



## Workshop methodology design: Innovation-oriented participatory processes for sustainability

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### ABSTRACT

Workshop methodologies based on overarching knowledge structures are necessary for a shift of the tourism sector towards sustainability. We adopted a participatory action research approach and designed a workshop methodology based on the main tenets and tools of the theory of change, design thinking, and sustainable business models. We tested this methodology within a project initiated by a destination management organisation to promote innovation during the covid-19 crisis and used the results to identify improvements and recommendations for future applications. Although further tests are needed, the study proved that the developed methodology has great potential for promoting the systemic change, creativity, collaboration, empathy, and empowerment that are necessary for a sustainability shift.

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### Introduction

Collaborative innovation for sustainability in tourism needs effective workshop methodologies, i.e. sets of procedures, tools, and guidelines to underpin repeatable processes and achieve pre-determined objectives. Numerous scholars argue for the importance of collaboration between various stakeholders who influence, and are influenced by, tourism (e.g. Bramwell & Lane, 2000; Jamal & Getz, 1995). Some studies highlight how collaboration can contribute to meeting sustainability challenges that require different types of knowledge, perspectives, and collective efforts to support action (e.g. Phi & Dredge, 2019; Waligo, Clarke, & Hawkins, 2015), while others focus on factors such as knowledge and the leadership of collaborative innovation (e.g. Halme, 2001; Vernon, Essex, Pinder, & Curry, 2005). Workshops are used quite often to enhance stakeholder relationships, promote trust, and co-produce feasible solutions for sustainability (e.g. Ngo, Hales, & Lohmann, 2019; Phi & Dredge, 2019). Nonetheless, few tourism scholars discuss workshop methodologies for assisting stakeholders in moving collaboratively and innovatively towards sustainability.

Workshop methodologies can have limited impact if they are not innovation-oriented, meaning that they lack shared beliefs and understandings that guide strategies and actions for promoting learning in dynamic environments (Siguaw, Simpson, &

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Enz, 2006). Sustainability learning promotes behavioural changes and critical re-consideration of assumptions that, eventually, can lead to deep and powerful transformations (Fennell & Bowyer, 2020; Koutsouris, 2009; O'Brien & Sarkis, 2014). Some innovative workshop methodologies adopted in tourism involve user-centred design, futures thinking, and scenario planning (Benckendorff, 2007; Font, English, Gkritzali, & Tian, 2021; Page, Yeoman, Munro, Connell, & Walker, 2006; Varum, Melo, Alvarenga, & de Carvalho, 2011). Although suitable for application to sustainability issues, we argue that such workshops risk being peripheral activities or episodic exercises of creativity. To avoid such risk and recognising the central role of knowledge creation and sharing in filling the theory-practice gap in sustainable tourism (Fennell, 2021), we propose a workshop methodology based on a learning perspective that links creativity and actions to a shared vision to promote critical systemic thinking.

This study developed and tested a workshop methodology that integrates the theory of change with design thinking and some frameworks from the sustainable business model literature. The theory of change is often used to support strategic planning and social change and is applied to identify desirable long-term effects for groups of people (e.g. communities) and the causal mechanisms that can lead to such effects. To further integrate this theory's focus on change and direct it towards sustainability, we combined it with design thinking—a creative process for designing innovative solutions to complex problems—and sustainable business model frameworks, to include sustainability in business logic. Our ambition was to contribute to the gap observed by Baldassarre, Keskin, Diehl, Bocken, and Calabretta (2020) between sustainable design theory and its implementation in practice. The research question was: How can we design a methodology to enhance innovative collaboration for more sustainable tourism? To address this question, we developed and tested Mister Wolf workshop methodology (hereafter Mister Wolf). The methodology's name derives from the memorable character in the 1994 film *Pulp Fiction* and his problem-solving attitude. The name was chosen to highlight a need that emerged during the test, which is the willingness and capacity for workshop developers to adjust the methodology to contextual challenges and possible unexpected events.

## Theoretical background

To support businesses in moving towards sustainability, Baldassarre, Konietzko, et al. (2020) recommend collaboration between academics and practitioners to conduct real projects and develop a common language. This is done by some scholars using design thinking and sustainable business models in workshops for companies (e.g. Bocken, Rana, & Short, 2015; Geissdoerfer, Bocken, & Hultink, 2016). Within the tourism literature, a similar position is observable in some studies concerning experiential practice-based learning. For example, Phi and Clausen (2020) use design thinking to promote innovation learning in an educational setting, and Duxbury, Bakas, and Pato de Carvalho (2019) use business models in workshops with enterprises, municipalities and regional development associations. In line with such studies, we recognise workshops adopting design thinking and business models as valuable platforms for sustainability advances in tourism. Our study's originality lies in the fact that workshops can benefit from a methodology based on an overarching knowledge structure, i.e. a coherent system of activities that can be designed to facilitate the socio-cognitive process of learning. We argue that an overarching knowledge structure in which individuals and groups make explicit the connections between goals and endeavours is useful to manoeuvre the innovation process through cycles of reflection and action (Van de Ven, 2017). This section outlines the three theoretical perspectives on which our study was built and explains how their integration achieves more than the sum of their parts to enhance collaborative innovation towards sustainability.

### *The theory of change workshop methodology*

The theory of change can be useful for supporting innovation in response to societal challenges. This theory is a set of assumptions and causal relationships that explains the mechanisms and reasons behind specific outcomes (Vogel, 2012). As a methodology, the theory of change stimulates reflection and action by combining ideas from the evaluation tradition with the participative processes of informed social change (Vogel, 2012). The evaluation tradition guides the design of initiatives and the monitoring and assessment of their impacts in a systematic way, linking inputs and outcomes and improving planning and performance (Vogel, 2012). These processes rely on the identification of short- and medium-term outcomes through a backward process that starts with a shared vision of change for the desired long-term impact (James, 2011; Vogel, 2012). From a social change perspective on participative processes, the theory of change emphasises the importance of the peculiarity and dynamism of the context in which the desired changes might occur and the existence of various relevant stakeholders, each with a different perspective and set of sometimes implicit assumptions and beliefs (Vogel, 2012). Overall, the theory of change approach to workshops offers the necessary structure and flexibility to plan and monitor feasible solutions to complex challenges.

