarinen's (2014) argument that the development of monitoring systems should encompass the opinions

of people of different social and scientific backgrounds and political persuasion up and down the stakeholder ladder.

In order to bolster the suggestions made by this study, further research into the effect of increased education for organizations about the monitoring process and goal setting is needed. Further research using different collection and analysis methodologies may be beneficial, particularly in the case of a statistically significant quantitative study to compliment this qualitative research. This may allow for the identification of generalizable indicators that can be applicable to a wide context of firms and comparable within the industry. A longitudinal study may also be beneficial to understand how different organization's monitoring needs change over time. This can allow for the adaptation of monitoring systems that can accommodate growth and industry change. Further research into the actual outcomes and restrictions of the monitoring process that takes place on-the-ground would help increase the over-all reliability of this study.

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