

Introducing Graphic Facilitation and Graphic Recording

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Fusionary Thinking

Abstract. This paper is intended as an introduction to the emergent field of graphic facilitation and graphic recording (GF/GR), which is a field at the cross-section of art, education and training, organization development, change management, and psychology. GF/GR holds particular relevance to those interested in expanding visual literacy in the workplace. The author includes a curated history, sample exercises and examples to illustrate the benefits of and similarities and differences between graphic facilitation and graphic recording. The foundations of GF/GR emerged in the 1960's as a way to help organizations solve problems using large format group graphics and collaborative methods. Since its inception, various methodologies of graphic recording and graphic facilitation have been codified and taught. Inconsistencies in naming conventions, style and quality exist, however, between practitioners and trainers. Nevertheless, the field continues to grow in reach and relevance, particularly as technology provides increasingly accessible means to capture and share words and imagery. This paper is intended to help build understanding of the GF/GR field and appreciation for its potential impact on learning, growth and communication for individuals, groups and organizations.

Keywords: Graphic facilitation, graphic recording, group graphic design, scribing, sketch noting, visual mapping

Graphic facilitation and graphic recording are two arms of a relatively new professional field. The field is so new that, even among practitioners, naming conventions are under debate. The dual term “graphic facilitation and graphic recording” is used in this paper because of its frequency of use by visual practitioners and broad definition. The abbreviation “GF/GR” is used for brevity. “Custom chart work,” “visual meeting notes,” “sketch noting,” “scribing,” “visual mapping,” “data visualization,” “visual capture,” and “visual coaching” are all terms used to refer to similar or related practices (Figure 1).

The reader should be aware that the field continues to evolve. A description of the field at the current moment in time is like a single frame out of a motion picture that is still being filmed. As understanding of human creativity expands, and as the availability and use of technology is further embraced, the field will continue to develop. Some visual practitioners are already, for example, working solely with digital media as opposed to traditional paper and markers (Stern Harris, 2019).

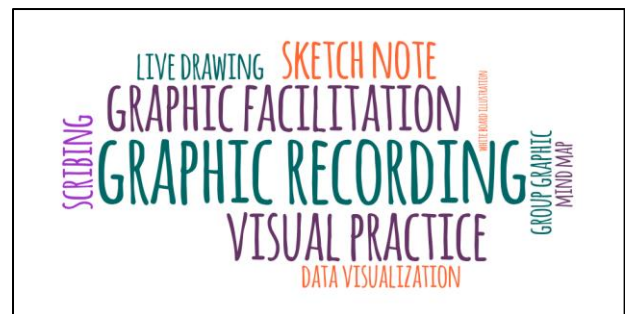


Figure 1: Terms used to describe graphic facilitation and graphic recording and related tools.

Graphic facilitation and recording is an important field for those interested in visual literacy. This nascent but fast-growing field has codified the use of visuals to drive individual and group process work, thereby making visual tools more readily accessible to facilitators, trainers, consultants, designers, group process professionals and coaches. From this visual practitioner’s experience, it appears that change-makers across business, non-profit and government sectors are beginning to harness the power of the visual to drive rapid innovation.

There are a variety of methodologies used to train GF/GR professionals, offered by a handful of organizations and individual trainers worldwide. The International Forum of Visual Practitioners (IFVP), a professional organization that offers an annual conference at locations around the globe, was the first organization created as a way for GF/GR professionals to stay connected and share best practices, tools and resources. Today, IFVP online followers number in the thousands. In addition, there are dozens of other social media groups that exist for a similar purpose.

The author, as a practitioner in the field, has witnessed countless moments of insight on the part of participants in GF/GR activities. She equates the solving of beastly problems for which com-mon thinking patterns are perhaps insufficient to the “taming of monsters.” The main intent of this paper is to share some of this practitioner’s insights into how the field of GF/GR is particularly suited to “monster taming” and to offer a glimpse into the future possibilities the field affords.

In this paper, a brief introduction to the broader context is followed by two self-led exercises. GF/GR is a highly experiential field in which facilitators and participants are expected to actively create or interact with the material presented. The exercises are included in order for the reader to more fully understand the potential of the field in a visceral way. Following the exercises is a discussion of some of the documented benefits of GF/GR, and an exploration of the field’s evolution to date.

