

Going Beyond Facilitating Large-Group, Creative Problem-Solving Forums: A Case Study on Project Development in Tourism

Carla Sofia G. Machado^{1*}, Fernando C. Sousa², Ileana Monteiro³, João Pissarra⁴,
Antonio Juan Briones Penalver⁵

¹University of the Algarve / CinTurs / APGICO (Portuguese Association for Creativity and Innovation)

²APGICO (Portuguese Association for Creativity and Innovation)

³University of the Algarve / APGICO (Portuguese Association for Creativity and Innovation)

⁴ISCTE - Higher Institute of Labor and Business Sciences, Lisbon, Portugal

⁵University of Cartagena, Spain / CinTurs

*Corresponding author's email: csmachado@ualg.pt

doi: <https://doi.org/10.21467/proceedings.154.16>

ABSTRACT

With the purpose of understanding what happens during the “black box” of project execution, the authors decided to stay in charge of the whole project, instead of handing over the task to a designated coordinator. After a creative problem-solving forum, aiming at developing competences appropriate for the low season, in local tourism entrepreneurs of a Northern District of Portugal, five projects were planned. During project execution, first by maintaining contact with the five team leaders, and then by contacting directly every participant, it was possible to know the reasons for maintaining or giving up participating in the project. This procedure may provide new perceptions of project execution success probability, when everything seems to be lost, and gives us opportunities for the learning necessary for project management procedures, which must be regarded after problem-solving forums.

Keywords: Creative Problem-Solving; Large-Group Methods; Group Facilitation; Project Management; Tourism Projects

1 Introduction

Local accommodation housing, after being regulated by the government, has spread throughout in Portugal (INE, 2022), having now more than 2.800 houses and apartments registered for lodging, corresponding to almost 73.000 beds and more than two-million users, in 2021. In the district where the project took place, more than 300 houses were registered as local accommodation, bringing in a large but non-specified number of tourists, which makes this activity one of the major sources of revenue for the region. Nevertheless, the activity concentrates during the Summer, mostly in July and August, reducing much during Spring and Autumn, and is almost non-existent during the Winter, in spite of many events occurring, as well as sunny weekends, which could attract more tourists, if properly advertised, especially among local accommodation users.

That is why the board of a city hall, in the Northern part of Portugal, decided to invite local accommodation owners and tourism company managers for a problem-solving forum, based upon their knowledge and possible influence to carry on projects of a regional interest in tourism. The mayor considered that the region could bring in more tourists if the owners and managers could benefit from training and collaboration, and so he set as the objective for the forum, *to define a training plan for improving low season tourism results, for owners of local lodging and tourism company managers.*

The forum went on as planned, resulting in five projects, related to training, association, inquiries, and meetings, which were to be executed within two months. From previous experiences (Sousa, *et. al.*, 2016) we knew that the probability of the planned projects being carried out, in similar circumstances, was very low, and so we decided to stay in charge of the coordination, instead of giving it away to a person designated



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Proceedings DOI: [10.21467/proceedings.154](https://doi.org/10.21467/proceedings.154); Series: AIJR Proceedings; ISSN: 2582-3922; ISBN: 978-81-965621-1-3

by the mayor. It is a common procedure for facilitators (Sousa & Monteiro, 2019), after large-group creative problem-solving sessions, where projects are planned, to step out of the process and let the coordinator designated by the client go ahead with team leaders until projects are executed. This strategy may work well in structures organizations like a company, if the manager in charge succeeds in keeping the momentum, but not with voluntary groups, who have no formal attachment to the structure that was set for a certain project (Davis, 2014).

After one week, due to negative feedback from team leaders, telling that they had not succeeded in gathering the teams, we thought the projects would not be carried out, and so we decided to make telephone calls to everyone involved, in order to learn about the reasons they had given up. To our surprise, almost two thirds of the participants declared that they were interested in continuing with the project, but that, for various reasons, they were not able to keep on with the project schedule. We organized a meeting to reformulate the projects, and to set a new date for project accomplishment, but due to the low level of attendance, we decided to postpone things for after the Summer.