Workshops based on the theory of change adopt various tools to support participants' group activities and stimulate a sense of empowerment, which is particularly important in the case of sustainability issues. Among these tools are the power/interest grid, the roadmap to change, and the Gantt chart (Tapic & Rasic, 2012). This type of workshop starts by defining a desired long-term impact. In this first phase, the participants address their role in the specific context and identify the main stakeholders that might influence or have an interest in the desired impact. This can be done using the power/interest grid, which enables identified stakeholders to be mapped. Through discussions within and across the various groups, the participants then engage in backward mapping and identify the short- and medium-term outcomes that can lead to the desired impact. The result is represented using the so-called roadmap to change—a map that shows the various rigorously and consequentially structured outcomes and the pre-conditions for them. Finally, a Gantt chart can be used to assign roles, activities, and resources, including monitoring and assessment routines. These tools—the power/interest grid, the roadmap to change, and the Gantt chart—help to visualise the way the

participants think and can contribute to making sustainability challenges more explicit and manageable. In this sense, they can make the workshop participants feel less overwhelmed by sustainability issues and, therefore, empowered.

Theory of change scholars and practitioners acknowledge two major challenges of such a methodology, both relevant to sustainability. First, involving all the relevant stakeholders can be problematic due to power relations and possible conflicts of interest (Vogel, 2012); hence, workshop facilitators can experience a tension between giving participants control of the aforementioned process and taking a more active role (Prinsen & Nijhof, 2015). Second, it is difficult to uncover all the workshop participants' assumptions and beliefs (Vogel, 2012); consequently, it is important to allocate sufficient time for the activities and use professional facilitators to create a climate of trust that can facilitate self-reflection and a willingness to share personal views (Vogel, 2012). If well managed, this approach has great potential, since the workshops can become important sources of inspiration for change (Prinsen & Nijhof, 2015). Both challenges (involving the relevant stakeholders and uncovering the participants' assumptions and beliefs) are important when dealing with sustainability, since the concept is value-laden, not universally understood and, in its stronger and more transformative sense, requires critical thinking (Fennell, 2019; Saarinen, 2006).

The theory of change has received scant attention in the tourism literature as a workshop methodology. Phi, Whitford, and Reid (2018) use it to evaluate the assumptions and mechanisms influencing anti-poverty tourism initiatives. They apply the theory of change to plan and conduct interviews, arguing that power relations might compromise its application in workshops. Additionally, Getz (2019) discusses the theory of change as a framework to analyse sustainability and raises the question of who should lead sustainable change based on such research and practice. Both issues of power and leadership are addressed by our methodology.

### *The design thinking process and values*

Design thinking is applied to develop creative solutions to complex problems. It is an iterative design process that takes different interests, concerns, and values into consideration and is applied to problems that require innovation (dschool, 2020). The design thinking process usually involves the phases of understanding, observing, defining, ideating, prototyping, and testing, and a set of values, including empathy, optimism, experimentalism, and collaborative attitude (Brown, 2008). First developed in the 1960s, design thinking is used to gain competitive advantage in business contexts and to promote social innovation and changes towards sustainability (Brown & Wyatt, 2010; Buhl et al., 2019; Martin, 2009).

Design thinking is relevant to workshops concerning innovation for sustainability. Using an extensive range of tools, such as posters, sticky notes, and sketches, design thinking is suitable for exploring creative solutions to sustainability challenges (Maher, Maher, Mann, & McAlpine, 2018). In particular, the three initial phases of the procedure (understanding, observing, and defining) allow a reasoned framing of sustainability issues, and empathy relates to stakeholders' involvement and the inter- and intra-generational aspects of sustainability. Creativity, which is the fundamental value of design thinking, relates to sustainability solutions' disruption of business-as-usual thinking. Two aspects of design thinking can be challenging: the dependence of the process on tangible solutions, and the difficulty (as in the theory of change) of recruiting and engaging stakeholders to represent the extensive variety of knowledge and perspectives that sustainability requires (Kagan, Hauerwaas, Helldorff, & Weisenfeld, 2020).

In the tourism literature, design thinking is applied to investigate the design of experiences (Tussyadiah, 2017), collaboration (Robbins & Devitt, 2017), and education (Daniel, Costa, Pita, & Costa, 2017). It is only recently that design thinking has been used for sustainability product design (Font et al., 2021; Font, English, & Gkritzali, 2018) and destination participatory planning (Scuttari, Pechlaner, & Erschbamer, 2021). As in Scuttari et al. (2021), we use design thinking and emphasise the collaborative aspect of tourism destination planning, although we go further by integrating design thinking into a theory typically adopted for social changes, the theory of change.

### *Sustainable business models frameworks*

A business model can be described as the logic through which businesses create, communicate, and capture value (Teece, 2010; Zott, Amit, & Massa, 2011). Sustainability is at the core of sustainable business models (Abdelkafi & Täuscher, 2016; Schaltegger, Hansen, & Lüdeke-Freund, 2016). Several analytical frameworks represent this inclusion, and we highlight three. Firstly, value maps illustrate the value that is created, captured, missed, and destroyed and evaluate new value opportunities from the perspective of various stakeholders (Bocken et al., 2015). Secondly, innovation archetypes provide solutions for challenges concerning the environment and/or society and are usually grouped into three categories: technological (e.g. maximising material energy efficiency), organisational (e.g. developing scale-up solutions), and social (e.g. adopting a stewardship role) (Bocken, Short, Rana, & Evans, 2014). Thirdly, the triple-layered business model canvas visualises the economic, sociocultural, and environmental dimensions of sustainability through the integration of the various business components (Joyce & Paquin, 2016; Lüdeke-Freund & Dembek, 2017). Based on the importance of a variety of stakeholders, sustainable business model canvases are adopted to discuss sustainability and collaborative innovation-related issues for network building, smart city development, and governance (Timeus, Vinaixa, & Pardo-Bosch, 2020; Weiss, 2017).

