IDS PRACTICE PAPER IN BRIEF

Learning about an Alternative Approach to Strategic Discussions

This paper draws on the experience of the Knowledge Services Department of the Institute of Development Studies and the work of Mosaic Creative. While it draws on one event, ILT is interested in the wider use of graphic facilitation as part of intermediary processes.

Introduction

We have produced this practice note because in intermediary work, face to face group work is a common practice. In a recent IKMediary Network workshop the participants noted that as more and more information passes in front of people, long text-based narratives are difficult to engage with. A simple graphic is often much easer to engage with.

Whether working with intermediary services directly or the development sector generally, organisations need to discuss strategy with their staff and with stakeholders. Engaging with a significant body of information in a short retreat or workshop can be a challenge. Strategy documents are by necessity relatively long and in-depth. How, in a time limited workshop, can management get the staff or team engaged with the strategy without long monologues and PowerPoints?

In 2010, the Knowledge Services Department held a retreat to discuss its strategy. It brought in a partner, Mosaic Cretive, to facilitate the meeting using graphics. There is a growing body of work on visualisation of meetings, or graphic facilitation. This Practice Paper presents our experience in the context of a strategy meeting about Knowledge Services. Our experience suggests that graphic facilitation can enable people to engage quickly and effectively with complex ideas. This experience is supported by research evidence found in the literature.

In each Practice Paper published by the **Impact and Learning Team**, we share our experience and learning. We are presenting ideas that we are exploring and that others in the intermediary sector might like to explore.

Our experiences contribute to the body of knowledge, but rarely if ever contain incontestable insights. This paper should not be read in isolation, however, and should be seen as complementary to other work conducted on related issues of capacity development, knowledge management, and policy influence.

The knowledge and information intermediary sector comprises those who seek to improve flows of knowledge between actors in decision making and change processes in order to generate better development outcomes.

Intermediaries act in a range of ways: enabling access to information; helping people to make sense of it; facilitating connections that enable knowledge to be shared between stakeholders. It is a practice sector which cuts across other sectors.
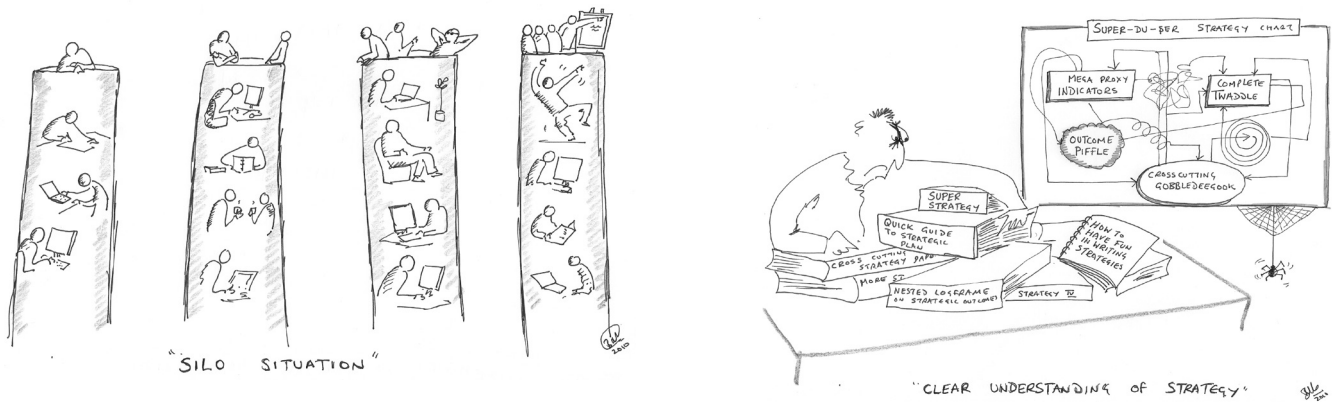
Overview of the day

The graphic facilitation approach, used by Mosaic Creative, with clients such as Christian Aid and International Rescue Committee UK, is to summarise the strategy document as a set of cartoons prior to the meeting. These cartoons provide the focus for the discussion. In theory they enable people to engage quickly with a complex plan, and to comment and be consulted on the essential elements.

