A Graphic Facilitation Retrospective
By David Sibbet

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Abstract
Graphic Facilitation is an interactive style of leading groups using large-scale imagery and displays. It grew out of a network of west-coast consultants in the 1970's who were inspired by the approach of designers and architects while problem solving and collaborating on projects. It has come to embrace a wide range of principles and practices that use creative media to help people to "see what they mean." This essay traces some of the early influences and strategies that have shaped the field, and how it has evolved to include influences from more psychologically influenced facilitation, storytelling, large scale collaborative practice and other approaches to managing group process.

First Practitioners
I first encountered graphic recording of group process in 1972 when the training organization I was working with, the Coro Foundation, moved into a building south of Market Street in San Francisco next to a consulting firm called Interaction Associates (IA). Led by two former architects, David Straus and Michael Doyle, IA was working on a special project called "Tools for Change" under a grant from the Carnegie Foundation. They were gathering examples of problem solving strategies that teachers could use with students, including ones used by designers and other creative professionals. Active group facilitation was one of the strategies they were very excited about.

The IA project attracted the attention of many innovators at the time, including people who were working with Doug Englebart at SRI on another project called the "Augmented Human Intellect" project. One of the SRI team was a facilitator named Geoff Ball, who had been researching the impact of group displays on productivity. His paper on "Explicit Group Memory" showed up at Interaction Associates, and contended that of all the interventions a person could make to support a group, having a working group display was the most important. The fact that it was shared, explicit, and graphic made it key in creating a lasting group memory. This idea influenced IA to call their flip chart records of meetings "group memories" and to promote facilitator/recorder teams as the preferred approach to group facilitation.

Co-incident with the IA and Ball work, another former architect named Joe Brunon was working with the Center for Social Change at SRI in support of Willis Harmon and Oliver

Markley's work. Brunon used graphics in the expressive, designerly way architects sketch out ideas, supporting creativity sessions at SRI that were far afield from design. He branded his approach "Generative Graphics" and wrote some articles about his work that influenced those new to this idea. (He went on later to apply this approach to family therapy and the mapping of family stories).

Another person who showed up at IA was an art/philosophy student from Stanford named Fred Lakin. He had been inventing tools for what he envisioned as a new breed of information communicators. One was a pegboard that would hold cards in place with a small suction pump system. Another was a magic marker holder that looked like a pen pallet. A third was a "wall scroll" that held the roll ends of newsprint upright, and then supported up to 16 feet of paper pulled out under a bar with little weighted magnets that held the paper in place by friction. He very much wanted people to try his tools and left them at IA as a test.

GROUP GRAPHICS IS BORN

In this context I was leading Coro's flagship program, a nine month long Fellowship in Public Affairs, which trained a select group of 12 fellows to learn from their own experiences in internships in city government and other organizations. Friday seminars encouraged the group to dig into their different explorations, and put together big pictures of how city government really worked. Being physically located next to IA, I and the other Coro staff were naturally influenced by their methods, and began to record some of their sessions on large sheets of paper.

One day I hung up two rows of newsprint in the conference room that we shared with IA, and began to diagram city government. Three hours and no breaks later the group had just experienced one of the most analytical and juicy seminars they had ever conducted, simply by recording boxes within boxes, drawing lines, and mapping what they knew on the diagram, with me facilitating. Something really important was going on with the graphics. The Fellows had discovered what many call "systems thinking."

Some coincidences uniquely prepared me to take to this new medium. I had always been adept at drawing. During my hazing week at Occidental College, seniors set out to humble the freshman. Among their assets was Terry Gilliam, the subsequent animator of Monte Python films. His large tempra paint posters were works of art, and made the senior events they advertised seem glorious. Not be intimidated, I and another freshman took up our class standard, bought paints, and challenged back with our own murals. Our first attempts weren't to Gilliam standards, but they were good enough that both of us ended up doing quad posters all the way through college—always reaching for that early standard of excellence.

I went on to became editor of Oxy's college paper and get a Masters in Journalism from Northwestern University and work at the Chicago Tribune. These experiences trained me in interviewing and listening for story.