The frameworks from the sustainable business model literature are useful tools for workshops aiming to promote creative innovation and collaboration; for example, participants can use sticky notes to map the relationships between activities to show created, destroyed, and missed value opportunities and reflect on present and future business activities (Bocken et al., 2015;

Geissdoerfer et al., 2016). Such value mapping can facilitate collaboration because it encourages workshop participants to consider multiple types of outcomes from their activities and to evaluate existing and possible future partnerships in terms of sustainability (Bocken et al., 2015). Due to their visual power, flexibility, and usability, sustainable business model frameworks can be adopted to support a workshop methodology that emphasises creativity and participation.

Business models are rarely discussed in the tourism literature (Reinhold, Beritelli, & Grünig, 2018; Reinhold, Zach, & Krizaj, 2019). Few scholars adopt them to study innovation, collaboration, social entrepreneurship and sustainability (e.g. Daniele & Quezada, 2017; Duxbury et al., 2019; Hjalager & Madsen, 2018; Orefice & Nyarko, 2020; Scheepens, Vogtländer, & Brezet, 2016). These studies tend to be theoretical or include empirical data collection methods such as surveys and interviews. None of these studies adapt business models to collaborative design or apply them in the context of workshops, which is our study's focus.

## Methodology

Following Getz (2019), we consider the theory of change a valuable approach to promote sustainable tourism. Due to its participative nature and focus on change, this theory can engage stakeholders in collaborative efforts and encourage them to reflect on complex issues, share their thoughts, and feel empowered to find feasible solutions. Due to its flexibility, we argue that the operationalisation of the theory of change can be modified following the design thinking process and organised as a learning path characterised by the design thinking core values—in particular creativity and empathy. Furthermore, we use sustainable business model frameworks (in particular, maps and innovation archetypes) to emphasise the sustainability component. Mister Wolf, by using principles and practices from these three approaches, constitutes a methodology that is more than the sum of its parts.

To design Mister Wolf, we applied a participatory action research approach to the *Innovasjonsløp* (innovation path) project initiated in response to the covid-19 crisis by the destination management organisation of Tromsø (Norway) together with the municipality, the association of town centre shops, and a local business association. Participatory action research is an umbrella term including action-oriented research approaches in which academics collaborate with non-academics with the aim to progress in knowledge and identify feasible solutions to practical challenges (Chevalier & Buckles, 2013; Kemmis, McTaggart, & Nixon, 2013). Such approach is applied in some tourism studies that emphasise the relevance of academic engagement (e.g. Goebel, Camargo-Borges, & Eelderink, 2020), and is in line with an experiential practice-based understanding of learning as a co-creation process (e.g. Jamal, Taillon, & Dredge, 2011; Ren, van der Duim, & Jóhannesson, 2021).

Our team comprised four people: three academics (one of whom had three years of experience as the chief executive officer of a local tourism company) and a consultant with expertise in the application of the theory of change in workshops. Our role in the project was to develop a process to promote stakeholder collaboration and the planning of common actions towards a vision of innovation and sustainability. Numerous formal and informal exchanges of ideas between the research team, the project owners, and the workshop participants occurred before and during the workshops. In the workshops, we adopted data collection methods including participant observation, group works with elaboration of maps, discussions, presentations, and questionnaires, informed by Kindon, Pain, and Kesby (2007).

### *The design of the Mister Wolf methodology*

We combined the theory of change with the design thinking process and values, using the frameworks and tools typical of such perspectives together with those from the sustainable business model literature. The five steps of Mister Wolf cover the design thinking phases of understanding, observing, defining, ideating, and testing, including two test rounds to integrate possible new inputs derived from the activities. We considered these two tests important to stimulate critical reflection on objectives—namely, the framing of the sustainability challenge and the definition of a shared vision, the evaluation of innovative solutions in terms of sustainability, and the final decision about implementable initiatives. We recognised the importance of participant reflection to test Mister Wolf, which took place through an anonymous evaluation of workshops 1 and 2, and an oral evaluation at the end of workshop 3.

#### *Step 1: setting the scene*

The objective of Step 1 is to start framing the destination's sustainability challenges in terms of collaborative innovation and in line with an overall vision of a "more sustainable Tromsø". The activities include various meetings between our team and the project owners, the identification of relevant stakeholders, and the invitation of the workshop participants. The project owners and research team use the power/interest grid (Mendelow, 1991) for these activities. As aforementioned, the grid facilitates the mapping of relevant stakeholders based on their power of influence and interest, and is used as a vehicle to explore and develop a shared understanding of potential contextual challenges. Step 1 includes the preparation of workshops materials (posters representing the tools, persona cards, sticky notes, and PowerPoint presentations).

#### *Step 2: vision and creativity*

Step 2 takes place in workshop 1 (4 h) and aims to achieve a shared understanding and definition of the sustainability challenge, involving all the participants. The workshop begins with the team presenting the concepts of value, value challenge, stakeholders, and sustainability. The subsequent group work aims to elaborate a shared vision. This is linked to an activity with the value map. This map consists in three concentric circles representing created value, destroyed value, and future opportunities

for various stakeholders (shareholders/investors, partners/suppliers, employees, local community, natural environment), illustrated as circle fractions (Bocken et al., 2015). Importantly, a stakeholder category is left open to give the participants the chance to add relevant stakeholders not represented by the pre-defined categories. The participants apply sticky notes about the value created or destroyed for the various stakeholders, then they complete persona cards to express their desires for the future, placing them in the outer circle of the value map. This activity's guiding questions are: What value does your organisation create for each stakeholder? What challenges does the organisation face in creating such value? What challenges prevent it from creating more value? Imagine being one or more of the represented personas: what do you envisage and need for the future?

The second objective of workshop 1 concerns ideation. Each group selects three personas from the previous activity and writes on sticky notes possible innovative solutions for satisfying the chosen personas' wishes for the future. The tool for this activity is the innovative solutions table which represents the stakeholder categories and the innovation archetypes (Bocken et al., 2014; Bocken et al., 2015). The participants place in the table the selected personas from the relevant stakeholder categories and the sticky notes reporting the identified innovative solutions, according to their focus on technological, organisational, or social change.