The opening sessions were as one might expect – introductions to the day by senior management, and a brief introduction by the facilitator. In the opening by the facilitator, the emotions of people were acknowledged – that some people like to engage with away days and others find them hard work, whiles others are distracted by the work they could have been doing 'back at the office'.
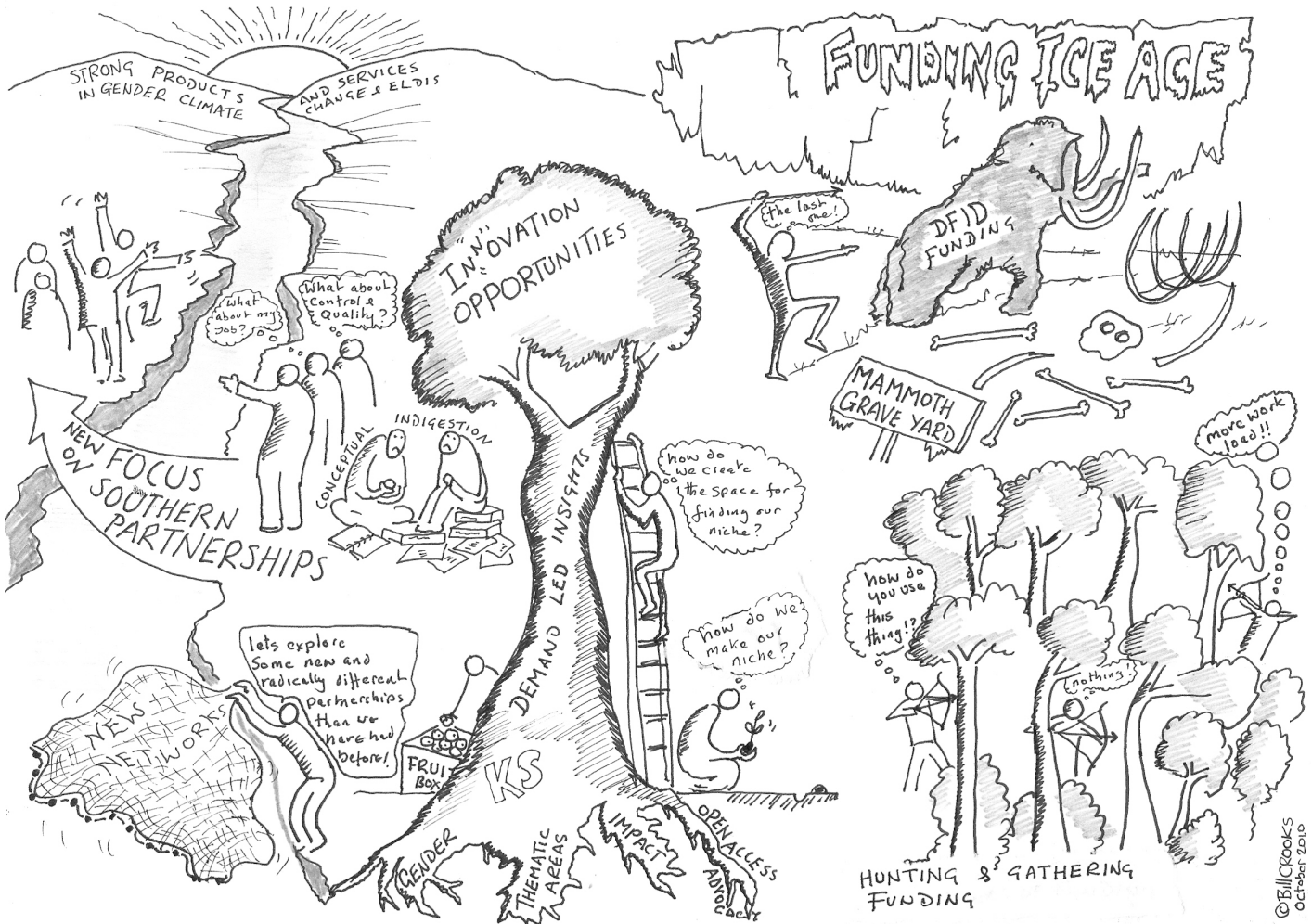
The introduction also covered expectations for the day, including a realistic acknowledgement that strategies can so easily be tools used by management without sufficient grounding and understanding in the implementation team.

The introduction also stated that the context was changing, and that the day was about significant conversations, not about completing a set task.

The introduction concluded by introducing the cartoon summary of the strategy and its context.