That is why we think that, in these circumstances, project coordination must be made by the facilitating team, and so this paper aims at describing procedures that can be adopted by creative problem-solving facilitators to keep low committed participants enrolled during project execution.

2 The Adoption of a Small-Group Problem-Solving Method

Following previous studies on small-group creative problem-solving procedures (Sousa *et al.*, 2014), a four-step model was designed (see Figure 1), comprising Objective-Finding, Problem-Definition, Action-Planning, and the Action itself. The sequence of divergence (<) and convergence (>) is maintained only during the Objective-Finding and Problem-Definition steps, allowing more options to be available to choose from.

Within an orientation supported by several authors, listed in Chung and Choi (2016), which concentrates participants on action planning rather than idea production, this model focuses team members on task implementation. This is achieved mainly by devoting more time to action planning rather than problem definition and ideation, setting up tasks and responsibilities, using management control measures, establishing a communication system, follow-up coordination meetings, and final debriefing deadlines. It provides an initial structure for the group during the divergent phase of Problem-Definition, followed by an emotional linkage between members, as efforts are focused on reaching a consensus during the convergent phase, so that the group may start working as a team. Another structuring step follows during Action-Planning, when the team members' creativity is expressed during the "how to?" development of each task in the plan. During the Action phase, the establishment of an effective communication structure within the team facilitates the collective awareness of what each team member is doing. Also, advertising the project within the organization reduces resistance to task accomplishment and increases peer pressure for the team to comply with the project's requirements.

Designating an appropriate project coordinator is determinant for the success of the project. This will help maintain a constant interface between management and the team, which is fundamental for the alignment of management objectives with the team's actions and interests.

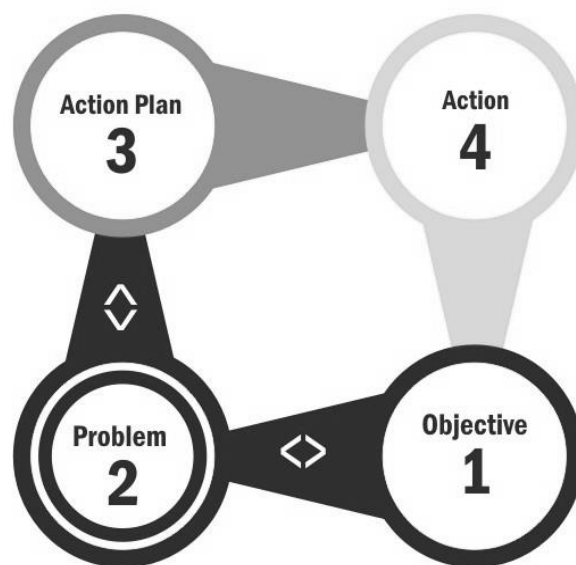


Figure 1: *The Four-Step Problem-Solving Method (Sousa et al., 2014 p.35)*

In Objective-Finding, a pre-consultation (Basadur, 1994) takes place with the manager in charge (client) so that the objective, group composition, and administrative requirements may be set. During the interview, the manager is lead to produce images of causality, as advised by Bushe and Storch (2015), in such a way that the implications among objectives may become clear enough to facilitate a final choice for the team to work. Also, as suggested by Strauss (2002), group composition is set and should involve the stakeholders relevant for the project, in terms of knowledge, power or implication in the possible outcomes. Group composition is mandatory to gather the different types of knowledge needed and reduce organizational resistance by including those who have the power to delay the project or may be affected by its outcomes. During Problem-Definition, a balance between positive and negative emotions is created in order to favor creativity, when the team enumerates all possible barriers to reach the objective and selects a few, which are transformed in challenges rather than obstacles, by adding the expression “What are the steps needed in order to...?”. This, according to Johnson (2011), can contribute to producing new ideas depending on context and how people make meaning of the situation they are in. It also transforms a potential “negative” problem into a positive statement. From the list of challenges, the group makes a selection, using the convergence tool *telescope* (Basadur, 1994), where each participant makes and justifies a few choices. The manager selects a final problem definition to work with.

