

# Visual Facilitation Report

by Zack Lee and Leva Lee

SOMETIMES, OUR IMAGINATIONS ARE SPARKED BY A *Visual* WHERE WORDS FAIL US

**NOTE**  
You do NOT need previous experience or have to consider yourself an ARTIST TO JOIN THIS WORKSHOP

**WHEN?**  
THURSDAY & FRIDAY  
SEPT 26 - 27 2013

**VISUAL FACILITATION WORKSHOP**

MICHELLE LAURIE NANCY WHITE

BROUGHT TO YOU BY BCCAMPUS & UBC

**WHO SHOULD ATTEND?**  
ANYONE who would like to engage OTHERS BEYOND WORDS

**HOW TO REGISTER?**  
AVAILABLE beginning June 2013  
CONTACT: LLEE @ BCCAMPUS.CA

**ATTENTION!**  
CLASS SIZE IS LIMITED  
REGISTRATION WILL BE ON FIRST COME FIRST SERVED BASIS

Image by Hilda Angraeni

## **Table of Contents**

<b>Table of Contents</b>	<b>2</b>
<b>Executive Summary</b>	<b>3</b>
<b>Planning and Approval</b>	<b>3</b>
<b>Communications</b>	<b>3</b>
<b>Facilitators</b>	<b>4</b>
<b>Materials</b>	<b>4</b>
<b>Venue</b>	<b>4</b>
<b>Registration Costs</b>	<b>4</b>
<b>Participants</b>	<b>5</b>
<b>Participant Feedback &amp; Follow-up</b>	<b>5</b>
<b>Appendix 1: Proposal</b>	<b>7</b>
<b>Appendix 4: Evaluation Responses</b>	<b>13</b>
<b>Appendix 5: Photos</b>	<b>19</b>

## Executive Summary

A workshop on Visual Facilitation was held at the University of British Columbia last September 26 - 27, 2013. It was a collaboration between UBC and BCcampus to provide a professional development opportunity for members of the post-secondary education community. The workshop was facilitated by Nancy White and Michelle Laurie, and was attended by 29 participants. According to the feedback, participants were highly satisfied with the outcome of the workshop and achieved their own professional development goals. This document is an overview of the planning and organization of the workshop.

## Planning and Approval

After querying the facilitators about their fees and availability, Leva and I discussed what UBC and BCcampus can contribute to organizing the workshop. It was proposed that UBC offer facilities, on-site support, and communications support, while BCcampus take the lead in communication with BC post-secondary institutions, collection of registration fees, and a contribution of \$1,500 to underwrite the facilitator fees and rentals. In-kind contributions included staff time other than mine and Leva's, which were rolled in with regular responsibilities.

A proposal was drafted and submitted to Michelle Lamberson, Managing Director, CTLT and Mary Burgess, Director, Curriculum Services and Applied Research, BCcampus. Both approved the proposal, which highlighted the already expressed interest in visual practices, the expansion of facilitation skills, the development of local expertise in this area and the overall benefit to teaching and learning.

See Appendix 1: Proposal for the submitted proposal.

## Communications

Initial communications were sent out to our respective contacts at UBC and at the post-secondary institutions across BC, mostly those known through UCIPD, the Educational Technology User Group (ETUG) and BCcampus networks. Personal invitations were sent to those who had personally shared their interest in graphic recording with us. The messages we sent included a link to the SCOPE community page (<http://scope.bccampus.ca/course/view.php?id=377>) with the workshop details, including a link to sign-up for an early-bird list. Those individuals on the early-bird list would be provided with the first notice of registration.

The timeline was very tight to ensure sufficient time to prepare for a late September workshop. Over the summer, informational emails were sent to our targeted networks and follow-up emails were sent reminding people to register. At UBC, specific departments who were likely to be interested in the workshop, such as HR, Museum of Anthropology, and Continuing Studies were sent targeted messages.

## Facilitators

*Nancy J. White*  
Full Circle Associates  
Seattle, Washington, USA  
(206) 517 - 4754  
nancyw@fullcirc.com  
<http://www.fullcirc.com>

*Michelle Laurie*  
P.O. Box 1063, Rossland, BC, V0G 1Y0, Canada  
(250) 231 - 0635  
[michelle.k.laurie@gmail.com](mailto:michelle.k.laurie@gmail.com)  
<http://michellelaurie.com/>

The facilitators fee was set at \$14,000.00, which included the fee for both facilitators and their expenses (travel, accommodation etc.). The fee also included all the class materials used and a student kit for each participant. We ordered a few extra supplies (felt pens) and had the added expense of the rental of 4 whiteboards to accommodate the high number students (29 participants). BCcampus arranged for a contract with Michelle Laurie's company for her services in the delivery of the workshop and Michelle arranged for the purchase of supplies and paid Nancy for her services.