Quad posters, plus journalism skills, plus the group memory idea quickly combined into "GROUP GRAPHICS". A short while later I asked to move Fred Lakin's wall scroll to the conference room. Later in 1972 Coro offered an initial workshop in Group Graphics for some of its alumni and a small group began digging into this new big picture methodology, a branch on the facilitation tree that seemed loaded with possibilities.

EXPLORATIONS OF VISUAL GRAMMAR AND EPISTEMOLOGY
Ball, Lakin, and I would talk a lot during those days. There is some debate about who first coined the term "Group Graphics®." All three of us used it informally, but I, through the Grove Consultants International (my company) subsequently trademarked the name. We began gathering all the known examples we could find of display frameworks that would be useful for group process. We collected examples of diagrams, matrices, lists, Venn diagrams, drawings, and mandalas. Coro experimented with collage, sociogramming, history mapping and many other processes. Lakin would bring in insights from Wittgenstein, the language philosopher, and leading edge technical ideas from Silicon Valley.

Ball wrote a Group Graphics primer in those early days. I wrote articles for Coro and guides for the Coro workshops. Lakin began trying to model graphic recording in software, convinced that graphics was the overarching language that would eventually include words, numbers, and digits. The ideas began to evolve rapidly, fueled by related theoretical materials.

Inspired by Alfred Korzybski's General Semantics ideas, those of us on the Coro staff were encouraged to avoid lectures and design "discovery" experiences in order to engage the whole learner. This orientation made it clear to me that group graphics was more than graphics. It was also dance, and story telling, since the facilitator was constantly in physical motion, miming the group and its communication with movement, as well as commenting on the displays, suggesting processes and the like.

A theoretical breakthrough occurred in 1976 when a friend of mine named Jack Saloma told me about Arthur M. Young. Young was a mathematician/physicist/philosopher teaching in Berkeley who was using graphics to describe the integration between physics and metaphysics, and had formulated an integrated framework for thinking about evolution called "The Theory of Process." Jack strongly advised I attend Arthur M. Young's Saturday seminars. Between 1976 and 1981, I began a focused investigation of visual thinking from a process perspective and developed a grammar for visual language called the Group Graphics Keyboard based on Young's process perspectives. To this
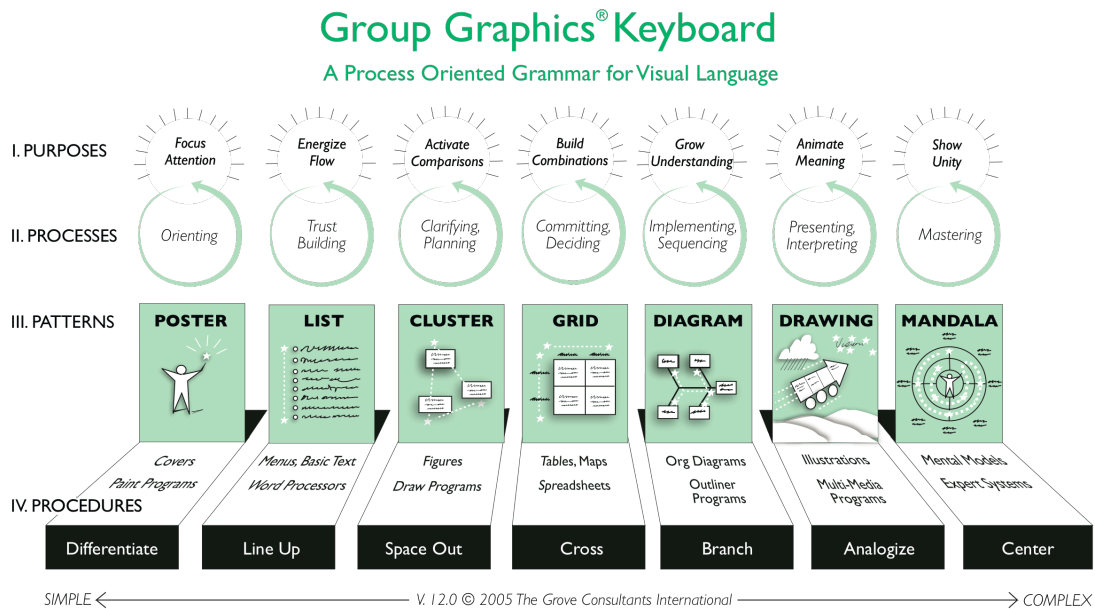
day process theory and the keyboard insights are among the foundational structures behind the current teaching of graphic facilitation.
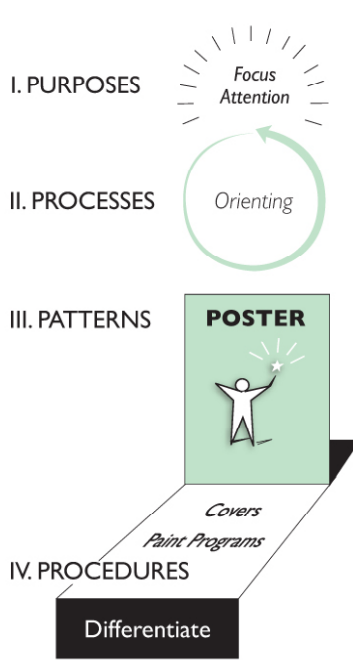
A GRAPHIC "KEYBOARD" EMERGES
Inspired by Young, I looked at graphics from a process perspective. Traditionally graphics have been appreciated as static artifacts and structures—such as a finished blueprints or drawings. Their elements are the lines, colors, spatial relationships, and patterns of connection.

