Graphic Recording

Creating Community Engagement by Mastering Concepts Through Graphic Recording

For several years, Michelle Winkel worked with a California consortium of private, corporate, community and family foundations on a statewide project. In this case study, we focus on two particular murals because of their function they had for this client and the participants in the sessions we facilitated. These murals and the meetings in which Michelle drew them demonstrate the power of graphic recording to teach difficult concepts to diverse audiences by encouraging their participation in the dialogue. The following is excerpted from the book "Graphic Facilitation and Art Therapy" in which Michelle describes her experience.

In the first mural, *Performance Accountability*, the metaphor of a gymnast progressively learning to perform a cartwheel with the support of her coach parallels the performance accountability concept the facilitator needed the group to learn. The second mural, *Community Empowerment through Data Gathering*, also illustrates the strong educational component of the graphic facilitation process. It shows a vibrant town street scene with community residents going door-to-door, actively participating in shaping the programs they deem valuable for children in their community. Based on the facilitator's description of a local success story, the drawing developed during the meeting as her dialogue with the group evolved.

Background

In November 1998, voters in California passed the California Children and Families Act, an initiative that increased taxes on tobacco products, and thereby generated approximately $700 million per year in California. Each County received a portion of these funds based on the number of live births. They were mandated to put this revenue toward programs that improved the well-being of children aged prenatal to five, by preparing them to enter school physically, mentally, socially, and developmentally ready to learn. Counties set up commissions to dispense and monitor the way these

funds were used. Four of these County Commissions formed a partnership with a statewide consortium, known as the Foundation Consortium, to help them choose the best way to deliver these funds fairly to the programs in their Counties. The Foundation Consortium was a group of private, corporate, community and family foundations formed in 1991 to make and support policies targeting children and families based in Sacramento. They specialized in this kind of program monitoring and evaluation. This partnership—called the Results for Children Initiative—was the client.

The Results for Children Initiative (RCI) advocated for a governance model they called "Inclusive Governance", a model they challenged themselves to uphold and implement while monitoring the funds to programs across their Counties. A key principle of this governance model demanded bringing many solutions to the table, by drawing on the perspective of all stakeholders. For programs serving children aged prenatal to five and their families, the stakeholders consisted of funders and policy makers who provided resources and structure, service providers who brought skills to help solve problems,

recipients of services who knew what services they needed and how they should be offered, and residents who knew what their community needed. They argued that "Inclusive Governance" principles and practices would help achieve more equitable results for young children across ethnic, cultural, linguistic, and economic lines because they would be more likely to: identify equity as a desired result, to be aware and knowledgeable about strategies that work for different populations, to be able to use and interpret data to hold themselves accountable, and to be aware if certain programs weren't reaching certain populations .

In order to have inclusive governance, the client had to ensure a community model of equal representation. For example, the large Hmong population in the central California Valley around Fresno would need to be encouraged

to participate in the governing of these programs, as well as the large Latino population in each of the counties. The model also involved performance accountability. The Foundation Consortium asked the counties receiving funds to measure the results of what they were doing, which meant they would have to decide what they wanted to measure, who it would serve, and if the recipients would be better off in the end or not. To govern inclusively meant that no one program director could choose what to measure for the community. The goals and the focus of these meetings included: bringing everyone together to begin the process of choosing what to measure, deciding how to measure it, and then measuring it with participation from the communities involved.

The Client

Our client was the partnership organization created by the Foundation Consortium and the four County commissions, RCI. One of the lead facilitators knew our work and encouraged their Board of Directors to hire me. She convinced them that the diverse, multilingual, multicultural audiences invited to these events would need innovative modalities for learning how to run their children's programs, and that graphic facilitation provides exactly this.

The Request

I met with the Executive Director of the Foundation Consortium and one of her Program Directors to discuss my role in these meetings. They trusted the lead facilitator who had recommended my services and who would be taking a major role in many of these meetings. She had already asked about my interest in, and availability for this project, and felt it would strengthen the impact of the conversations having me drawing alongside the groups. The client planned several three day "academies" across the State in the coming couple of years to start community conversations about what mattered to them for children aged prenatal to five years. They proposed to maximize participation by reaching out to the diverse communities the programs would serve, and to explore the concepts of program development and evaluation. The Program Director explained to me that they had invited community leaders, service providers (such as

therapists, childcare providers, and nurses), parents and grandparents, commissioners and politicians. Each academy had a different vibe, based on its location and its attendees. I was to be the Graphic Facilitator for these academies.