## Materials

See Appendix 3: Materials and Pricing for more information.

## Venue

The workshop required a large amount of clear wall space without sockets and panels, at least 4' x 4' per participant. Rooms without carpeting are recommended for quicker cleanup as participants working with chalk pastels.

In case of limited room types, window panels can be used as substitutes for walls as long as they are large glass panels without frames. Poster boards can also be brought in as substitutes for extra wall space.

Seminar Rm. 2.22 & the Fraser River Room (Rm. 2.27) were used for two and half days, including setup and cleanup. Four 8' x 4' poster boards were brought in to provide extra wall space and accommodate more participants.

From the participants' feedback, many would have preferred to have everybody in one room in order to experience the whole group's and both facilitators' knowledge and energy.

## Registration Costs

Registration fees were set at \$500.00, which includes 2 full-day workshops, drawing materials, and some refreshments (coffee and cookies).

In order to operate on a cost-recovery basis, we set a 25-participant minimum for a total of \$12,500.00. BCcampus was prepared to contribute \$1,500.00 to cover any shortfall in the facilitator’s fees of \$14,000.00.

## Participants

A total of 29 participants attended the workshop, which was capped at 30. The majority came from other higher education institutions in British Columbia, which reflected our initial marketing and communications plans. Participants from the private sector were invited as we reached our registration deadline of September 5, 2013. Some of them have previously expressed interest in Michelle and Nancy’s Visual Facilitation workshop in Rossland, BC.

Below is a quick breakdown of the participant demographics:

BY INSTITUTION			BY LOCATION		
UBC	10	34%	Lower Mainland	19	66%
BCcampus	2	7%	Vancouver Island	2	7%
Other BC Post-Secondary	7	24%	Northern & Interior BC	6	21%
Other Educational Institution	2	7%	Alberta	1	3%
Government	1	3%	Minnesota	1	3%
Private	7	24%			
<b>Total</b>	<b>29</b>	<b>100%</b>	<b>Total</b>	<b>29</b>	<b>100%</b>

## Participant Feedback & Follow-up

A week after the workshop, an evaluation form was shared through Google Docs asking participants to provide feedback about the workshop and reflect on the workshop’s effect on their professional growth.

12 out of 29 participants completed the form with feedback being generally positive; the majority indicating that the session supported their professional growth. When asked how the workshop supported their professional growth, the responses were more diverse with the top 3 being: “prompted me to reflect on my current practice”, “introduced me to something new”, and “expanded my awareness”.

Participants have indicated that they liked the opportunity to move throughout the workshop, practice with their own drawing materials and on large sheets of paper, and being able to do something different than their own work. In terms of improving the workshop, they want more examples of visual facilitation

rather than drawing techniques, more practice alone and in small groups, and having everyone in one room.

See Appendix 4: Evaluation Responses for more detailed feedback.

Everyone was encouraged to join the RosViz facebook group (<https://www.facebook.com/groups/122858401095871/>), which grew out of the 2010 Visual Facilitation workshop in Rossland. It has now become a hub for all participants to share their work, practice and other resources. The SCOPE page (<http://scope.bccampus.ca/course/view.php?id=377>) also contained resources shared throughout the workshop and links to the photos taken during the two days.

Since the workshop, participants have shared many examples of how they have used the techniques they have gained. Below are some examples:



Visual Notes from ETUG Fall Workshop 2013



CTLT Pitchfest Pitch



Visual Notes from the Flipped Lab session on student workload.

# Appendix 1: Proposal

## Summary

Organize a workshop facilitated by Michelle Laurie and Nancy White on the practice of visual facilitation. The 25 - 30 participant workshop will be a collaboration between UBC and BCcampus. 10 spaces will be reserved for the UBC community (Vancouver and Okanagan) while the rest will be distributed to staff from BCcampus and other BC public post-secondary institutions.

<b>Project Owner</b>	Michelle Lamberson Managing Director Centre for Teaching, Learning and Technology University of British Columbia  kele fleming Senior Manager Centre for Teaching, Learning and Technology University of British Columbia  Mary Burgess Director, Curriculum Services and Applied Research BCcampus
<b>Project Manager</b>	Leva Lee and Sylvia Currie BCcampus Professional Learning  Zack Lee Educational Resources Developer Centre for Teaching, Learning and Technology University of British Columbia
<b>Project Team</b>	Leva Lee Primary contact for facilitators Community relations  Zack Lee Logistics at UBC Resource sharing and archiving
<b>Project Deadline</b>	Workshops are scheduled on September 26 - 27, 2013 (Thursday and Friday)



## Project Need

Visuals are used as tools to help us reflect on our past, imagine potential futures, convey complex ideas or analyze data. They can aid in starting conversations and in many cases, trigger the spark for deeper discussions.