In Action-Planning, the team starts by listing all tasks needed to achieve the goal and then puts them in order of execution. In coordination with the manager, each task is assigned to a sub-team that defines how the task should be executed, who will be responsible and sets the deadlines for the outputs. The last step (Action) starts after the planning session.

3 Adapting the Small-Group Problem-Solving Method to Work with Large Groups

This small-group problem-solving method was adapted to work with large groups, first in a study with higher education students, described in Sousa *et al.* (2015), aiming at bringing 62 participants, randomly arranged in ten groups, to solve the objective consisting in the preparation of a single common essay, which would involve all students. The groups discussed the issue for an hour, resulting in a consensual problem,

written in a challenge format: *What are the steps needed to structure the project so that the physical constraints (e.g. difficulty in meeting) can be overcome.* After some discussion, the groups identified five key tasks to solve the problem: (1) Define the topics and subtopics; (2) Establish the process of assigning the sub-themes to groups; (3) Create a platform for virtual communication and schedule face-to-face meetings; (4) Improve personal knowledge (establish scheduled meeting points); (5) List individual skills in each of the defined sub-themes. Then the students were asked to regroup into five groups, according to personal preferences, around each of the five identified tasks, and asked to establish action plans to be implemented within the next three months. The whole forum lasted for three hours.

Approximately three months later, in a session held at the appointed day, almost all students attended the presentation, during which each component of the collective work was demonstrated. A 200-page essay, organized, written and presented with a standard of quality above average, was delivered through the virtual platform two days after the presentation. The study included the use of small-world network analysis, before and after completion of the project, in order to appreciate the evolution of the whole group. The findings of the research indicated that the actions taken after the large-group session led to an increase in the density of communications and the emergence of leaders who acted as brokers between network clusters.

The next attempt (Sousa *et al.*, 2016), in using this small-group problem-solving method with large groups, was made in a community development context. The study aimed at assessing the effectiveness of the four-step, large-group method in project development, using a project commitment questionnaire. Nine civic forums were planned and executed in order to develop the participation of civil society in democracy. A total of 318 civil society representatives produced action plans for the celebration of the anniversary of the Portuguese Revolution (April 25th, 1974), as well as for local development. The participants, invited by local committees, had very diverse experiences: eleven per cent were former military, who participated in the revolution; fifteen per cent belonged to associative boards of sports, social support, and recreational local associations; and thirteen per cent belonged to organizations linked to artistic activities, including theater, music, museums and art galleries. About eight per cent belonged to regional state entities (six per cent to the municipalities). The local media also participated actively, representing eight per cent of the total. Teachers and students from secondary and higher education schools accounted for twenty per cent of participants, and ten per cent were professionals from various fields, such as trade unionists, banking or administration. Entrepreneurs and business managers from different sectors of activity (seven per cent) participated, as well as retired professionals, representing eight per cent of the total.

Furthermore, in collaboration with one of the twelve administrative regions of Lisbon, a forum for the promotion of local development was organized, gathering local associations and people representing the different types of knowledge and authority in this parish of 40,000 people (e.g., police, firefighters, theatre, art galleries, libraries, music, primary, secondary and higher education schools).

The forums initially lasted for eight hours. However, given the logistical complications, dropout rate, and costs associated with the food service, we decided to reduce the sessions to half of the time, thereby avoiding lunch.

In every forum, the chosen challenges were mostly connected with the need to reach out to the younger generation and develop intergenerational projects of civic collaboration. With regard to the projects, the concentration was on events and surveys, as well as the construction of messages to be disseminated and the use of appropriate media.