#### *Step 3: test*

Step 3 gives participants the time to reflect and tests the ideas from workshop 1. The participants are given several days to discuss the following questions with their network of colleagues and friends: Are the ideas from workshop 1 relevant to all the stakeholders? Did all the stakeholders manage to have their say about the future they wanted? Are we thinking in sufficiently long-term ways? To what extent are the discussed values and solutions sustainable?

Meanwhile, the research team analyses the field notes and the data produced by the participants (sticky notes from the value map, persona cards, and innovative solutions table). The team prepares countable and cloud diagrams to present the results from workshop 1 in the following one, and a proposal of a shared vision for the forthcoming workshops, which emerges from the results.

#### *Step 4: the innovative path*

Step 4 uses the ideas that emerged in Steps 2 and 3 to reflect on the casual connections between the shared vision, intermediary goals, and preconditions relevant to sustainability. Step 4 takes place in workshop 2, a two day-long event: one day for all participants and another for the project owners. Day 1 begins with a plenary discussion to re-define the proposed shared vision and innovative solutions. A new ideation phase then focuses on short- and medium-term outcomes and preconditions for the shared vision. For this activity, the roadmap to change is employed. Following the team's presentation of the theory of change, the elaboration of the roadmap starts at the end of day 1, continuing on day 2, during which the project owners are tutored by the research team and assigned the task of finalising the roadmap for workshop 3. Their work is based on the ideas that emerge from the groups' mapping from day 1, and includes the proposal of some initiatives for the following months and years.

#### *Step 5: the way ahead*

The objective of Step 5 is to develop a schedule specifying activities, resources, and roles for some initiatives identified in Step 4. Step 5 includes workshop 3 (4 h), during which the project owners present their roadmap and their proposed initiatives. This is followed by a plenary discussion. The work continues in groups to elaborate a plan for future initiatives using a Gantt chart. In the following days, the representatives of the destination management organisation and the research team write a report to present the main results of the workshops to the participants.

## **Results**

We now report the results from the application of Mister Wolf to the *Innovasjonsløp* project. Firstly, we describe the results of our test. Then, we report about the workshop participation.

#### *Mister Wolf pilot test*

Table 1 presents the methodology as explained above (design thinking phases, objectives, activities for the participants and the team, tools), and, in the last column, the discrepancies between our methodological plan and the actual results and our reactions to these discrepancies.

#### *Step 1: setting the scene*

Several meetings were conducted during the two months preceding the workshops. The team discussed two possible contextual challenges, the first of which was the local Jante Law (i.e. a mindset that emphasises conformity, resists ambition and diversity, and is intolerant of outsiders (Fuglsang & Sørensen, 2013). We considered that this mindset conflicted with values relevant to innovation and could be problematic due to our research team being composed exclusively of non-Norwegians. The second aspect concerned communication; in particular, the use of English and the involvement of two team members only online. In an attempt to limit possible negative effects of these challenges, the following communication strategies were developed: (1) including the comments of team members resident in Tromsø regarding their emotional attachment to the town, (2) giving preference to

**Table 1**  
The Mister Wolf methodology and the test results.

	Steps	Objectives (in bold) and activities	Tools	Discrepancies and team's actions
		<b>Set the scene for the sustainability challenge</b>		
Understand, observe, define	1) Setting the scene (June–September 2020)	Team and project owners: discuss common grounds for collaboration, stakeholder mapping, and invitations to workshops Team: discusses contextual challenges and prepares materials	Power/interest grid	Tool not used, change of workshops' focus. Team: reflected on stakeholder representation in following activities.
Ideate	2) Vision and creativity (workshop 1: 23.09.2020)	<b>Start developing a shared vision</b> Team: presents the central concepts Group work: value mapping <b>Develop ideas about innovative solutions</b> Group work: identifies innovative solutions <b>Test the ideas from workshop 1</b>	Value map, personas, innovative solutions table	
Test	3) Test (1 week)	Participants: share ideas with their network of colleagues and friends <b>Develop a proposal for the shared vision</b> Team: analyses the workshop 1 data and develops a proposal for a shared vision <b>Agree on possible changes to the proposed shared vision and innovative solutions</b>		Limited creativity. Team: included motivational videos in workshop 2.
Re-define	4) The innovative path (incl. workshop 2: 29 and 30.09.2020)	Team: presents the workshop 1 results, proposed shared vision, and theory of change Plenary session: discussion of the proposed shared vision and the innovative solutions from workshop 1 <b>Identify medium-short term outcomes and preconditions towards the shared vision</b> Group work: elaborates on the roadmap Plenary session: sharing of ideas Project owners: discuss further outcomes, changes, causal relationships, and preconditions, and finalise the roadmap by assigning priorities and including ideas about initiatives <b>Discuss proposed initiatives</b> Project owners: present the roadmap and the initiatives	Roadmap to change	Limited feedback on workshop 1, some negative reactions to comments about limited creativity, slow progress with the tool. Team: provided additional tuition and developed a new tool for workshop 3.
Test, re-define, ideate, define	5) The way ahead (incl. workshop 3: 19.10.2020)	Plenary: discussion <b>Develop a schedule</b> Group work: elaborate on a plan for the initiatives <b>Write a report</b> Team and destination management organisation: write a report	Gantt chart	Change in responsibility for the report. Team: offered suggestions for further collaboration.

the Norwegian language for most of the group activities, and (3) using positive and encouraging expressions; for example, the expression “value destruction” used in the literature (Bocken et al., 2015) was replaced with “value challenge”.