One can, however, focus on a more fundamental quality— namely the process of how the graphic came to be, and the process one needs to go through to understand it. How do we look at things visually? What's the process by which people scan, focus, drill down, and zoom?

In looking at the *process* of drawing and creating visuals on charts, I realized that it is important to understand ALL the properties of the process, for these are the active ingredients that a graphic facilitator uses to help the group. It is very helpful to understand which patterns of movement are more fundamental than others, for the fundamental aspects repeat and nest into the more complex processes. Out of this thinking the Group Graphics Keyboard emerged, shown here in its 12th version.

Group Graphics® Keyboard
A Process Oriented Grammar for Visual Language

I. PURPOSES	*Focus Attention*	*Energize Flow*	*Activate Comparisons*	*Build Combinations*	*Grow Understanding*	*Animate Meaning*	*Show Unity*
II. PROCESSES	*Orienting*	*Trust Building*	*Clarifying, Planning*	*Committing, Deciding*	*Implementing, Sequencing*	*Presenting, Interpreting*	*Mastering*
III. PATTERNS	**POSTER**	**LIST**	**CLUSTER**	**GRID**	**DIAGRAM**	**DRAWING**	**MANDALA**
	Covers	Menus, Basic Text	Figures	Tables, Maps	Org Diagrams	Illustrations	Mental Models
IV. PROCEDURES	Paint Programs	Word Processors	Draw Programs	Spreadsheets	Outliner Programs	Multi-Media Programs	Expert Systems
	Differentiate	Line Up	Space Out	Cross	Branch	Analogize	Center

SIMPLE ←——————————— V. 12.0 © 2005 The Grove Consultants International ———————————→ COMPLEX

Let's zoom in on the process and understanding how the simplest processes you can use to create or understand a visual image, and carry it through to the most complex.
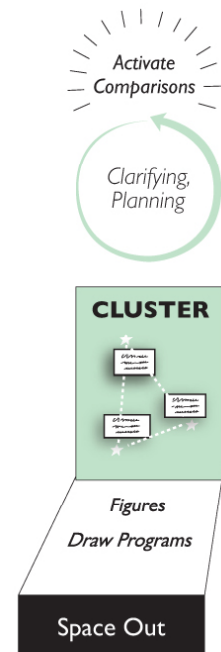
I. PURPOSES