Without discussing the cartoom in detail, the participants were invited to get into groups, and to examine and engage with the it.

Review and discussion of mural on where we are now

The groups were each given an A2 copy of the picture, and were invited to add notes to it, to discuss the various components, and to apply or critique it according to their experience in the department. The feedback on the big mural including:
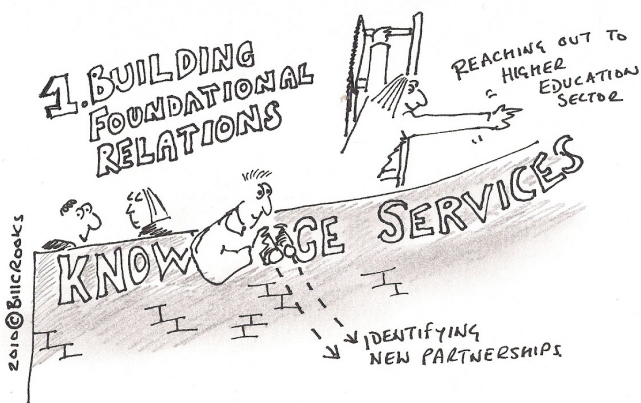
*   Highlighting that KS is addressing poverty

*   Emphasising the passion of staff working on poverty

*   Brought out that new skills are needed in KS such as fund-raising

*   Who drives KS – is it us or is it the funders?

*   Are we providing a service or a new approach?

*   The wider context of the IDS department is missing from our picture

*   Illustrate hunting and gathering in the forest with mini mammals moving fast – such as rodents – difficult to catch

*   Finding our way in the dark – both fearful and exciting

*   Outputs vs relationship development

*   Partners need to be more involved in our work

*   We need to move on and not get caught in the past

*   Are we just becoming funders?

It is not necessary here to go into the details of the strategy nor the relevance of the feedback. In this Practice Paper we wish to share our practice and experience, in order for the intermedairy sector to consider whether similar approaches may be relevant to their situation.

The key lesson from this opening exercise was the ease with which people were able to engage with the complex ideas contained in the strategy. The strategy and associated documents were 50 pages of text. If management had talked through the document it would have likely taken more than an hour. Due to the busyness of the staff, if the documents had been circulated beforehand, it is unlikely that even one half would have read them. If a text-based executive summary had been shared with the groups, discussion would have been delayed while the group read and tried to understand the summary.

Presentation of KS strategy in cartoons – discussion

After feedback and coffee, the staff engaged further with the strategy through a different set of drawings and a slightly different technique. The strategy has four areas. Drawings of each area were placed around the room, and participants were invited to engage with them as though in a market place.
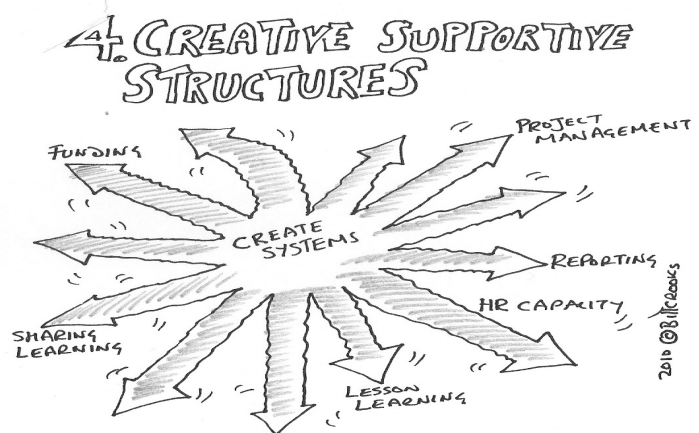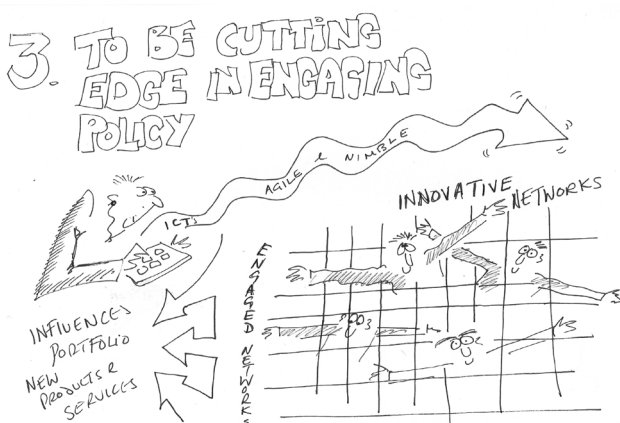

Initially Drawing 1, Building Foundation Relations, was not appreciated by the participants. Feedback included the need to show more illustrations around media, radio, journalists, newspapers, the need to show partnership as being give and take and that KS is working with other partners in a collective. The revised drawing has taken these comments into account and now sits as an A1 drawing on the wall of the department.