Through meetings between the research team and the project owners, the focus of the workshops shifted from tourism destination development involving the regional destination management organisations to local development involving companies across various sectors. When discussing the criteria to select possible participants, we argued for the main criteria being the representation of the three sustainability dimensions and the involvement of representatives across the public and private sectors and civil society, and we offered our help in using the power/interest grid. Instead, the project owners decided that the main criterion for selecting participants should be their innovativeness, and they guided the invitation process. This resulted in 19 organisations from various sectors (hospitality, guided tours, museums, festivals, transportation, food production, handicrafts, research and communication services) agreeing to attend the workshops. The team reflected on the possible reasons why the project owners did not use the power/interest grid: the lack of time for the scheduled workshops and some resistance to involving specific stakeholders. When we noticed that the list of participants did not include any non-profit organisation, we expected that deeper reflections on the representation of all relevant stakeholders by the workshop participants would be promoted by some activities in the subsequent steps.

#### *Steps 2 and 3: vision and creativity, test*

The participants in the first workshop (16 people) engaged enthusiastically in the activities. They shared many ideas during the value mapping and persona card activities, but the ideation phase tasks to develop innovative solutions proceeded more slowly than expected. The combination of the stakeholder categories with the three archetypes seemed to be well understood, but the developed ideas were not as numerous and creative as expected. During the analysis of the data from workshop 1, we noted that one group created a new stakeholder category, labelled “national/global”. The group explained that this referred to possible negative environmental effects extending beyond local borders and partnerships with suppliers from countries with less fair working conditions.

Tourists were placed in the stakeholder categories of customers and local community. Some participants argued for the latter, saying that tourists could be considered temporary residents or guests because they “use the town together with the inhabitants”. The values and wishes for the future associated with the tourists were the experience of local natural surroundings, sometimes referred to as “untouched nature”, and the authentic local culture, often exemplified by Norwegian leisure activities such as fishing and eating hot dogs around campfires.

The most frequently represented stakeholders were the local community and the customers, followed by employees. The associated values and challenges were linked to the tourism sector as well as to other sectors and the quality of life of the town's inhabitants. Two examples of value were job opportunities and a lively town with cultural offerings, and examples of challenges were low-quality infrastructure and discrimination. Some challenges related to the covid-19 crisis; for example, on persona cards illustrating hospitality employees, some participants wrote: “We want go back to our jobs and be known as world-class-quality service providers”. Competence, knowledge, and learning were included both as value and challenges. Among the challenges, the following dilemmas relevant to tourism were noted: development for residents versus development for tourists, and pollution (in respect of tourism transportation) versus profitability (referred to as “fewer tourists”). Some conflicting perspectives on tourism were noted on the persona cards: for example, a musher stated: “Longer winter, more tourists!”, and a fisherman said: “Now the fishing tourists must stay away”.

The analysis showed that several participants used the persona cards to represent the environment and wildlife and express the wish for “clean nature,” which sometimes conflicted with the human presence and tourism. Two examples of the latter were a mountain saying: “I'd like to have visitors, but I can't clean up after the guests!”, and an orca declaring: “I want a clean, healthy sea, without tourist boats chasing us”. Also, animals used for food were included as non-human personas. These personas were used mainly to express the wish for a clean environment and good living conditions, which in some cases seemed to be associated with the improved quality of food and a lower carbon footprint; for example, a sheep was reported as saying: “Choose me! I'm zero-mile!” The analysis of the data from the innovative solutions table showed that the groupings of archetypes (technological, organisational, and social changes) were commented on regarding solutions involving local food production; toilets located in natural areas; events and educational/recreational experiences for both residents and tourists; and collaboration between schools, tourism companies, creative industries, and transport companies.

Based on the analysed data, we elaborated on the following long-term impact that could act as a shared vision about a more sustainable Tromsø:

1. An economy based on a competent local workforce (safe, meaningful jobs); resources attractive for investors; and the capability to provide residents (and tourists) with an environmentally friendly and innovative encounter with a northern Norwegian context.
2. Sociocultural well-being, supported by an inclusive community that takes care of its members' physical and mental well-being.
3. A clean environment that can be enjoyed (through recreational/educational activities) by local people and tourists, responsibly managed to utilise resources (food) and provide high-quality infrastructure.

We did not think that the participants' ideas for innovative solutions were particularly creative and decided to comment on this in workshop 2. We decided to stimulate creativity and motivation by showing two videos: a short documentary about an entrepreneur in Svalbard working with food production and tourism, and a video message by a professor working with renewable energy projects in Norway.

It is difficult to know how many participants did the homework assigned to test their ideas from the first workshop. As reported in step 4 (next section), the comments on such ideas, which were meant to facilitate discussion to re-define the shared vision and eventually evaluate and change the innovative solutions, were limited.

#### *Step 4: the innovative path*

The participants in workshop 2 (day 1, 14 people) had no substantial comments to make about the proposed shared vision or about the innovative solutions. The elaboration of the roadmap to change was much slower than expected, and the evaluation suggested that this was due to the limited time available for this task. The evaluation also showed that some participants reacted negatively to comments made by the team about their ideas not being particularly innovative.

We included two extra tutorial sessions with the project owners between the second and third workshop to explain in more detail the use of the roadmap to change. Some progress on the roadmap was made, and we completed it by adding some missing causal links. The identified medium- and short-term outcomes and preconditions were linked to the public and private sectors. Two examples of outcomes were a skilled workforce emerging from business–university–school collaboration and a common communication strategy targeting residents to emphasise the value of local resources. Examples of the identified preconditions were government support and funding. The initiatives proposed by the project owners were: a winter festival engaging local people (called “local ambassadors”) in promoting the destination; an event targeting local food-related businesses (producers, restaurants, and hotels), and the local school educating chefs on the use of local ingredients in traditional and new ways; and another event for local businesses, consisting of them sharing their unsuccessful experiences with one another. These events were intended to combine physical and online activities and be open to a restricted number of guests, including local people and tourists. Based on such initiatives, we prepared the posts for the Gantt chart to be used in the final workshop.