The historical overview in this paper is not intended to be comprehensive, but rather a curated overview. Because GF/GR has grown out of a combination of fields, the exact origin of the concepts could be a matter of debate depending upon the perspective of the practitioner and his/her professional background and training. Like the classic story of the blind men describing an elephant based upon the part of the elephant he has experienced, there are currently many definitions of GF/GR.

Context

It is not difficult to convey an idea using pictures, yet in developed countries the world over, many adults insist, “I can’t draw.” Why? When the author teaches painting classes, many of her adult students cite receiving less exposure to art-making opportunities in their later years of education as a primary reason. Technology has also made it easy to find, copy and distribute images created by others or to take photographs, reducing the need to draw an original sketch, for example, which might be perceived as “unprofessional.” The drawing gap becomes even more apparent as soon as someone suggests playing a game where everyone will have to take a turn drawing in front of others. Adults who are willing to loosen their expectations for perfection can find these games fun and amusing. Those who vehemently describe themselves as “non-artists” may simply decline to play, deeming their contributions unworthy of even a friendly game.

Games aside, the need for people to be able to convey their ideas visually is both essential and fundamental. It only takes a traveler to a foreign land one incident to appreciate the value of visual literacy. When the local resident who does not share his language scribbles directions on a napkin to the nearest police station so our dear traveler can report his lost wallet and cell phone, the ability to interpret that map becomes a matter of critical importance.

Evidence of humans drawing symbols to represent something from life dates back to cave paintings created at least forty thousand years ago, according to archaeologists (Wilford, 2014). With successive technological advances (i.e., paper, the printing press, computers, personal printers, desktop publishing software, computer animation and the internet), image making and art has become easier to reproduce and distribute, but at the same time, more removed from the person making it. Direct human touch has gradually been removed from many forms of art.

Today, in some contexts, there seems to be a resurgent affinity for hand-drawn illustration. A quick Internet search for popular talks will uncover a wealth of videos accompanied by

hand-drawn whiteboard illustrations sped up to coincide with the narration. These are sometimes referred to as “whiteboard videos” and have become wildly popular for the amount of information that can be conveyed quickly in a way that is accessible. Former Secretary of Labor and CNN Commentator Robert Reich published *Economics in Wonderland: A Cartoon Guide to a Political World Gone Mad and Mean*, employing his own cartoon illustrations to make his perspective on a complex subject easier for readers to grasp (2017).

As new phones, tablets, computers and apps are designed, they are becoming more and more tailored to the many ways in which people think, including visual note-taking, emojis to represent emotion, and social media sites designed for organizing and sharing images and video. Just as people have become accustomed to sharing their ideas broadly and immediately through email, text and social media, there is a growing desire to include imagery. There is evidence that the visual attracts viewers. Marketing consultants such as Hubspot recommend adding videos or images to emails and social media posts, because the statistics repeatedly show that people are more likely to look at these than text-only messaging (Hubspot, 2017).

The visual is pervasive even in spoken and written language. Metaphors find their way constantly into everyday speech. In fact, everyday metaphors fill a powerful role in human cognition (Sweetser, 1992). Common examples are “elephant in the room,” “heart of gold,” “cold feet,” “weathering a storm,” “domino effect,” and “raise the bar” (see Figure 2).



Figure 2: “Raise the bar” metaphor illustration.

In addition to hand-drawn illustration, GF/GR is characterized by visual organization of complex material. With the flood of information that is currently available, consumers have little patience for information that is not presented clearly. Data visualization, information architecture and infographic design are three areas of expertise that have emerged in recent years in response.

Drawing is both ancient and current, both personal and universal. Many people go into the field of GF/GR after gaining expertise in creative fields such as graphic design, painting and illustration. Others are trained to lead group process work, such as trainers, coaches, and organizational development professionals before adding GF/GR to their toolkits. The learning curve can be steep for practitioners who take the leap to learning GF/GR — it takes courage to draw in front of an audience and it takes a profound kind of listening to truly hear what the speakers are saying. In addition, it takes skill and practice to quickly process spoken conversation and mirror it back to the group visually in a way that is organized and appealing. In the hands of a skilled GF/GR practitioner, however, the integration of visual and experiential work into group processes can prompt participants to make deeper connections between their own experience and the material presented. The graphic facilitator can propel a group into generating a wealth of useful ideas, harvesting them and/or shaping the ideas into an actionable plan.