Preparatory Meetings with the Client

After meeting with the Executive Director and Program Director, I had two meetings with the lead facilitator to prepare for the events. She helped me understand their objectives, explained some of the concepts, and agreed to send me background materials, such as policy briefs on inclusive governance models and recent strategic planning meeting minutes from the Board of Directors. We also went over the facilitators' agenda for the first event and decided where I might draw when multiple workshops were scheduled.

The Event

The first meeting I describe was a workshop within one of the three-day academies. A facilitator I hadn't worked with before, Denise, would guide a discussion about the concept of performance accountability. I felt somewhat uninterested in the subject because I didn't understand it at first. It seemed reminiscent of the latest trend toward solution-focused therapies dominating the managed healthcare market scene in California at the time. I felt nervous because many of the clients I had been working with as an art therapist had had valuable services terminated. I hoped this was not part of this trend.

When we were setting up for the workshop, Denise asked me to draw at the front of the room so that everyone could see and interact with me and the mural. Of the approximately 30 participants, most were Latino, with a few Caucasians, African-Americans, and Hmong. We had all just heard strong, welcoming, keynote speeches praising the work of the counties and programs, their vision and their commitment to the principles of inclusivity. People seemed happy and energized by coming together. The lovely setting——a mission style hotel on the California coast—provided a relaxing change for many who were leaving stressful jobs

and demanding family lives for a few days to participate in this event. Some had flown in, while many had driven from neighboring inland farming areas. We had perfect weather, and enjoyed coffee breaks outside on bougainvillea-filled patios.

Denise began this workshop I had been scheduled to illustrate by talking about what performance accountability meant to her. "There isn't a right or wrong way to do performance measurement work", she assured us, "but it has to make sense to you. You will have to explain it to others in your organization and to your funders. Do you think it will make sense to them?"

She was passionate about the advantages of the model, and how she had seen it work for community programs. It was also part of the funders' mandate, so it was important that the group embraced it and understood it as well as possible. Denise's goal was to teach the performance accountability concept to the group thoroughly enough that they could bring it back to their respective communities to teach them in turn. Upon implementing it, the programs could ensure continued funding. So Denise asked, "What is it? It's about being accountable to clients for the performance of the program. It's about knowing what you want from an activity, and seeing if you're getting it." I quickly jotted down this phrase on the mural just above the title (Figure III—upper left).

"We start with the fence drawing problem", she said. So I started drawing a fence. It made no sense to me. "We draw a fence around the thing to be measured. We want you to measure programs that have value to the people in your community. Do they have any value? How will you know? Is anyone better off after going through the program?" I was getting nervous, wondering how I could possibly draw this. My mind was blank. I started drawing a community centre inside the fence, knowing that was a common meeting place in most communities.

I began drawing while the group and I struggle to understand.

"It's a different way of thinking," Denise warned us. Next, she asked us to think about what was inside the fence. "Who do you want to help? Who are your customers? Clients? They are the direct recipients or beneficiaries of the service,

but also include others who depend on the program's performance, like the parents of children in a childcare program and the local elementary school where many of these children will enter kindergarten." With this statement, I boldly changed the building inside the fence to a childcare site, grabbing on to her first concrete example as I sweated in front of the slightly bewildered group.

"How about an ESL program?" someone then suggested. Denise was encouraging, nodding. I added an ESL sign to the childcare center. The mural was getting messy. I decided to hold off on drawing until the group and I came to a better understanding and consensus.

Denise went on, asking the group what services they would provide in this program, how would they know that the clients were better off after being served, or that the services were done well. The responses from the group generated a new path and understanding to the conversation. I drew their answers in the mural I am about to describe.

The Mural

On the far left of the mural sits a red brick building with a sign above its front door: "Gymnastics School, RCI, Ages 0-5". A young gymnast in a bodysuit performs a handstand, with legs straddled in front of the gymnastics school, supported by her coach who is holding on to her right leg, keeping her balanced. A balloon identifies this as "the program or activity". A protective fencing with an opening immediately in front of the gymnast and coach enclose the gymnastics school, which symbolizes the program.