We suspected a lack of confidence by the project owners about the project outcomes, and decided to introduce a new tool to visualise the main processes and elements of the collaboration so far. This tool, called a sustainable network design canvas, was developed based on [Joyce and Paquin \(2016\)](#) and [Weiss \(2017\)](#). It showed the network's purpose, members, activities, processes of engagement and recruitment, beneficiaries, and impacts. [Fig. 1](#) illustrates this tool and includes the sticky notes that we

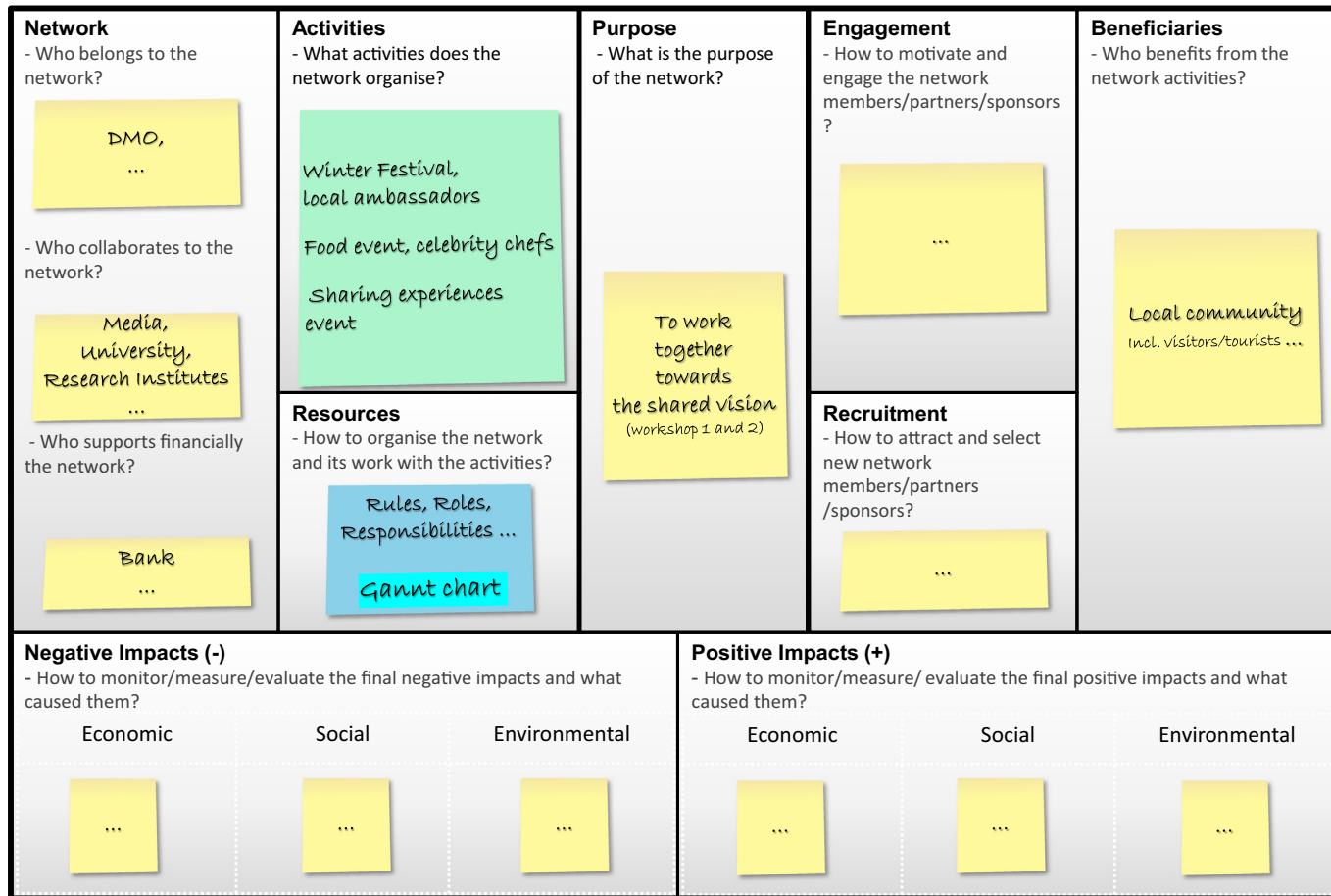


Fig. 1. The sustainable network design canvas (based on Joyce and Paquin (2016) and Weiss (2017)).



developed to describe the present status and to pose questions to stimulate reflection on further development of the initiated collaboration and introduce the Gantt chart (blue sticky note in Fig. 1), which would be used in the next step to plan the initiatives that emerged in the roadmap to change activity (green sticky note in Fig. 1).

#### *Step 5: the way ahead*

The participants in workshop 3 (7 people) commented on the three proposed initiatives (green sticky notes in Fig. 1) relating to the professionalisation of local business (in particular the tourism and hospitality sector), better preservation of local resources, and an improvement of cross-sectorial collaboration. In the evaluation, the participants expressed their intention to continue the planning of these initiatives, possibly involving other participants. The project owners observed that their priority had been on the socioeconomic aspects of possible initiatives, rather than environmental issues. This was mentioned with a sense of regret and explained by the need for short-term solutions to respond to the covid-19 crisis. Some participants asked for follow-up support for the planning and monitoring of the identified initiatives and requested similar workshops organised as taught courses.

The destination management organisation assigned to our team the task to prepare a final report. We used this opportunity to make suggestions for further collaboration, highlighting the relevance of the stakeholders' mapping and involvement and recommending the inclusion of environmental sustainability factors and monitoring and measurement activities. Roughly one month after workshop 3, the project owners applied for funding to implement one of the proposed initiatives—an event for local businesses to share their experiences of the covid-19 crisis and to participate in a competition to generate innovative ideas for winter tourism experiences.

#### *Participation*

Three of the four organisations owning the project participated in the workshops (4 individuals). The participants to workshop 1 and workshop 2 (day 1) were: tourism companies (4), organisations from the culture and creative industries (2), research institutes (3, of which 1 participated to both workshops), one employers' association and one food producer. Each organisation was represented by one individual, except for one organisation with two. The participation was higher than expected for workshop 2 day 2, as two participants belonging to one organisation joined the project owners. The participation was quite low for workshop 3. Some possible reasons for this that can be interfered from the participants' evaluation and some conversations during the workshops are: a not particularly clear communication of the expected outcome, a sort of fatigue due to numerous meetings arranged to face the ongoing crisis, and some negative reactions to the facilitators' comments on the limited innovativeness of the ideas elaborated in workshop 2 day 1.