Visual Facilitation is an immersive facilitation technique where participants draw, instead of simply talking about their own ideas and thoughts. It engages all three domains of Bloom's taxonomy of learning through the physical act of drawing, cognitive act of reflection and analysis, and the affective act of interpretation.

Several staff members of CTLT have expressed interest in learning more about visual facilitation and applying it to their own practice. Amy Perrault, Coordinator of Aboriginal Initiatives, has received interest from staff at the First Nations Longhouse about the workshop. Luisa Canuto, Manager of Faculty Programs has also identified departments within Faculties such as Arts, Science, Engineering, Medicine, and Continuing Studies who will be interested in a new tool to help students learn complex ideas. A Tech Express session on Visualizing Your Practice was facilitated last year, which touched very similar techniques, saw attendance from students (graduate and undergraduate) and staff.

Colleagues from other post-secondary institutions have also shared their interest in the technique. Some are already practicing the related practice of graphic recording or note-taking that produces a visual representation of a lecture or talk. BCcampus has fielded inquiries about visual facilitation workshops over the past 2 years. Interest has been generated by events such as the annual Online Community Enthusiasts or OCE meetings held in Vancouver facilitated by Michelle Laurie & Nancy White. Keen interest has also been generated by Nancy White's recent workshop at the JIBC in October 2012 and by the work of Giulia Forsythe at Open Education 2012 conference and by their work at sessions for Northern Voice.

A more structured and intentional professional development opportunity will enable members of the UBC community and beyond to build the capacity and extend the techniques of visual facilitation in their own context. It can be the start of different learning experiences for students where the creation of visuals complements their understanding of complex ideas.

<b>Goals</b>	Support the development of visual facilitation as an available technique for courses, workshops and projects in the UBC community and in other institutions of higher education
<b>Objectives</b>	Organize a 2-day visual facilitation workshop hosted at UBC for UBC community and those interested from BC public post-secondary institutions



**Alignment with UBC and BCcampus Professional Learning mandates**

Support the development of new facilitation skills locally that can be applied in a diverse range of disciplinary and cultural contexts

**Project Scope**

The project will be managed by the CTLT Professional Development team with some assistance from the CTLT Events Team for logistics support in conjunction with the BCcampus Professional Learning team.

**Strategies**

- Hold regular phone meetings with Leva Lee to coordinate BCcampus' contributions
- Pre-determine the number of participants from other institutions through individual invitations
- Minimize the event costs for organizers as well as registration costs

## Environment Scan

- Enables the UBC community and members of other post-secondary institutions to acquire new facilitation skills to be applied in teaching and learning
- Respond to needs/requests/interests for visual facilitation from community members
- This is a response by BCcampus Professional Learning to requests for workshop in visual facilitation

## Risk Analysis

Risk	Probability	Severity	Action to Prevent
Workshop continues without a minimum number of participants	Moderate	High	<ul style="list-style-type: none"> <li>• Scope out interest and rationale to post-secondary institutions</li> <li>• Open up registration to private sector with higher registration cost</li> <li>• Scope out registration minimums and acceptable costs to BCcampus:</li> </ul> <p>23 minimum paid registration = \$1,000 additional costs</p> <p>21 minimum = \$2,000</p> <p>19 minimum = \$3,000</p>

Risk	Probability	Severity	Action to Prevent
Interested participants will not be available during workshop	Moderate	High	<ul style="list-style-type: none"> <li>• Scope out interest and rationale to post-secondary institutions</li> <li>• Set final registration date with payment received by June 2013</li> <li>• Registration is transferable and write cancellation policy</li> </ul>

## Resource Requirements

Team Member	Task
Leva Lee	<ul style="list-style-type: none"> <li>• Manage the registration system</li> <li>• Communicate the workshop to BC public post-secondary institutions (other than UBC)</li> <li>• Coordinate with the workshop facilitators</li> </ul>
Zack Lee	<ul style="list-style-type: none"> <li>• Develop project proposal</li> <li>• Coordinate logistics with Sukhi Ghuman</li> <li>• Manage the budget</li> <li>• Communicate the workshop to CTLT/UBC community members</li> </ul>
Sukhi Ghuman	<ul style="list-style-type: none"> <li>• Book Facilities</li> </ul>