Experiential Exercises

Following are two exercises designed to give the reader an opportunity to learn the nature of graphic recording and graphic facilitation first-hand. Both of these ways of working are highly experiential, engaging multiple senses and brain functions simultaneously. The second activity is best when done with a partner, or a recording device. The reader is encouraged to try them both in order, preferably before reading ahead if time allows. There are reflection questions to consider after completing both exercises.

Graphic Recording Exercise

To learn what graphic recording feels like, try the following ten-minute exercise.

1. Listen to a three- to five-minute talk, preferably recorded or on the Internet so that it can be replayed more than once. This can be, for example, a “how-to” video demonstrating how to repair an old window or an audio talk about presentation skills. It just needs to be interesting to you. If there is video, be sure it does not already contain hand-drawn illustrations that may influence you.
2. Grab a piece of paper, preferably unlined, and a writing implement. A pencil is fine, or you can embrace the risk of imperfection and use a black pen or marker.
3. Play the talk and listen carefully to it. It may help to close your eyes.
4. Play the talk again, and try to capture as many of the key ideas as you can on the paper. Think about how you place each idea in relation to the others, and how you might frame or show direction from one thought to another. Don't be afraid to use bullets or numbered lists.
5. After the talk is done, look back at your work and see if there is anything you can add for clarity or emphasis.

You have just done your first graphic recording! Next you can try graphic facilitation.

Graphic Facilitation Exercise

In this activity, you will employ guided meditation and a led activity to gain personal insight. This exercise is ideal with a partner. If working with a partner, decide who will be the guide first, and who will be the participant. Plan to switch roles and do the exercise a second time. The guide leads the meditation in step

one, then the activities in steps two through five. The participant listens to the guide's direction and draws or writes whatever comes to mind during the exercise. There is no right or wrong outcome. If doing the exercise solo, it would be helpful to record the guided meditation, and possibly all five steps.

1. **Five-Minute Meditation:** Sit in a comfortable chair, spine straight, feet on the floor, hands on knees. Close your eyes and breathe in and out fully a few times as you relax your muscles from head to toe. Focus on your breath. During this meditation, allow images, thoughts and emotions to pass in front of your awareness, but do not engage with them. Let them come and go as if scenes in your own personal movie.

Imagine you are traveling a path outdoors. You encounter a creature in your way. Your way is blocked, and you need to face the creature in order to continue on your journey. You get the sense that the creature means you no harm, and that there is something you can learn from it.

Get to know this creature blocking your way. How does it make you feel? What do you notice about the creature? What is the creature blocking you from? Why might you want to go down this path, and where does it lead? Turn in your mind's eye and observe the path that led you to this place.

Turn back again and thank the creature for this opportunity to learn. The creature gives you something. It might be something physical, a hint, an urge, or knowledge to help you on your journey. *There!* Pay attention to whatever popped into your mind. Lock it in with all your senses. When you are ready, slowly come back to the room.

2. Try drawing the creature in the center of your page. What path of yours might this creature be on? Draw the path, and label it with the title for whatever journey came to mind.
3. Somewhere at the beginning of the path, jot down "Past" leaving space above or below the word.
4. Toward the end of the path, write "Future," again leaving space above or below.
5. If you had any burning insights or images, add these quickly to whichever part of the "map" makes sense to you. There is no right or wrong way to do this.

If you like, spend time with each area of the page — honoring the past, identifying your current orientation toward the creature in the path, and brainstorming ideas and resources to help you build on what you learned from the creature in order to attain the future you want.

This exercise or a similar one can also be used with a group or team, where the creature is a significant challenge, problem or opportunity. When the author practiced this activity for the first time, she imagined a fire-breathing dragon as the monster. Then she pictured taming the beast so that she could harness its intense power for a productive purpose. Her six-year-old son suggested the idea of using its fiery breath to roast marshmallows. The true secret to taming a monster through GF/GR may well be to have fun with it! (see Figure 3)



Figure 3: Dragon roasting marshmallows.

Experiential Exercise Reflection Questions

What did you notice in doing these exercises? How might your experiences have been different if you had only written your responses to the talk and meditation versus drawing? What similarities and differences did you notice between the graphic recording and graphic facilitation exercises? What skills did you find yourself employing?