The outcomes obtained demonstrated the effectiveness of the method in producing action plans in a short time and an increase in commitment to projects as a result of the sessions. However, session commitment did not reveal itself a successful predictor of the projects' execution. The forums allowed us to improve the

large-group method as a tool to help civil participation in decision making and regional development. Furthermore, results did not vary depending on the session length, with the eight-hour sessions obtaining similar results to the four-hour ones.

One of the most important aspects learned by the research team was connected with the definition of which entities represent the powers and the existing knowledge in a region. However, the fact that many of the people invited were members of governance boards, and were not accompanied by their assistants, was relevant in reducing the probability of execution due to the time available and priorities these leaders had to cope with.

From these two experiments we built a large-group method, trying to bring together the advantages of both the problem-solving protocol and the large-group methods taken as references. The main similarities and differences, between the large-group methods presented and the adapted four-step one, are indicated in Table 1. Details are described in the Method section.

Table 1: Main Similarities and Differences Between the Large-Group Methods Chosen as References (Future Search and Appreciative Inquiry), and the Four-Step, Small-Group Problem-Solving Protocol, Adapted to Large Groups.

Procedures	Large-group methods	Adapted method	four-step
Participants	30-150 or more	30-80	
Duration	16-24 hours	4-6 hours	
Groups	Sub-groups of 8 members each	Same	
Small-group facilitators	Designated by small groups	Same	
Emphasis	Reaching common ground	Setting an action plan	
Past history; present and future trends	Within the session	Previous diagnosis and collection of success stories	
Time for sharing small-group conclusions	Yes	Yes	
Organization	Steering Committee	Same	
Mixed and homogenous groups alternate	Yes	Yes	

4 Leadership in Low-Committed Groups

Collaboration between multiple stakeholders, such as forum participants, is important in several dimensions: first, collaboration facilitates the formulation and resolution of complex problems; second, this collaboration is characterized by numerous uncertainties, ambiguities and competitions between partners, forcing the different actors to become aware of the changes in the environment and their need for adaptation, making creativity and innovation key factors in adaptive responses (Koppenjan, Koppenjan & Klijn, 2004). A third dimension is its orientation towards the active search for innovation and collective ambition to implement solutions beneficial to the community. The forum leverages the ability to refresh the portfolio of ideas and accelerates each partner's choices and execution.

Promoting and facilitating collaboration fits into the patterns and processes of social interaction, generator of collective creativity in solving problems (Hargadon & Bechy, 2006; Harvey, 2014). Collaboration outcomes can be enhanced by the presence and leadership of a facilitator, as the extensive literature on creative problem solving, and brainstorming in particular, demonstrate (Paulus & Kenworthy, 2019). In the

forums, the presence of an external facilitator represents an attractive challenge for any of the entities and partners involved, and the quality of the relationship with the participants, according to the LMX theory (Kirrane, *et. al.*, 2019), can stimulate collaboration and curiosity to remain connected to the project, even in individuals with a low level of commitment. The facilitator, in the role of leader, by offering psychological safety, autonomy, trust, support and encouragement to the participants, reinforces the connection and willingness to participate. In parallel, the expectation emerges that the facilitator can provide or help identify resources that will benefit everyone. And, therefore, even with low levels in initial commitment, most subjects will show a willingness to carry out the projects.

5 Method

After a pre-consultation a forum was planned, using the four-step protocol in a session devoted to develop tourism projects, and maintaining the responsibility for the facilitation during project execution. Statements related with reasons to stay or to step out of the project were collected next to every participant.

6 Subjects

Thirty subjects participated in the CPS session. Twenty two of these subjects were owners of local lodging facilities, three were managers of tourism companies, and five were civil servants of a town hall tourism department, situated in a Northern district of Portugal, whose mayor intends to do his best to develop the tourism within the region. The owners were mostly middle-aged people, who had inherited large country mansions and adapted them to be rented to tourists. Lacking digital and accountancy abilities these owners normally resorted to younger relatives to deal with financial and marketing issues. A younger minority, who had made investments in this type of houses, and had all the necessary competencies to run the business, were also part of the group. The tourism company managers, and the civil servants, were between 27 and 45 years-old, all of them with university graduations and experience in the field.