The metaphor of the gymnast was not an immediate response to the session. I was learning about these concepts along with the group. I would throw out an idea for a metaphor that I thought might fit, but I knew from experience that I was looking for an "A-ha!" moment— something that would really resonate for the group and the facilitator. A couple of my ideas drew blank stares—not the cue I was willing to settle for. I suspect that my position at the front of the room put me in a hot seat which made the dialogue richer. The group benefited from seeing me squirm. Fortunately I am inquisitive. My questions normalized the

group's sense of curiosity and they tossed out ideas freely, to test on her. Denise commented on why each idea worked or didn't work. She asked the group if they understood. It was very collaborative and stimulating for all of us. It was also more memorable for the group- they felt very included in the process. If I had explored the concept alone with Denise, and then pre-planned the mural with her, I don't think the group would have learned as much. It certainly would not have been as dynamic. The small group size also helped create this possibility of a dialogue between Denise and the group.

Around the perimeter of the fence, I drew four subtitles on the mural: TRANSPORTATION, HEALTH CARE, DENTAL CARE and EDUCATION, symbolized by a school bus driving, a band-aid, a happy, smiling child with a toothbrush, and a book. These describe four measures of school readiness to attend school, as described by Denise. On the bottom, left corner of the mural, between two fence posts, I wrote Denise's warning to take it slow, "Defining the fence can be complex. Work on one part at a time."

Viewers next see the young gymnast (Figure III--, lower left, center of mural) trying to do a cartwheel on her own. Pictured with her left foot and left hand on the mat, her right arm up over her head and her right leg kicking up in the air, she takes the first step in performing a cartwheel. The viewer gets a better sense of her position because of the shading drawn in black on the ground under her. Making images as three-dimensional as possible helps my murals come alive. Next, the gymnast advances to the second position in the cartwheel, a handstand with legs slightly straddled (Figure III--, center). Above her feet I wrote the number 8.9 in a box, to represent the gymnast's score out of 10 for her form and skill with the cartwheel. The adjacent words, "measuring performance" show the presumed judge or audience not depicted on the mural. Below her hands, a large box says "HOW WELL DO WE DO IT?", meaning "How do we measure the performance of the activity we are measuring?" In this case, we are measuring the gymnast's performance, which also reflects on the skill of the coach in teaching the young gymnast. The girl's toes pointed, knees locked, elbows straight? "8.9/10" would be the marks of a decent cartwheel, with room for improvement. Of course her score also reflects on the quality of the gymnastics school, RCI.

Next, we see the gymnast sitting on the ground facing us, hugging her knees. A bubble caption says "I want another coach", her thoughts at this moment. She feels the coach could have prepared her better, could have given her better instruction. She is obviously discouraged and has reached an impasse in her gymnastics. I decided to use an individual person (the gymnast) for the metaphor—rather than a program or agency—so that the group could enjoy and identify with a story throughout the mural. In this situation, the gymnast in a huddled position makes the viewer feel her sense of discouragement. Any of us might have felt the same if things didn't go as well as they could have, and we were asked to do better next time. Drawing an organization or agency would not have had the same impact.

Below her on the mural, a balloon says "program redesign based on data" (Figure III---, lower center). For any program to be successful, such as this gymnastics school, the coaches need to continuously adapt their coaching techniques to suit the individuals involved—in this case, this young girl. The data includes the score of 8.9 which she received for her cartwheel, and her motivation which has faltered because she has stopped practicing and is sitting on the floor. The coach stands underneath the "program redesign" bullet. Beside and above him, a cloud with writing shows his thinking: "How can we help these children better?"

The gymnast continues practicing cartwheels, and she is next drawn almost completing the cartwheel, with right hand and foot on the floor, left arm and leg in the air (middle center, right). Above her, a score of 9.3 indicates that her performance has improved since the last cartwheel. It also says "using the data!", implying that using the data of any program or activity will improve it. This story conveys that this girl is working with her coach, getting ongoing feedback to help her improve her form and skill at completing this move.

Finally, I drew her (Figure III---, far right, center) standing upright with legs straddled and arms over her head in a finished presentation pose, with a mark of 10.0 noted above her head. She has mastered the move. Above the mark of 10.0, I wrote "ARE THEY BETTER?" which conveys the need to continuously monitor if the children in these programs

are getting better: have the desired outcomes improved? Below her (Figure III--far right, bottom) I drew a cloud filled in with this concept: "OUTCOME ·the children grew physically, emotionally, and mentally stronger in a safe environment." The commissions are looking for these outcomes when they evaluate programs they fund.