Focus Attention

II. PROCESSES

Orienting

III. PATTERNS

POSTER

Covers

Paint Programs

IV. PROCEDURES

Differentiate

Young's theories suggested that the most fundamental element in any process is *potential*—represented in graphics by the simple focusing of attention achieved by a simple dot, or "*point*," often called a bullet point. It doesn't say much at its simplest manifestation, but attracts the eye. As I worked with my Group Graphic formats I realized that a "***POSTER***" format is also essentially about getting viewer attention, usually with one central, eye-catching image. It can embed other formats at secondary levels, but the overall design is governed by needing to differentiate from its context and focus attention. An icon on a blank sheet achieves this same effect. From the perspective of perceiving what a visual image means, the most fundamental cognitive act is focusing on something, getting snagged by a difference. Cognitive scientists have strong evidence that even our most basic visualization processes are driven by task orientation, or "intention" as Young might say.
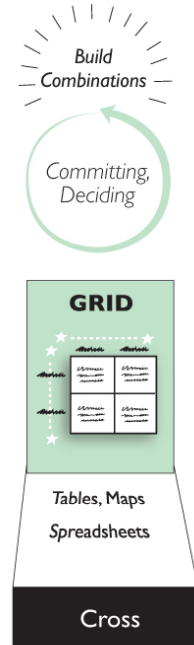
Energize Flow

Building Trust Tracking Data

LIST

Menus, Basic Text

Word Processors

Line Up

"What's the next simplest fundamental process?" I wondered. It's moving that point and connecting two points to produce a relationship called a "*line*." Perceptually, when one looks at a line one's eye moves one way or another to see what it connects, or what it separates. From a perceptual standpoint, a viewer is also moving his or her psyche when linking one thing with another. In our experimentation we found that line quality and body movement express the emotional quality of a meeting. Colors also express feeling. At a macro level the line archetype is mirrored in the "***LIST***" a format that flows in a linear fashion. It is such a simple format most don't even think of it as being graphic.

Activate Comparisons

Clarifying, Planning

CLUSTER

Figures

Draw Programs

Space Out

I knew from my own math study that three points make a plane. Three lines connecting them make a triangle. And three sticky notes on a chart will compel a viewer's eye to go from one to the other to the other trying to make a pattern, to get an "angle" on things and understand the relationships as a spatial pattern. Designers call this kind of display that simply spaces information with
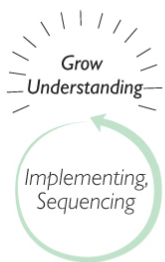
no connectors a *"CLUSTER"* map. We found that leaving out connections and simply juxtaposing information on sticky notes would activate a group's thinking. It seems there's something in the human brain that automatically tries to connect things that are next to one another. Understanding this format deepened my belief that seeing graphics as a process was a fundamental shift in thinking, for the meaningful aspect of this format is not just in the display, but in the interaction of the display with the viewer!
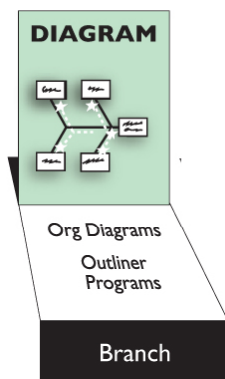
"GRIDS" were clearly next. There were all kinds that use this ubiquitous pattern—calendars, models, matrixes, data charts, spread sheets, budgets, maps, and criteria grids. I saw these were the formalization of the comparison activity begun in clustering. When brains start coming to conclusions, they think in related categories. Ah, this goes with that, ah, that goes with this. Crossing categories and seeing systematic relationships is the process supported by a grid. From a Group Graphics point of view, it is also the most constraining format. Unless the distinctions in the categories are clear, it's very difficult to fill in the spaces.

Young saw process through nature as building on one itself in a nested way. He asked us to assume this was true in our areas of expertise. So I looked for this pattern in graphic communication, and found it! The visual formats appreciated as different kinds of processes did the same thing! The simpler formats like posters and lists become the basis for the more complicated cluster and grid charts. It's possible to have lists in clusters, and list and clusters in grids. In addition, Young's theory explained that processes in nature often take on increasing constraints, up to a point, and then turn to regain some of the freedom lost in becoming more complex. Atoms become molecules and crystals, but regain freedom as they discover the organization pattern embraced by plants. This held true for graphics.

I saw in Young's theory a clue as to what is more complex than grids, yet freer to work with. Plants were next in Young's scheme, and all plants have branching patterns. So do most "*DIAGRAMS*"! In fact, a method popularized by Tony Buzan, from England, called Mind Mapping, was based heavily on the assumption that the human brain is uniquely set up to organize things in branching patterns. Branching diagrams have different characteristics than a grid. They can be much more complicated to read; they pack more in; but they are freer in the actual process of making them. You can branch anywhere, not just in a cell.