## Timeline

Tasks	Responsibility	Deadline
Contact facilitators to ask for quote and requirements	Leva Lee	February 2013
Develop project proposal for Kele Fleming, Michelle Lamberson & BCampus	Zack Lee, Leva Lee	February 2013
Submit proposal to Kele and Michelle and Mary	Zack Lee, Leva Lee & Sylvia Currie	February 2013
Finalize budget	Leva Lee, Zack Lee	March 2013
Finalize facilities booking	Sukhi Ghuman	March 2013
Finalize contract with facilitators	Leva Lee	March 2013
Setup registration system	Leva Lee	April 2013

Tasks	Responsibility	Deadline
Open registration system	Leva Lee	April 2013
Contact and invite colleagues at UBC and other post-secondary institutions through targeted communications	Zack Lee, Leva Lee	April 2013
Close registration system	Leva Lee	June 2013
Open registration to private sector	Leva Lee	June 2013
Finalize participant list	Leva Lee, Zack Lee	August 2013
Create feedback forms	Leva Lee, Zack Lee	August 2013
Workshop	Leva Lee, Zack Lee	September 2013
Release feedback forms	Zack Lee	October 2013
Finalize evaluation report	Zack Lee, Leva Lee	October 2013
Submit final report to kele, Michelle, Mary	Zack Lee, Leva Lee	October 2013
Follow-up with Participants	Zack Lee, Leva Lee	January 2014

## Budget

See Appendix 2 for proposed budget.

## Evaluation

- Solicit feedback from participants and facilitators about the workshop and its organization
- Create a toolkit on the basics of visual facilitation and when it is appropriate to use
- Create a report that summarizes the whole event and how it was organized

## Success Measures

- BC post-secondary community will apply the skills gained into our own practice
- Organize small workshops on visual facilitation
- Follow-up with workshop attendees on how skills are applied in the workplace by January 2014

## Sustainability

The primary objective is for BC post-secondary community to gain new facilitation skills that can be applied to a variety of situations and contexts. It is aimed to strengthen and expand our current facilitation services toolkit. No new programs or services will be offered.

The objective for BCcampus Professional Learning is to assist colleagues in post-secondary to develop visual facilitation skills and local expertise.

## Communication

Zack Lee will handle communications and reporting to CTLT staff during team meetings. Any documents, resources and lessons learned will be freely accessible on the UBC Wiki.

Leva Lee will coordinate communications with BC post-secondary institutions.

## Workshop Description

This experiential workshop takes place almost entirely at the drawing surface. We'll start by warming up our drawing muscles and silencing those pesky inner censors. Next, we'll build into the basic practices of visual facilitation and recording. We will pay attention to preparation, the actual visual work, and follow up including digital capture of paper based images. Lastly we'll be devoted to participatory visual approaches, practicing and giving peer feedback. You can expect to go away with icons, ideas and approaches which you can use immediately, as well as ideas about how to hone your practice.

## Links

<http://michellelaurie.com/training-and-workshops/graphic-facilitation-workshop-july18-20/>

<http://www.fullcirc.com/2012/06/05/rossviz-is-just-around-the-corner/>

## Photos

- RosViz: <http://www.flickr.com/photos/tags/rosviz/>
- MooseCamp 2012: [http://www.flickr.com/photos/webbedfeat/with/7399067408/#photo\\_7399067408](http://www.flickr.com/photos/webbedfeat/with/7399067408/#photo_7399067408)
- Online Community Enthusiasts Meeting 2012: <http://www.flickr.com/photos/tags/oce2012/>
- OER Forum 2012/Open Education 2012 Giulia Forsythe: <http://www.flickr.com/photos/gforsythe/sets/72157631801281572/with/8104571739/>
- ETUG Spring Workshop 201: Alan Levine keynote: <http://www.flickr.com/photos/61642799@N03/6352043148/in/set-72157628014161025/>
- OER Reuse: <http://www.flickr.com/photos/janinehirtz/5916104481/>