#### **Discussion**

We developed and tested Mister Wolf to fill the gap between sustainable design theory and business practice (Baldassarre, Keskin, et al., 2020) with the intention of proposing a workshop methodology that can contribute to a shift of the tourism sector towards sustainability (Fennell & Bowyer, 2020; Siguaw et al., 2006). We now discuss the results of our pilot test regarding the theoretical foundation of Mister Wolf—the integration of the theory of change with design thinking and sustainable business models—and present a revised Mister Wolf framework with certain recommendations.

#### *The integration of the theory of change with design thinking and sustainable business models*

We proposed that, through the integration of the theory of change with design thinking and sustainable business models, Mister Wolf could emphasise elements that are crucially important for sustainability: change, collaboration, empathy, creativity, and empowerment. With regard to change for sustainability, the test showed that the workshop participants focused on the sustainable development of the town and local area, rather than the growth of the tourism sector. This was evident in the proposed initiatives and the way they were discussed by the participants (professionalisation of local business, better preservation of local resources, and improvement of cross-sectorial collaboration). This was heavily influenced by the project owners' initial decision not to focus exclusively on tourism businesses in facing the covid-19 crisis, and by their cross-sectorial position and the involvement of the municipal government.

We argue that this broad perspective on sustainability was reinforced by the considerable time invested in elaborating the shared vision. Mister Wolf was designed as a multi-workshop methodology with the intention of avoiding the development of limited ad-hoc solutions (Fennell & Bowyer, 2020; O'Brien & Sarkis, 2014; Siguaw et al., 2006). A multi-workshop methodology allows participants to reflect more deeply on their ideas, and for Mister Wolf, this was particularly true for the development of the shared vision through various tools and activities, adopting principles of design thinking. The roadmap to change from the theory of change literature (Tapic & Rasic, 2012; Vogel, 2012) and the sustainable network design canvas from the sustainable business model literature (Joyce & Paquin, 2016; Weiss, 2017) acted as reminders of that vision, which was included, respectively, as the desired long-term impact (workshop 2) and as the core value proposition (workshop 3). In the evaluation at the end of the third workshop, the conceptual link between the workshops was noted by some participants who requested follow-up support and taught courses. We interpret this, and the enthusiasm shown in the first workshop, as signs of their understanding of change as a process to achieve a collectively defined goal.

Mister Wolf confirms that collaboration for sustainability requires stakeholder involvement (Bramwell & Lane, 2000; Ngo et al., 2019; Waligo et al., 2015). In our test, the invitation of the participants and the use of the power/interest grid did not proceed as planned. This was possibly due to power relations and the involvement of academics in a practitioner-led project (Phi et al., 2018; Prinsen & Nijhof, 2015). Phi et al. (2018) applied the theory of change and deemed the use of interviews as the opportune approach to adopt in a context with strong power imbalance. While we acknowledge that our test was conducted in a less problematic context, we still found this theory's participative approach to be an essential element for subsequent collective action. We propose that academics collaborating closely with practitioners could be the driving force for the shift towards sustainability as advocated by Getz (2019). Based on the test, we recognise the challenge of involving workshop participants who could represent all the relevant stakeholders. To meet this challenge, we propose to include activities and tools at different stages to enable the participants to reflect on and, eventually, intervene in the possible low representation of some stakeholders. Mister Wolf includes the power/interest grid at the beginning of the process, persona cards and evaluations during the workshops, and the production of a final report making suggestions for further development of the identified collaborative efforts.

Collaboration requires strong relationships and trust (Ngo et al., 2019; Phi & Dredge, 2019), and we proposed that Mister Wolf had potential in this respect. In line with the literature (e.g. Bocken et al., 2015; Geissdoerfer et al., 2016), our test confirmed that the extensive use of tools added a playful aspect to the workshops, which was beneficial for encouraging engagement and rapport-building among participants. A sign of trust was observed in the test. Although it conflicted with the understanding of sustainability presented by the team and developed during the participant discussions in workshop 1, in the oral evaluation the project owners admitted that, under the pressure of the difficult situation caused by the covid-19 crisis, they had prioritised the socioeconomic aspects of sustainability in their proposal of future initiatives.

We acknowledge that design thinking has multiple further approaches that would allow participants and researchers to develop empathetic understanding in order to frame the design challenge, and inspired by that literature (Brown, 2008; dschool, 2020), Mister Wolf includes persona cards to stimulate empathy. The test showed a high level of concern for struggling community members, including tourism and hospitality operators and employees. With regard to non-human stakeholders, the test showed a certain degree of environmental awareness and concern and empathy for nature, although participants had less empathy for animals used for food. In future workshops, specific tools and activities could be designed to promote ethical thinking (Fennell, 2019) and deepen reflection on the nonhuman entities influenced by tourism activities; for example, reflections might concern the observed dilemma about pollution and profitability, and the conceptualisation by some participants of nature as being critical to human survival.

Creativity contributes to innovation, and the aforementioned extensive use of tools was included in Mister Wolf to support it. The ideas emerging in the Mister Wolf pilot (Steps 2 and 3) were not particularly creative. It is difficult to determine whether this was due to the local Jante Law mindset (Fuglsang & Sørensen, 2013), the individual participants, our capacity to trigger creative thinking, or the limited time. In order to address this challenge, facilitators with expertise in design thinking could be employed, more time could be allocated to the various activities, as suggested in some evaluation forms by the participants, and additional tools could be included. Our choice was to include an extra tutorial session and motivational videos highlighting particularly innovative projects, based on the suggestion by Vogel (2012) about the importance of sharing stories of change. Other tools and activities could include performance arts and role playing.

Finally, we proposed that Mister Wolf could contribute to a sense of empowerment regarding the complex issues of sustainability, in general and in times of crisis. Our test suggested that, although a lack of confidence was noted at one point, a short time after the project ended, the project owners applied for funding to continue working together and involve the local businesses—an aspect that, to a certain extent, reflected a sense of collective empowerment and possible practical consequences.