Tracking the child over time is also important. A bullet in the center bottom says, "Track the child over time. How many practices did she attend? How many injuries did she have? Does she enjoy this sport?" (Figure III). The group, in consultation back and forth with Denise, came up with these questions to customize the concept to the gymnastics school metaphor. If the child had missed frequent practices, had injuries, or wasn't enjoying her lessons, that information would have to come across in the evaluation of the program. They were getting the hang of it. I watched the light bulbs turning on as the group felt more and more comfortable with performance accountability. The mural was helping it make sense to them. It was making sense to me now. Denise's final reminder, "Stay focused on outcome measures," is shown on the drawing in the upper right: a camera lens zooms into the words.

Second Event

I drew the next mural: "Community Empowerment Through Data Gathering" approximately a year later, at a different event. Approximately 75 people came, most of whom had attended the first event. After the previous time they had met, the group had taken away lessons, practiced them in their communities, and brought back their learning to share here. Denise, the facilitator of this workshop, is a petite, outspoken middle-aged Latina woman who was well-known in this circle for her pro-immigrant political activism. She was very passionate about her work shaping and supporting community programs.

Description and Interpretation of the mural

Mural 2: Community Empowerment Through Data Gathering
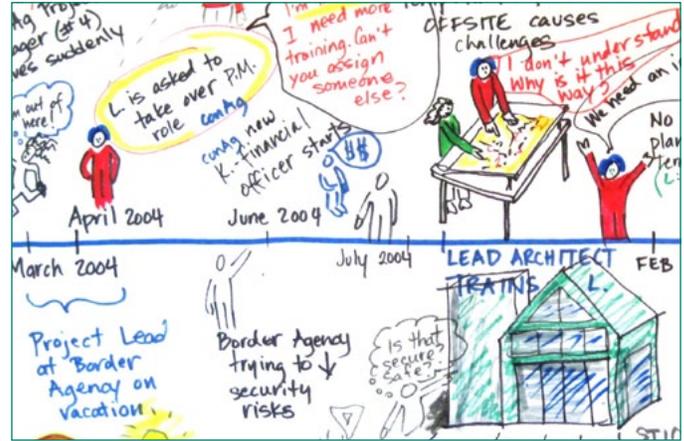
Detail: "Timeline Draft"

In this mural, I depict stories the facilitator shared about a successful data gathering project at a family resource center in one of the involved counties. A family resource center, that we will call "La Casa", receiving funds under this California Children and Families First initiative, genuinely wanted to implement inclusive governance and performance accountability into the fabric of their programs. The story of this center and their effort was provided for audience members who wanted to learn how to accomplish this in their own counties and programs. She wanted to bring governance closer to the clients, community, and service providers, by making sure voices that people typically left out of decision-making, such as people of color, residents of poor or disadvantaged areas, non-English-speakers, or young people were heard. "Let's push our comfort zone, everyone", Denise encouraged us. She asked us to think creatively about how to engage people we might normally never talk to about program development.

I was listening intently trying to find the right image to begin drawing. Fortunately, I was positioned at the side of the room this time, which made me more relaxed. I also felt comfortable with this boisterous group- a memorable bunch I was happy to be working with again. Denise began describing her recollections of the process. She described how 20 families in the community became part of a planning team to decide what data they should gather, from whom, and what it would mean to the community. They had also made community leaders and service providers a part of the team. A key concept of inclusive governance was soliciting

input from the people representative of the demographics of the community. Denise described how they altered their processes to be inclusive:

"We made sure we could have the meetings at La Casa after work when families could come. We held them in whatever language people needed- usually English and Spanish. We welcomed children and youth and offered fun activities for them in the room. These were not formal, quiet meetings! We always served food- it showed we valued the cultural tradition of coming together over food. We asked them to help us discover what this community wanted for their programs. What would make their children be better prepared for school at age 5? How would they know if they were doing better? What signs would indicate they were doing well?"

I quickly envisioned the neighbourhood she was talking about, with houses surrounding the family resource center, in walking distance. A street scene felt like the right metaphor- urban, dense, vibrant, like Denise described, with the hub centering on the family resource center. I began drawing what I pictured in my mind. I started with the two streets, and a large, humble building. On the mural (see Figure III.--- lower left) the family resource center sits at the corner of Cesar Chavez and Montecito streets, as shown by the street signs (Figure III---, center bottom). Under the sign identifying the building as "La Casa" it says STATUS CONFIRMED: "WORKING POOR". This is a reference to the fact that census data had described this community as "working poor" socio-economically. Data about the community also indicated that only 2.5 % relied on public assistance, and 26% rented a room rather than an apartment or house. (Figure III.---, center, and center right). In the center, left of the mural a tall figure wearing a tie stands on the top of the building saying, "Shall we include the old, white guy from Bakersfield?" The figure is pointing to a banner that says "AUTHENTIC INCLUSION", the phrase Denise used to describe the planning team's thinking process about who to include in the planning, implementation, and evaluation. Sometimes the voice of the old, white guy is not representative of the whole group.