Drawing 2, Collaborative Working, was also criticised. 'Picture needs to be redrawn as a circular process not a linear one', 'Needs more about who do we involve in shaping debates and agendas', 'We need to think of other kinds of outputs other than written documents'.

These comments, directed at the 'drawing', enabled the group to bring out what was important to them. To state values and ideas that they felt were important, the idea that they saw themselves as people who shape debates and agendas.

Drawing 3, 'To be cutting edge in engaging policy', elicited the following comments: 'Engaging in policy processes

beyond business as usual such as working with others providing them with information so they can engage', and 'We need to influence donor agendas not just react to them'. These comments were not so directed at the drawing, but at the subject of the strategy.

Similarly Drawing 4, Creating Supportive Structures, had: 'Need to highlight efficiency versus flexibility', 'We need to improve our communication channels', 'We need to have a transparent structure and decision making', 'One organisation or many flexible systems'.

The day continued building on these insights to create a 'set of principles' that the department should use, to discuss partnership and how to manage it, and to discuss innovation. Innovation ideas were variously drawn and the added creativity of the opening of the day contributed to innovative presentations of the innovative ideas!

Learning from this approach

What if anything can we learn from the above experience? To discuss this we need to consider the wider literature. There are three dynamics in the above meetings, each of which has a growing body of literature to consider.

Visualisation-supported meetings

Graphic recording or visual facilitation has been around for a number of years, since the 1970s. However it is growing in demand as people become tired of PowerPoint (McGinn and Crowley 2010). There is a body of work on 'visualization-supported meetings'. In a recent experimental paper Bresciani and Eppler (2009) were able to show, using real managers, that 'groups supported by visualization achieved higher productivity, higher quality of outcome and greater knowledge gains.' The visualisations in question were pre-prepared, and embodied high-quality computer-generated graphics which visualised data or connections. The types of graphics included concept maps, mountain trail visual metaphor, argument maps, mind maps and flow charts, among others. Nevertheless the outcome of using these pre-prepared graphics was a greater productivity among small groups discussing a strategy.

Graphic recording

Recently McGinn and Crowley reported in the Harvard Business Review (2010), that 'For a big client meeting in April, Accenture senior manager Mark Papia hired a type of practitioner he'd never encountered before: a 'graphic recorder'. Graphic recording is not quite the same as the visualisation support discussed above.

The Accenture use was for recording the discussion as it transpired. During the session the artist created a large mural on 4ft by 8ft paper, to 'help people make connections and better recall points'. It is important to note that in purist graphic recording, the recorder is more an observer to the conversation capturing it in the same way a note taker or the writer on the flip chart might. Graphic facilitation is something slightly different, and can be more of an annotation skill. Graphic recording videos have become very popular through the RSA Youtube Videos which can be very engaging.

Sketchmarking or graphic annotation

Combining elements of the above, and techniques used in the KS experience, is a body of work called 'sketchmarking'. Here the participants in the group work are not just presented with a graphic to discuss. Also, unlike graphic recording, it is not a professional artist capturing their discussion. Rather in sketchmarking, participants are encouraged to 'discuss' by sketching onto the graphic. This potentially supports decision making through collaborative graphic annotations. In the paper of the same title Eppler and Pfister (2010) argue that the process of annotating or sketching onto pre-created graphics can 'elicit and capture interpretation processes, clarify basic assumptions, stimulate different perspectives, and extrapolate trends into the future'. They state that these experiences are under-researched and it is their experience as leaders in this field that has prompted us to document our own experience at the Institute of Development Studies.

Disadvantages of graphic facilitation

We are fully aware that whenever new processes appear they have costs as well as benefits. Bresciani and Eppler (2008) attempted to classify the disadvantages associated with graphic representations of information. Their review of the literature, and use of focus groups, results in a list of possible difficulties associated with graphics. The list includes cognitive challenges, sometimes created by the designer. This is where the thought processes of the designer do not match the audience. It can include designs that have an inbuilt ambiguity; it could be that the designer is breaking conventions. Other cognitive challenges include cryptic encoding, implicit meaning, inconsistency, over-complexity, over-simplification, and redundancy, among others.