Defining Graphic Recording and Graphic Facilitation

If you completed both exercises, you likely noticed that graphic recording is primarily a listening and translation activity, whereas graphic facilitation involves interaction between the graphic facilitator and participant(s). The graphic recorder listens for key ideas, organizes information in a coherent way, and develops fast drawing skills. The graphic facilitator employs these same skills, and in addition, becomes fluent in leading group process work and presentation skills.

To summarize, graphic recording is a method of capturing core ideas using words and images in a large, colorful format, live and in real time. Graphic facilitation is an interactive process that is grounded in visual communication.

In business, people have become accustomed to seeing presentations enhanced with visuals (Figure 4a). The hand-drawn nature of GF/GR illustrations, in contrast to

photography and common presentation graphics, lend a slightly imperfect, uniquely human quality (Figure 4b).

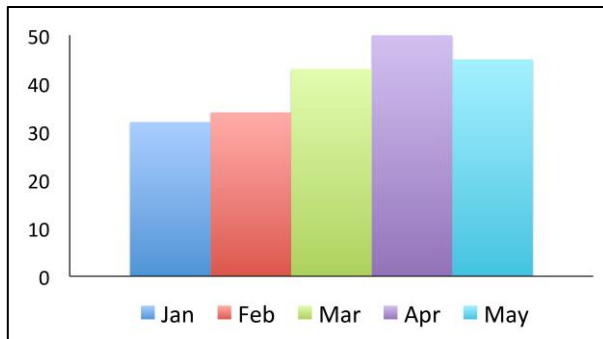


Figure 4a: Typical presentation chart.

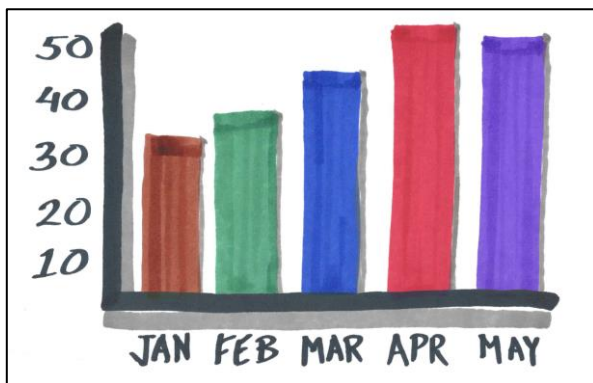


Figure 4b: Hand drawn chart.

The following discussion further illuminates the distinctions between graphic facilitation and graphic recording. More importantly, the author examines why and how these visual communication tools can benefit individuals and groups who engage in group process work.

Discussion

Live and In Person

By now, you have likely begun to form your own characterizations of graphic facilitation and graphic recording. What these two activities

share is the core concept of combining words, pictures and visual organization to make sense out of complex topics. David Sibbet (2006), one of the founding fathers of the field, lists three predictable benefits of graphic facilitation: 1) increased participation (engagement), 2) big-picture thinking, and 3) group memory (retention). From what we currently know about the complex system of mirror neurons in humans, people experience physical responses (muscle twitches) in response to watching certain kinds of interactive experiences, such as physical play (Fadiga, Fogassi, Pavesi & Rizzolatti, 1995). In other words, participants watching a person graphically capturing ideas in words and images (i.e., recording) will experience the “live” activity almost as if they were doing the drawing them-selves.

Graphic Facilitation as Connection-Starter

In one graphic facilitation session called “Painting Positive Change,” the author led a group of adults and teens through a sequence of exercises starting with simple, individual activities, building up to the most complex and interactive. The hypothesis was that simple, low risk activities would set up “quick wins” for participants, building confidence to try more complex activities requiring more creativity and/or personal sharing. The goal was personal insight that might be helpful when facing change.

The result was that the use of visuals helped participants think in ways to which they were not accustomed and to pay attention to each other more fully. For instance, toward the beginning of the session, participants were challenged to draw a single line that represented how they felt at that moment, and then share with the group. While uncomfortable at first, all quickly realized how simple and approachable the activity could be.

Next, partners took turns dropping a string of Mardi Gras beads and naming what the shape looked like. The whole group then stood in a circle and tossed a roll of twine in random order, unraveling it as we went, until everyone held a bit of twine. While tugging and pulling, raising and lowering, everyone used the twine to physically exemplify suggested words, such

as loose, tight, together, flow, jittery, bumpy, smooth, jazz, alive, and brainstorm. Upon lowering the twine to the ground, individuals then forced connections between the shapes they observed and the positive change they wished for themselves. In the discussion that followed, it became clear that all participants were fully engaged in the process, excited to contribute their ideas, and genuinely cared about each other's success. The sequences of action then reflection and solo or paired work followed by working as a group allowed people to build trust and expand their thinking.