#### *Revised methodology and recommendations for future Mister Wolf workshops*

Table 2 shows the revised Mister Wolf methodology. The suggested time allocated for the participants' activities is indicated in italics. Among the proposed tools are the motivational videos (Step 4) and the sustainable network design canvas (Step 5) that we introduced during the pilot test. These are indicated with an asterisk in Table 2. Possible additional tools, indicated with two asterisks, could be included to stimulate deeper ethical reflection (Step 2), evaluate the innovative solutions (Step 3), and stimulate creativity (Step 4).

Based on the pilot test, we reflect on three factors that can be easily underestimated. Firstly, a considerable amount of *time and tutoring* is necessary for workshop participants to familiarise themselves with the proposed tools and activities. It is important to note that, although extra time and tutoring sessions can be included, this would require very high commitment from participants, which should be communicated clearly but might make the recruitment of participants difficult. Secondly, some aspects of the local *sociocultural context* might hamper creativity and make communication between the facilitators and the participants challenging. The facilitators' familiarity with the local culture is essential and, when necessary, it could be supplemented by the inclusion of a "cultural broker" who could help to develop and implement the various activities. Thirdly, *flexibility* is necessary to adapt the various activities and tools to the participants and their progress. This requires *dedication* by the workshop developers, since not all the work sessions can be planned in advance.

From a practical point of view, it can be useful to note that our methodology implies several costs and some of them, as the employment of workshop facilitators with expertise in theory of change and design thinking, can be quite high. Thus, Mister Wolf relies on the possibility to cover such costs, and this can limit its application to funded projects.

**Table 2**  
The revised Mister Wolf methodology.

	Steps	Objectives (in bold) and activities	Tools
		<b>Set the scene for the sustainability challenge</b>	
Understand, observe, define	1) Setting the scene	Team, project owners: discuss common grounds for collaboration, stakeholders' mapping, invitation to workshops Team: discuss contextual challenges, prepare materials	Power/interest grid
Ideate	2) Vision and creativity (workshop 1)	<b>Start developing a shared vision</b> Team: present central concepts Group work: value mapping (3–4 h) <b>Develop ideas about innovative solutions</b> Group work: identify innovative solutions (2–3h) Plenary: share ideas (1 h)	Value map, personas, Innovative solutions table, ** Tool for ethical reflections
Test	3) Test	<b>Test the ideas from workshop 1</b> Participants: share ideas with their network of colleagues and friends (2 weeks) <b>Elaborate a proposal for the shared vision</b> Team: analyse the W1 data, develop a proposal of a shared vision <b>Agree on possible changes to the proposed shared vision and innovative solutions</b>	** Tool for evaluating the sustainability of the ideas from workshop 1
Re-define	4) The innovative path (incl. workshop 2)	Team: present workshop 1 results, proposed shared vision, and theory of change Plenary: discuss the proposed shared vision and the innovative solutions from workshop 1 (1–2h)	Roadmap to change, * motivational videos, ** tool for creativity
Ideate, re-define, ideate, define		<b>Identify medium-short term outcomes and preconditions towards the shared vision</b> Group work: elaborate roadmap (3–4 h) Plenary: share ideas (3–4 h) Project owners: discuss further outcomes, changes, causal relations, pre-conditions, finalise the roadmap by assigning priorities and including ideas about initiatives (2 weeks). <b>Discuss proposed initiatives</b> Project owners: present the roadmap and the initiatives (1–2 h) Plenary: discuss (1–2 h)	
Test, re-define, ideate, define	5) The way ahead (incl. workshop 3)	<b>Elaborate a time schedule</b> Group work: elaborate a plan for the initiatives (3–4 h) <b>Write a report</b> Team, destination management organisation: write a report	* Sustainable network design canvas, Gantt chart, power/interest grid

## Conclusion

Mister Wolf is a workshop methodology that integrates the theory of change with design thinking and sustainable business models to enhance collaborative innovation for sustainable tourism. We have presented and discussed this methodology's theoretical background and development process, and the results of a test conducted within an innovation project initiated by a destination management organisation during the covid-19 crisis. Among the challenges that we identified were the limited stakeholder representation, a lack of creativity, time constraints, sociocultural barriers, and the need for high commitment from workshop participants and developers. Such elements were taken into account to propose a revised methodology and some recommendations. The pilot test also highlighted that a major challenge for sustainability, especially in times of crisis, might be severe concern about socioeconomic aspects leading to a consequent downgrading of environmental issues. This can be explained by the perception of environmental sustainability as a constraint rather than an opportunity, indicating an opportunity to highlight further the innovation aspect of workshops intended to contribute to sustainability.

Our study contributes to the stream of research that aims to fill the gap between design theory and practice for sustainability. Several theoretical frameworks, such as sustainable business models, exist in the literature, and more can be developed and adapted to the different challenges that businesses and communities face. Nonetheless, what is essential (and this study has strived to do) is to translate such ideas into tools and activities that can be used in collaboration with stakeholders to achieve practical outcomes. To make such potential outcomes valuable for a shift of the tourism sector towards sustainability, we framed the proposed tools and activities using a knowledge structure centred on change and participation. These aspects are of paramount importance in tourism due to their pervasive effects on host communities and nature and the driving need to find feasible solutions to the numerous sustainability challenges of the sector.

Mister Wolf has been tested only once, and can therefore be considered a prototype. More tests will be useful to identify possible improvements. We are aware that innovations (workshop methodologies included) require several rounds of testing, redefinition, and ideation to increase the probability of their success. This can be done in future studies that might take as their starting point our revised version of Mister Wolf and our final recommendations about time, context, flexibility, and dedication.

## CRedit authorship contribution statement

Giovanna Bertella: practice-based learning, collaboration, tourism

Sara Lupini: sustainability transformation, participatory action research, tourism  
 Cecilia Rossi Romanelli: workshop methodologies, theory of change, sustainable development  
 Xavier Font: sustainability marketing, corporate social responsibility, sustainable supply chain management, sustainable tourism certification

### Declaration of competing interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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