These subjects belonged to a mailing list, containing more than 100 contacts inserted in the business legal authorizations, which might not be updated. Letters of invitation were sent by the tourism department, and 35 registrations were made, from which only 25 attended the meeting, plus the five members of the tourism department. The majority of the participants had to travel more than half-an-hour to get to the forum.

The session was headed by the deputy mayor, facilitated by the president of APGICO, with the assistance of three civil servants for administrative tasks.

7 Procedure

Following the procedure taken in previous projects, headed by the deputy mayor, concerning forest management and agriculture, a pre-consult was run, resulting in the definition of the objective for the forum. Next the steering committee sent a handout to registered participants, containing all the details for the meeting.

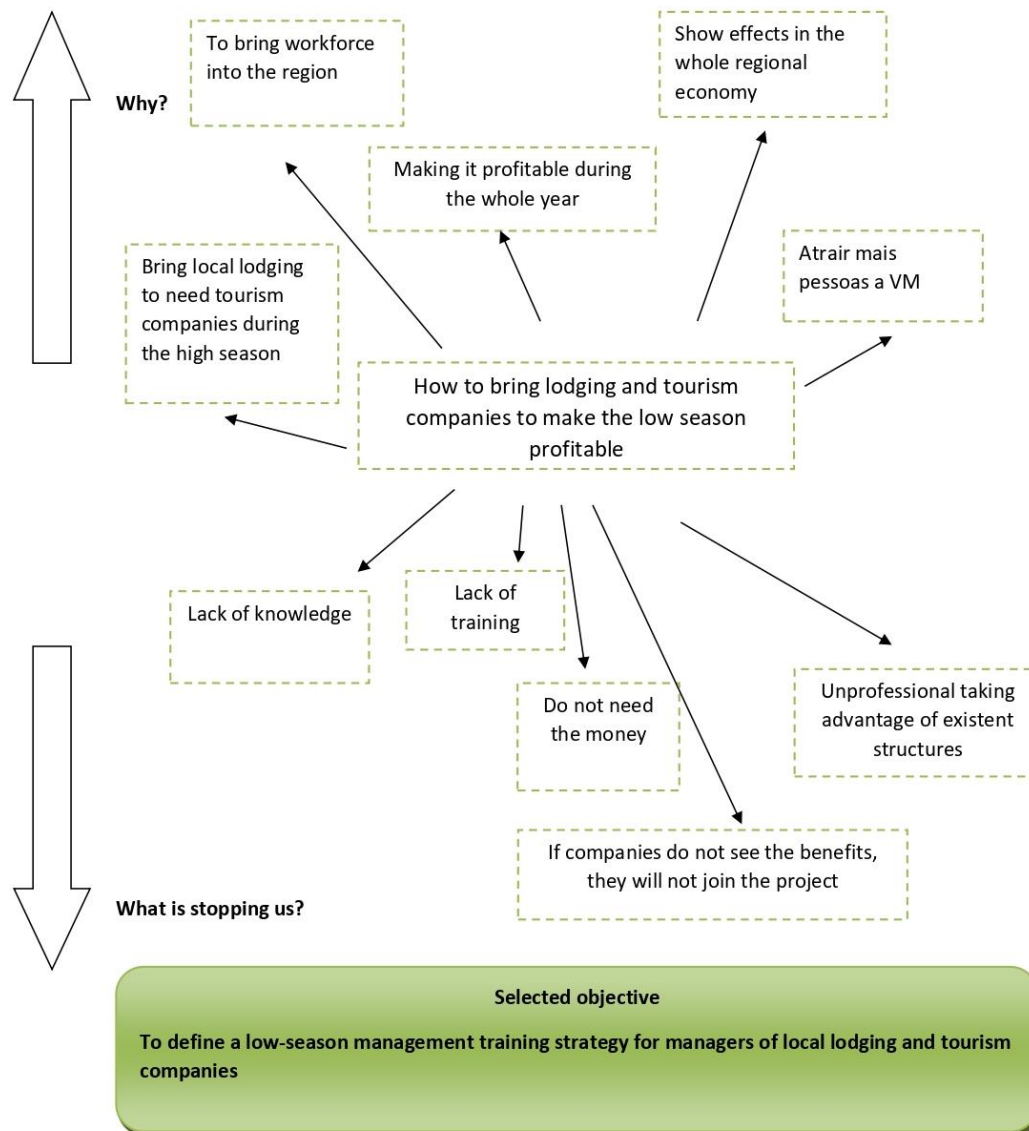


Figure 2: Pre-Consult Map

The forum took place as planned, starting with five random groups of six members each, with a team leader designated by the group. According with the agenda, each group defined two main problems, from which the deputy mayor selected four:

What are the steps needed to:

- Increase the supply of information in English and Portuguese?
- Promote periodic meetings of debate?
- Identify the necessary training areas?
- Take advantage of the high season to publicize the low season?

By selecting one of these problem definitions, each team made a list of possible solutions, from which the deputy mayor selected six possible projects, listed in a screen after the break:

- Increase private information sharing;
- Administer questionnaires to entrepreneurs;
- Creation of an association of tourism entrepreneurs;
- Take advantage of the high season to promote the low season;

- Complete the winter program;
- Promote training actions in the area of tourism;

Returning from the break, each participant chose a group to participate, resulting in five teams, with three to six members each. Three participants left the forum during the break, and the project “Take advantage of the high season to promote the low season” was not selected. Each team designated a coordinator, and made an action plan for the project, which was presented at the end of the session. A follow update was set to two weeks, gathering the facilitator and the team leaders, and the final date for the whole project was set for two months afterwards.