During the main activities that followed, participants used watercolor and drawing materials to visually represent a personal change they wished to bring about. While many became lost in the act of painting, upon completion and reflection, most discovered useful and sometimes profound insights. One participant said, "Painting Positive Change' provided an opportunity for me to reflect before taking action in a thoughtful way. Most importantly, it provided space and good directions to map what's inside my head onto paper" (P. Scott, personal communication, August 29, 2013) (see Figure 5a).



Figure 5a: P. Scott painting. Reprinted with permission.

Leveraging the Unusual to Increase Engagement

In the previous example, participants tapped into insights they did not know they possessed. Graphic facilitation enabled individuals to address the challenge of a personal change using visual tools that were either atypical for

them, or that were used in unfamiliar ways. By alternating between creation and reflection, introspection and sharing with others, they were able to assign personal meaning to their visual creations in ways that made sense for them in light of their goals for the workshop. For instance, random shapes became symbols for important people or events. Seemingly insignificant decisions for how to connect pictures of past, present and future became pivotal insights when pressed to describe these decisions to the group. A circle that started as a simple shape became a hole, which transformed into a port-hole to a new life.

Just as David Sibbet described (2006), group participation was extremely high (some commented that the ninety-minute session was not long enough), and participants demonstrated big-picture thinking in their sharing of personal insights to the group at the end of the session. Because this was a session for individuals rather than a group of coworkers, there was no opportunity in this instance to record group memory over time. However, graphic facilitation built rapport and shared language quickly amongst a diverse group of people, as evidenced by the continued interactions of participants and follow-up conversations with the facilitator after the session.

Recording a River of Ideas in Real Time

In graphic recording, the graphic recorder plays the role of active observer while someone else facilitates the activity. While the graphic recorder's role appears more passive than that of a graphic facilitator, the impact on participants is similarly engaging. There is also an enormous benefit to seeing the whole of an event emerge visually in front of the observers' eyes.

One dramatic example is the "Arts and the Brain" conference (September 22, 2017, Worcester, MA) for which the author graphically recorded a series of speakers. The conference, hosted by [VSA of Massachusetts Open Door Arts](#) and the Seven Hills Foundation, focused mainly on the impact of the arts on patients who experience traumatic brain injury (TBI). Keynote presenters included a visual and performance

artist who continues to struggle with memory and other cognitive issues related to his TBI, academic researchers, scientists, and medical professionals. The graphic recording documented the structure of the day, speaker names, and many of the speakers' main talking points, along with drawings representing some of the visual metaphors and ideas that resonated with the group (Figure 5b). During the final session, one of the participants who struggles with memory due to TBI was effusive about how helpful she found the graphic recording, because it served as a ready reminder of the day's events, helping her to imprint the memory more effectively.

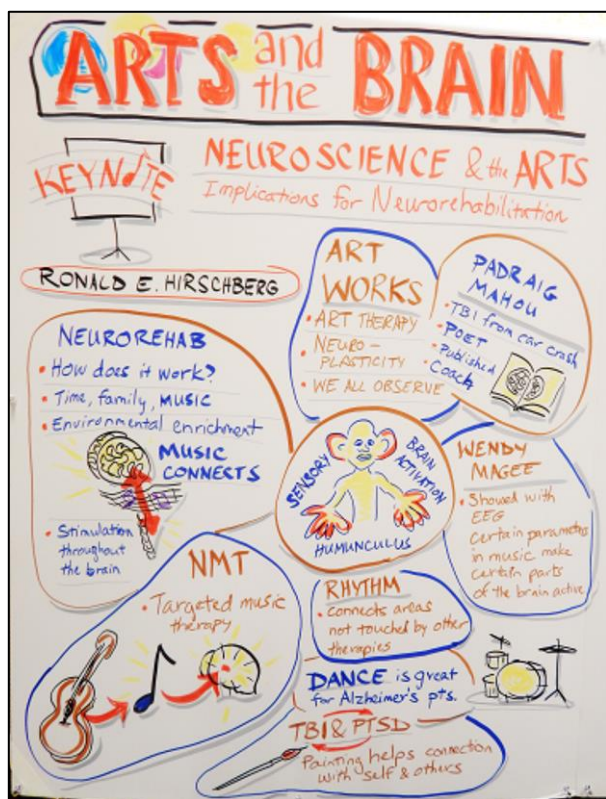


Figure 5b: Fragment of a graphic recording from a conference about the arts and traumatic brain injury (TBI).