The difficulties do not stop there. There are also cognitive challenges from the user's side. The user or audience might be resistant to change and choose not to understand the graphic; they might overload the graphic with meaning that was not intended to be there. Other user challenges are said to be channel thinking, difficult to understand, and misuse, among others.

Each of these cognitive challenges can also be found in written text or verbal speech. In the same way a graphic may have an implicit meaning, so too words may mean one thing to one person and a different implicit meaning to others. So while these cognitive challenges do exist, from our experience they are not significantly more challenging than in text or verbal facilitation.

There were also emotional challenges with graphics where the designer had made disturbing, boring or ugly images, and the user had seen them filtered through personal likes and dislikes and prior knowledge and experience. The researchers also noted social challenges, where hierarchy, exercise of power, turn-taking alteration, unequal participation, and cultural and cross-cultural differences were all documented disadvantages associated with graphics. Again most of these are common to any facilitation process.

In their paper, the researchers were attempting to bring a sense of reality to the enthusiastic designer. They point out that graphics can be costly, and designers can fail to consider the economic aspects of their visual creations. They suggest that there is a need for those advocating visual facilitation to consider some measures that might determine whether any particular methodology is fit for use. Such measures might include: efficiency (van Vijk 2006), effectiveness (Johnson 2004; Mengis 2007), decision quality (van Vijk 2006), and reduction of stress (Chen 2005).

Conclusion

This Practice Paper shares our very limited experience of a strategy day undertaken with graphic facilitation. For us, we found that people seemed to engage quickly with a complex strategy, and were enabled to articulate some of the core values for that strategy. The literature presents evidence that our experience is not an isolated one, and that visualisation, graphic recording and sketching (annotating), are all techniques that in the right circumstances can add value to group based discussions, leading to higher productivity, quality of outcome and knowledge.

Brief interviews with staff, three months on from the workshop, suggested that people had remembered the day and were able to bring out something from the day, often with reference to a particular drawing. While 'workshop recall' is not proof that the graphics were more effective than a verbal or text based session, combining our own experience with the research and studies quoted leads us to conclude that the intermediary sector would benefit from engaging more with graphic facilitation.

References and Further Reading

References for IDS Practice Paper In-Briefs are available via this link:
www.ids.ac.uk/research-teams/impact-and-learning-team/publications/bibliographical-resources
We will update the page as we become aware of new relevant publications.

Learning about an alternative approach to Strategic discussions

About the Impact and Learning Team (ILT)

What makes development research accessible, relevant or appropriate for people outside the research community? Does development research get its due in policymaking and practice? What would be value for money in research communication?

The Impact and Learning Team at IDS are interested in how communication of research brings about change - in particular, what happens when people and technology mediate between researchers and decision makers. We use the term 'intermediary' to describe people and technology acting in this way. We think they play a critical role in making knowledge accessible, relevant and responsive to demand.

The work we are doing in the Impact and Learning Team (ILT) is exploring and testing this assumption using action research. We support people to think about the difference they want to make as well as how they are going to go about it. We draw insights and approaches from IDS's history of research, and the fields of marketing, strategic planning and evaluation, and capacity development.

This Practice Paper is an output from our work.

Full list of papers in this set

Batchelor, S. (2011) 'Learning about analysing Networks to Support Development Work?,' *IDS Practice Paper In Brief* 1, Brighton: IDS

Batchelor, S. Gregson, J and Crooks, B. (2011) 'Learning about an Alternative Approach to Strategic Discussions,' *IDS Practice Paper In Brief* 2, Brighton: IDS

Ishmael Perkins, N. and Okail, N. (2011) 'The Large Conference Re-Imagined and Re-visited,' *IDS Practice Paper In Brief* 3, Brighton: IDS

Evangelia, B. (2011) 'Learning About New Technologies and the Changing Evidence Base for Social Science Research and Decision Making in International Development,' *IDS Practice Paper In Brief* 4, Brighton: IDS

Hogan, C. (2011) 'Learning about the Role of Culture in Research Policy Intermediary Work,' *IDS Practice Paper In Brief* 5, Brighton: IDS

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