Just above the figure on the far left, center, a figure representing the facilitator stands asking, "In who would you

like to see the greatest change? They collect the data." This meant that if the changes the community wanted to see were to be in youth, for example, the youth must be involved in the development and measuring of the outcomes. The planning team talked about the potential they saw in their youth who were going to the local college. They wanted to see them grow into leaders so they could advocate for change at a community and political level, and represent this community. They would collect the data. In the mural, you will see figures walking door-to-door, talking to residents, asking them questions, such as "Do you have any talents or skills you give the community? and "Do you vote?" (figure III—center, lower right). At the intersection of the streets, another figure knocks on a resident's door and asks "would you like to participate in a survey for the growth of our community? Quiere Usted participar..."(spanish translation). Denise discussed the importance of conducting all data collection in the residents' first language. The college students who had collected the data in the neighbourhood were bilingual and comfortable in both English and Spanish. Another figure, asks himself "How do we engage all residents?" (figure III—center, lower left) .

Sweeping up from the intersection of the streets scene (figure III-, center left) toward the upper right corner, I drew several overlapping circles. These describe the process of data collection La Casa used:

1. Establishing Team
2. Defining Boundaries,
3. Development of the research tool,
4. Develop a community,
5. Resource mapping,
6. Visioning workshops,
7. Implementation, and
8. Assessment, Evaluation, and Course Corrections.

This description of a step by step process was clear and provided the structure to add to the story Denise had told. These steps—along with the memory of how it had been done—would be a guide for the audience when they returned to their counties. I drew symbols in the circle for each step Denise described, to help explain the concept of each and to add visual interest. Underneath circle 8, I drew a scroll that

says "mapping our process" (Figure III,.---center right). The facilitator shared that the planning team kept mapping their process to help keep it on course.

The upper left of the mural shows some of the key questions the planning team pondered before embarking on the project. Several figures with palms up and shoulders hunched stand on a globe that says "TAKING ACTION". Cloud bubbles say, "Who has the answers?, What do we want to know?, To whom do we ask those questions, and Who's not here?". Again, these questions helped frame the process for the participants, so they could better prepare for their own data gathering process. This workshop was structured in two ways- one was a success story about an ideal scenario; the other was capturing and visualizing the story. Both were essential to providing participants with help implementing it in their own communities.

Comments

Just as Denise's description of residents going door-to-door in this mostly Latino neighbourhood made the data collection process come alive for the group, my mural took it to a new level. The street scene metaphor was a simple, accessible depiction of everyday life in this community. Data collection became less daunting and obscure and the concept of inclusive governance became meaningful to them. The families were pivotal to the programs, and were therefore pivotal to any data collection in this model of inclusion. What was so interesting about this workshop I drew, was that I saw reflected in the room this same inclusive model, with the exception of young children. Parents who participated in programs were watching me draw; they were not only part of data collection, but were now teaching it to others by being part of this event. They knew their voices mattered because they had had such positive experiences helping to design and evaluate community programs.

Concluding Thoughts

My graphic facilitation of these two meetings evolved into a process of teaching the group what they needed in order for them to actively participate in and govern their community programs. The power of graphic facilitation was multi-fold. Because I was as much a student as the participants were in the first example, my learning on the spot through drawing and choosing metaphors helped them deepen their engagement, their motivation to learn, and ultimately their understanding of the facilitators' concepts. My choices in metaphor were about simplifying difficult concepts. In the first mural, I used a person (gymnast) to symbolize a larger program to make it understandable to the workshop participants. In the second, I chose a street scene with the family resource center at its hub to convey the accessibility of the data gathering process. I conveyed the importance of the residents as integral to the success of the project, by including figures drawn in their homes participating and talking to the residents conducting the surveys. Participants in the workshop saw themselves on paper. The underlying message here was "your opinion matters and will help shape program design. You matter in this community."

Resources

www.ccfc.ca.gov

gfx3.fc.2424k.net/how/library/policybriefs/policy5.pdf

Leticia Alejandrez, Personal Communication, 2002

Judy Chynoweth, 2001
gfx3.fc.2424k.net/how/library/policybriefs/policy5.pdf