Even for people who do not suffer from traumatic brain injury, it can be difficult to absorb dense material and stay engaged for long periods of time. When a graphic recorder captures the content of the material as well as group discussions on large paper posted

around the room, people are able to make connections across discussions. Two consultants who work in large organizations have noted that adding graphic recording to their training sessions aided in participants' engagement with the complex concepts, resulting in more thoughtful discussion and quicker adoption of the material (Weisman & Simos, personal communication, January 28, 2013). One participant was overheard describing the training as "drinking from a fire hose" and expressed appreciation for the quantity and attractive quality of the information captured in the graphic recording (Figure 5c). She referred to it frequently during the conference.

These stories are anecdotal, but representative of events the author, as a visual practitioner, hears and sees repeated whenever she takes out a sketchbook at a group event or meeting, and by other graphic recorders worldwide. Increased engagement of participants through live interaction and atypical methods, connections between people and ideas, and memorable events — these are a few of the reasons why organizations are employing GF/GR practitioners in increasing numbers.

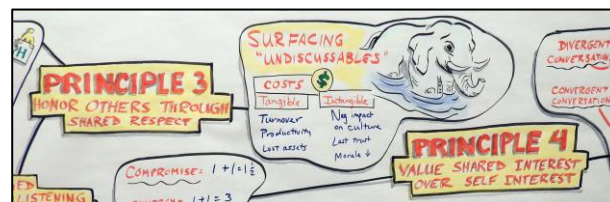


Figure 5c: Fragment from a graphic recording of a corporate training event.

Evolution of GF/GR

Where did GF/GR come from? The field coalesced in the 1960s and 1970s in San Francisco when a group of architects and designers borrowed from the techniques of their creative professions to work with other groups. The idea spawned in part from research conceived by Doug Englebart and facilitated by Geoff Ball, sponsored by Stanford Research Institute (SRI), which found that visual display was *most important* to "working group memory"

(Sibbet, 2006). Michael Doyle (author, “How Meetings Work” and co-founder, Interaction Associates) further influenced the field of planning and development, particularly in large, international organizations, through the integration of collaboration, creativity and intuition (Doyle & Straus, 1982). It is possible to describe the field as having two interconnected strands, like a model of DNA. One strand focuses more on the creation of a visual artifact (graphic recording or scribing). The other delves deeper into leading a group through a process of learning, planning or change management (graphic facilitation).

In architecture, a “charrette” is a working meeting in which the stakeholders all gather to map out and plan the various phases of a project. The value of seeing the entirety of a project constructed live and in person and gathering the input of a variety of the project’s stakeholders and “content experts” is easy to imagine. David Sibbet, founder of The Grove Consultants International, his colleagues at the Coro Foundation and Interaction Associates, Matt and Gail Taylor, founders, Collaboration for Impact and others applied the large paper format and diagramming inspired by the charrette concept to improve their facilitation methods. Even beyond the attractive and practical visuals created, they found the methods helped groups tap into their inner wisdom.

In the 1980s consulting boom, the early founders of GR/GR documented their facilitation tools and began to teach them. They developed standards for how to work with groups in this way as well as how to make group graphics effective, such as through the use of color, type and information organization. The success these visual groundbreakers found expanded to new forms and contexts. Jack Pearpoint and Marsha Forest developed graphic processes (MAP and PATH) to support persons with disabilities (*InclusionNetwork*, 2018). The World Café methodology for hosting large group dialogue was founded by Juanita Brown and David Isaacs (*TheWorldCafe*, 2018).

In the 1990s, the training field grew exponentially for both in-house and independent trainers. Changes in organizational leadership thinking and the emergence of change

management created opportunities for former Grove consultants such as Christina Merkley (West Coast, Canada) and Deirdre Crowley (East Coast, United States) to spin off their own practices. Others who have helped mold and shape the field include Kelvy Bird, Peter Durant, Diane Bleck, Brandy Agerbeck, Liisa Sorsa, and Disa Kauk. A handful of consulting companies also began to employ visual practitioners worldwide.