As indicated in the Introduction, it was decided to stay in charge of the whole project, instead of handing it over to someone designated by the deputy mayor, as previously done. From information received after the forum, it seemed that none of the teams had attended the scheduled meetings, in person or virtually, and so we decided to contact every participant, in order to know the reasons why they had given up. To our surprise, the majority declared that they would like to stay with the project but that, for some reasons (see Chart 1), they had not had the opportunity to attend the scheduled meetings.

Based on the statements of participants a meeting was scheduled for the date in which the project had been set to end but, from ten registrations, only four showed up. It was then decided to postpone the meeting to the end of September. Ten registrations were made to the September meeting, which had to be postponed for October, due to the sudden absence of the deputy mayor. The meeting will take place as scheduled, and we hope that at least three projects will be carried out till the end of November. During that meeting, the results of the administration of questionnaire for managers (one of the early projects) will be discussed.

8 Results

The statements resulting from the interviews made by telephone to the participants were resumed to registration units concerning the reasons for staying with or giving up participating in the project. As can be seen in Chart 1, 16 from the 27 participants said they would like to continue with the project while five declined, and six could not be reached, mainly due to wrong telephone numbers. As to the comments, the time pressure was the constant, also because the high season was on, and some showed the attitude to “wait and see”, or “go with the others”. Signs of “public-private” separation still showed, and the reasons to quit referred to no help needed, difficulty to keep up with requirements, and time pressure.

These results surprised us, as we were convinced that the large majority would not want to continue.

Table 1: Registration Units of Answers from Participants When Inquired About their Participation in the Project

SUBJECT	TEAM	REGISTRATION UNITS	STAY	LEAVE
1	1	Guest cancel because of covid If there is a decision, he stays with the project	X	
2	1	A lot of work: practice, exams Knows nothing about the project		X
3	1	Stays with the project Little time	X	
4	1	No time Only civil servants stay with the project If a group wants to work, she will help Nobody comes to the meetings People think it is the city hall that must solve all the problems	X	