Animals in Young's scheme occupy the next evolutionary stage. And animation is one of the aspects of graphic facilitation that really involves and moves people, because the facilitator is continuously unfolding the drawing! Several years after first formulating the keyboard, I realized that conceptual animation occurs when the graphics themselves symbolically point at something the viewer already knows and the viewer projects movement back into the graphic. This happens when a graphic facilitator adds analogy and graphic metaphor to a graphic display and it turns into a drawing.

I now regularly transform large vision murals into "**DRAWINGS**" when I create landscapes of information in certain kinds of metaphorical settings, like a space voyage, a road race, or eco-system. Drawings turned out to be magical and complex worlds with the potential to catalyze amazing insights during group process. They became a bridge to story telling and other holistic mental practices. In the 1980's and 1990's designers like Jim Channon, Nancy Margulies, and their trainees evolved highly interpretive approaches to graphic recording that involved the use of elaborate drawings and illustration, and the groups they work with come alive within those visual constructs.

From the start of his work, I knew there was a pattern of ultimate complexity and inclusiveness that would conclude the keyboard. This would be the "**MANDALA**" or circular drawing, a nearly universal symbol of wholeness and unity. But for the brain to figure out how everything relates to everything in a central way requires the most amount of insight. It was a powerful way, however, to illustrate the group as a seating chart to suggest their implicit unity, or to illustrate mental models and theories. In a macro way, mandalas took the progression back to the point of it all—to see the world holistically.

The seven formats constituted an elegant "keyboard" of choices. "If the archetypal formats were a visual piano," I'm now fond of saying, " the live group recording is the composition, with all the possibilities that music provides."

 Since its formulation, hundreds of practitioners have tested this scheme, and have yet to find the need to add another major archetype. It seems that all graphic patterns are one or combinations of these fundamental processes.

Over the years, it has also become clear that these graphic patterns, artifacts of fundamental processes of creation and perception, are in fact directly connected to how people think at archetypal levels about any kind of organization. In 1986 Gareth Morgan wrote a wonderful book called Images of Organization, which explores how metaphors organize our thinking about organizations. When people say, "we are organized" they mean that they share a common conception how parts of the organization fit together in some integrated way. If you understand that this way of "seeing" is display making, then you can appreciate the enormous opportunities for organizational intervention and facilitation that the pioneers of graphic facilitation found when they began to work with a group's core imagery.

GRAPHIC FACILITATION MATURES
In the late 1970's, following my formulation of the keyboard, Sandra Florstedt, an OD consultant with Kaiser Permanente invited me to the OD Network to present the methodology in the late 1970's. Then in 1980 Florstedt, Ball and I offered the first public workshop in Group Graphics at Fort Mason in San Francisco. It was accompanied by a book I wrote called *"I See What You Mean: A Workbook Guide to Group Graphics"* that outlined a formal method for graphic facilitation. The book has been reprinted innumerable times and is the basis for workshops now being offered by the Grove Consultants International, its international affiliates, and many other independent practitioners offering graphic training. I re-wrote it in the early 2000's as *"Graphic Facilitation" Tapping the Power of Groups with Visual Listening."*

IA has matured to be a premier facilitation training organization. The Grove focused on big picture graphics and training in graphic facilitation and has emerged as a leader in graphic facilitation. The two companies referred students to each other and explicitly saw themselves as supporting the growth of a field.

Exemplary practitioners abounded and made the field real. One of the earliest was Jennifer Hammond Landau, a woman who came to the methodology herself through the Girl Scouts, and then discovered Group Graphics in Sibbet's workshops and became an early associate. She has been a leader in helping create the new International Forum of Visual Practitioners (begun my Leslie Salmon Zhu and Susan Kelly). Jennifer led the effort to have a Graphics track at IAF conferences.

In the 1980s Suzanne Bailey used graphics extensively through the education system's Tech Centers in California, then worked with the Group Graphics workshops for a while, helping formalize a hierarchy of skills related to the work. She went on in neurolinguistic programming and created her own consulting company the Bailey Alliance which has trained untold numbers in graphic facilitation methods.

Joan McIntosh encountered the method as a marketing manager of a software company, and sustained her interest while working at IA in the 1980's. She eventually became the marketing manager at The Grove Consultants International in the early 1990's and a leader of their graphic facilitation trainings, among other contributions.