Around this time, a group of experienced practitioners formed the International Forum of Visual Practitioners (IFVP) to connect people doing this work. Peter Senge (1990), author of *The Fifth Discipline: The Art and Practice of the Learning Organization*, popularized the notion of group problem solving using systems thinking to convert organizations into learning organizations. This way of thinking, similar to that of the founders of GF/GR, was in stark contrast to a previous trend toward understanding large organizations as similar to machines that could be fixed simply by identifying and repairing or replacing whatever (or sometimes whomever) was “broken” or inefficient. The work of Senge and MIT Sloan School’s Otto Scharmer went on to launch the Presencing Institute in 2006, an “action research platform at the intersection of science, consciousness, and profound social and organizational change” which includes a Visual Practice Program (*PresencingInstitute*, 2018).

Where is the field heading? As the years march on into the twenty-first century, visual practitioners are infiltrating workplaces worldwide and bringing with them their unique talents, perspectives and ideas for ways in which they might apply graphic facilitation and graphic recording. An abundance of teachers means a range of quality and cost, and enormous variety of visual styles. Advances in technology have created opportunities for practitioners to project digitally captured recordings onto screens both in-room and around the globe simultaneously. Two-dimensional drawings can be turned into “explainer videos,” “white board videos” and animated storyboards. While the techniques and tools evolve rapidly and the arenas in which visual practitioners work appear limitless, the foundations of drawing and connecting with

others in heart-centered ways continue to ground the work.

Conclusion

The field of graphic facilitation and graphic recording is a relatively new field attractive to artists, teachers, organization development and group process professionals, trainers and coaches. At present, GF/GR practitioners can be found working as independent professionals and artists, employees of larger organizations, and members of consulting firms, for example. Most learn GF/GR in addition to their existing skillset. For a broad view into the experiences and perspectives of visual practitioners, see *Drawn Together Through Visual Practice* (2016), an anthology edited by Brandy Agerbeck, Kelvy Bird, Sam Bradd, and Jennifer Shepherd. What often draws people to the field is a desire to help bring about positive change in the world. The field is inspiring in that it requires of both facilitator and participants a sincere noticing, a deep paying of attention to what currently *is* and a creative approach to *what could be*. It is a field that is grounded in the ancient art of communication through pictures and symbols, and one that continues to evolve and adapt to current technology. In this respect, the field is contributing to visual literacy by engaging people in the workplace to rethink imagery as a vital communication tool.

In their practical application, graphic recording and graphic facilitation serve slightly different purposes conceptually and logistically. A graphic recorder is typically utilized as a listener and scribe to work alongside a lead facilitator. A graphic facilitator might be employed when a group wants to creatively imagine a new direction or expand thinking about an opportunity or challenge (see Figure 6).

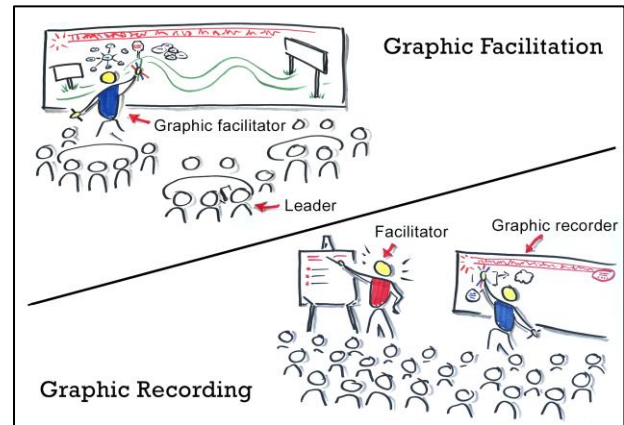


Figure 6: Distinction between graphic facilitation and graphic recording.

The tools and methodologies developed around GF/GR are particularly suited toward individual coaching, group process work, trainings and talks. When high-level thinking and engagement are required, GF/GR can provide an out-of-the-norm framework that can launch participants out of their habitual thinking ruts.

There are many areas of potential for research, including further exploration into the effectiveness of visual templates and interactive, graphical exercises on learning, problem solving and retention. While GF/GR practitioners intuitively know they are helping to unlock the tremendous potential for insight, more documentation and research would be useful to understand the ways in which GF/GR methodologies are most effective.

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