1 and 2	2	Work Daughter with covid Cancer patient Already 60-years old Only 6th grade Should be during the Winter More interested in Gerès Does not speak English Life experience (immigrant) Husband alone in farming		X
3	2	Stays with the project Little time	X	
4	2	This is not the way It is the only one who can survive with rural tourism It is his only work To create a brand The city hall fails very much	X	
5	2	Made the questionnaire alone Time is taken (accountant and manager; had a stroke) Only X helps People do not read the announcements	X	
1	3	“Each one takes care of oneself!” It is the high season Too busy Stays with the project	X	
2	3			
3	3	Clients give me grade 10 The project does not bring me benefit Not available		X
4	3			
5	3	Very busy Stays with the project	X	
6	3	On vacation	X	
1	4	Each one has a task The group did not meet	X	
2	4			
3	4			
4	4	A colleague who is supposed to write, is abroad High season makes things difficult	X	
5	4	Sick Has done something	X	
6	4			
1	5	Waits to see what the colleagues present Each case is different Is complicated	X	
2	5	Nobody showed up It is the least motivated	X	
3	5		X	
4	5			
5	5	Have not met the others Not available I have to take care of my grandchildren		x
6	5	Stays with the project	X	
TOTAL	27		16	5

9 Discussion and Conclusions

These results surprised us, as we were convinced that the large majority would not want to continue. Was it because the presence of a facilitator may enhance participants' project commitment, therefore supporting the findings of Paulus & Kenworthy (2019), or just because the project director and coordinators misinterpret participants' level of commitment, and give up trying to get things done? Referring to previous projects, where the external facilitator team direct contact with the participants ceased at the end of the problem-solving forum, the designated coordinators had not been able to get the participants involved in project execution, and no final results were obtained from the designed projects. In these cases, no direct contact between the project leaders and the participants was made, except to conclude that the tasks had not been carried out, therefore concluding for project failure. Even the possibility of training facilitators to enhance the probability of project execution seemed not to work very well, perhaps because these facilitators cannot attain the level of expertise of an experienced professional facilitator or, better said, because the trained facilitators do not have enough trust in their expertise to carry out the process. If this is true, no matter the efforts, the external facilitator will always be preferable, unless it represents a cost barrier for the organization (in this case the facilitator team participated *pro bono*).

From the literature (Kirrane *et. al.*, 2019) we know that the presence of a trained facilitator increases participants' commitment, but the research concerns the presence during problem-solving, small-group or large-group sessions, but we do not know if this is true during project execution. Also, one thing is to facilitate groups in companies or other structured environments, where teams and individuals are committed to reach desired results, and another scenery is to work in unstructured organizations, where participants do not recognize a formal leader, and differ deep between one-another in their capabilities and commitment levels, which are normally very low. In these cases, a competent facilitator might attain considerable levels of commitment during the sessions (Sousa & Monteiro, 2015), but that does not guarantee that the level will stay throughout project execution. That is why it is important not to give up, when the first signs of low project commitment appear. Keeping a direct communication with participants, and being prepared to lose a considerable amount of project members, therefore resulting in the number of projects being executed, seems to be a good suggestion. Even if just a small percentage of projects is executed, it may happen that more participants come into being, when facing results.

Above all this, nothing is possible if the person responsible for the whole project is not committed. In this case, the deputy mayor was the first not to give up, to thrust the method and the facilitator, and to insist that meetings be rescheduled till a considerable participation is achieved, which is what we expect from the next meeting.

This research contributed to open a new research line, concerning what happens during the "black box" of projects, which is to say, project execution, and it is possible that, by the time of EACI's Conference, we will have some results to show.

10 Declarations

10.1 Funding Source

This paper is financed by National Funds provided by FCT- Foundation for Science and Technology through project UIDB/04020/2020.

10.2 Publisher's Note

AIJR remains neutral with regard to jurisdictional claims in published institutional affiliations.

How to Cite

Machado *et al.* (2023). Going Beyond Facilitating Large-Group, Creative Problem-Solving Forums: A Case Study on Project Development in Tourism. *AJR Proceedings*, 140-150. <https://doi.org/10.21467/proceedings.154.16>

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