Bob Horn, founder of Information Mapping, a company in Cambridge that first applied "information chunking" and other graphic strategies to text in the 1970's, attended the 1980 Group Graphics Workshop and has been tracking graphic facilitation and visual language since. He recently wrote a book called *Visual Language* that traces the larger history of text-graphic representation, with graphic facilitation as a subset. He believes that the tight integration of text and graphics is itself a new language, a visual language. In 1999 he was keynoter at the third annual Visual Practitioners Conference in California. More than 50 attended. All were making their living full time "working on the wall." The group speculated on how many practitioners there might be worldwide. Horn thought it was probably in the 10s of thousands by now, if you include all the variations.

An Emerging Lexicon
Following is a brief list of some of the practices now associated with graphic facilitation.

- **Graphic Recording:** refers to the act of transcribing a meeting using large display graphics and words without a lot of interaction with the group.

- **Graphic Facilitation:** refers to process combining graphic work with facilitation, sometimes in a team with a recorder, and often alone.

- **Graphic Process Consulting:** focuses on helping people design processes that integrate a lot of media in interactive ways.

- **Information Design**: involves the creation and integration of complex information in a visual format, usually on murals and posters. Many information designers work in traditional ways, but a growing number use graphic facilitation during the initial design stages to develop ideas collaboratively with clients.

The Author

David Sibbet is an organizational consultant and information designer whose applications of interactive, graphic communications to organizational visioning, change management, and process facilitation are inspiring a new generation of process consultants around the world. Sibbet and his team at The Grove Consultants International design, develop, and distribute tools for collaboration drawn from their own experience with strategic visioning, team performance, and graphic facilitation. Sibbet has clients throughout Europe and North America in many different sectors. In additional

to organizational work, Sibbet is long-term affiliate of the Institute for the Future in Menlo Park working to understand the impact of technology on organizations.

Over the years Sibbet has designed and authored a wide variety of professional publications and information graphics. In 1991 he wrote *GroupWare and Workplace Learning: The Transformation of Training and Education in the Knowledge Revolution*, for the Institute for the Future. He co-authored *Leading Business Teams; How Teams Can Use Technology and Group Process Tools to Enhance Performance*, in 1991 for Addison Wesley and contributed heavily to *Global Work* for Jossey Bass in 1994. Recently he designed a 75-year *Timeline of Management Practices* for the Harvard Business Review as a gift insert in its 75th Anniversary issue. He is author and designer of many of the extensive line of process management tools provided by the Grove.

Sibbet has a BA from Occidental College in Los Angeles and a M.S.Journalism degree from Northwestern. After working for the Chicago Tribune, he was Executive Director and Director of Training of Coro Foundation's northern California Center from 1969-1977. He founded his own company, The Grove Consultants International, in 1977, now located at the Thoreau Center for Sustainability in the Presidio of San Francisco.

Joan McIntosh is an organizational development consultant and trainer. Since 1988, she has built her consulting and training practice on a foundation of over twenty years of business management, marketing and operations experience in a variety of business settings. Joan works collaboratively with individuals and teams to help them clarify their vision and values, define direction and set goals, and reach for high performance. She is an expert in the application of advanced team performance tools, most notably the Drexler-Sibbet Team Performance Model and the Myers-Briggs Type Inventory.

Transferring knowledge and skills are a key part of each assignment. She is a Senior Associate with The Grove Consultants International of San Francisco and regularly teaches programs in strategic visioning, teamwork, facilitation skills and graphic language tools and systems. Joan is also Adjunct Faculty at the University of St. Thomas in Minneapolis, teaching group dynamics.

Joan designs and facilitates conferences, meetings and retreats, to meet the specific needs of each leader, group and situation. She often brings Council" electronic meeting support technology to larger groups when productivity, inclusiveness and honesty are essentials for success. As a coach, she holds a deep faith in the power of individuals to be the architects of their own future.   She has a deep reservoir of experience and the interpersonal and communication skills to help individuals clarify and express their unique contributions.

Joan has worked extensively in the private and not-for-profit sectors throughout the US and abroad. To each assignment, she brings "new eyes" to look at the situation without preconceptions, and shares a wealth of experience about "what works." Her personal commitment is to be a true ally to those who manage the complex business of change.