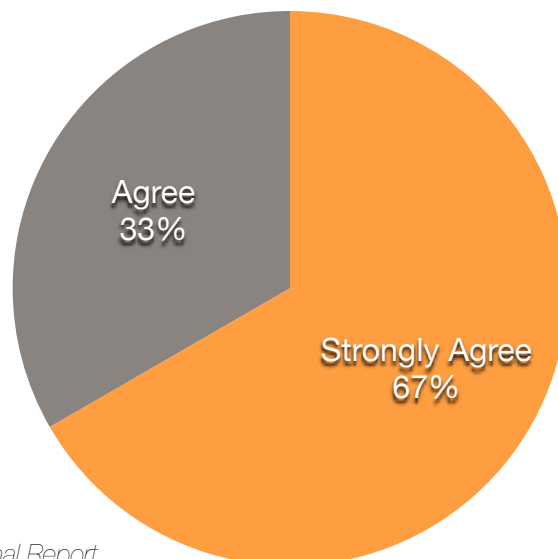
## Appendix 4: Evaluation Responses

### What were your expectations for this session? (Please be as specific as possible)

- I was open to whatever the workshop provided, but was hoping to learn some "takeaway" visual notetaking/facilitation skills
- To be exposed to visual facilitation techniques - and to find out in what ways using visual facilitation can strengthen facilitation.
- learn some practical basics for doing graphic facilitation/recording (and I would say this expectation was met 100%)
- Be introduced to a new set of tools. Even if I do not facilitate myself, to understand how VF is used and best practices etc.
- I wanted to get some exposure to visual facilitation, and begin to work with some of the tools and strategies.
- I hoped to get some basic understandings of how and where to use graphic facilitation and some basic skills I could add to my repertoire as a facilitator.
- That I would: - learn what tools and strategies work best for what purpose - improve my visual facilitation skills - leave with inspiration, and ideas to apply in my work
- Getting lots of practice, learning a few tricks of the trade around graphic note taking and facilitation.
- learn deeper facilitation skills - work creatively and collaboratively on a project - problem solve with templates and images
- To have hands on experience; to learn basic illustrating, about templates, use of colours, get new ideas and see others illustrating; and to have a great learning experience!
- To learn more about visual facilitation and actually practice how it might be done in situ.

### This session has supported my professional growth.

● Strongly Agree   ● Agree   ● Unsure   ● Disagree  
● Strongly Disagree



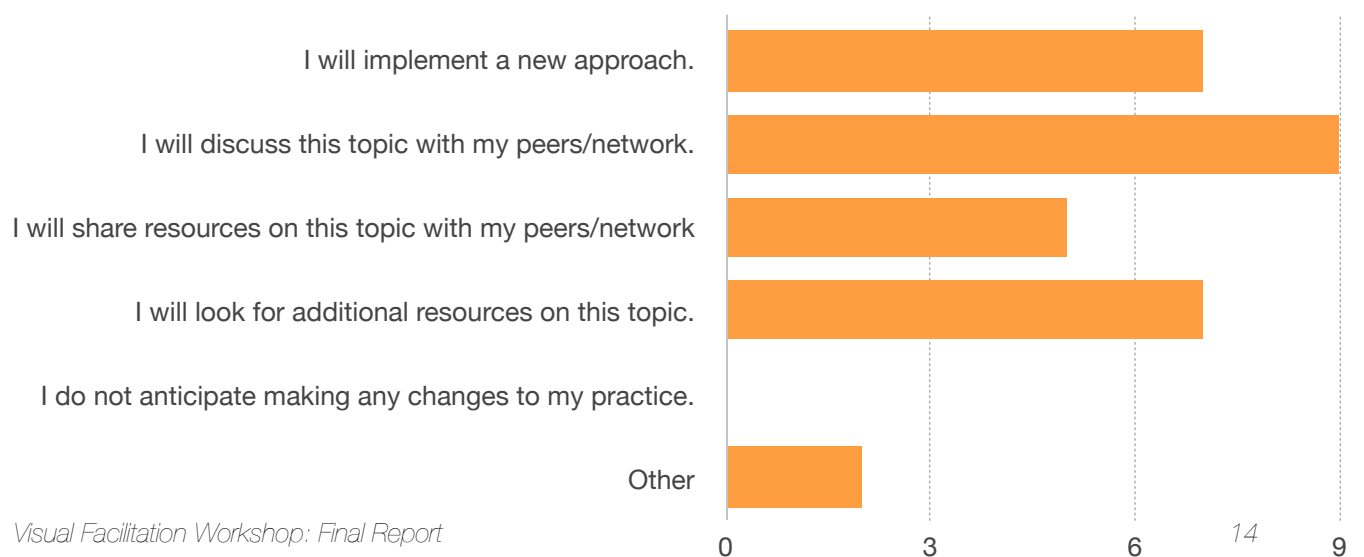
## If you answered Strongly Agree or Agree, let us know how this workshop has supported your professional growth?



## If you answered Unsure, Disagree, or Strongly Disagree that this event has contributed to your professional growth, please let us know why.

No responses.

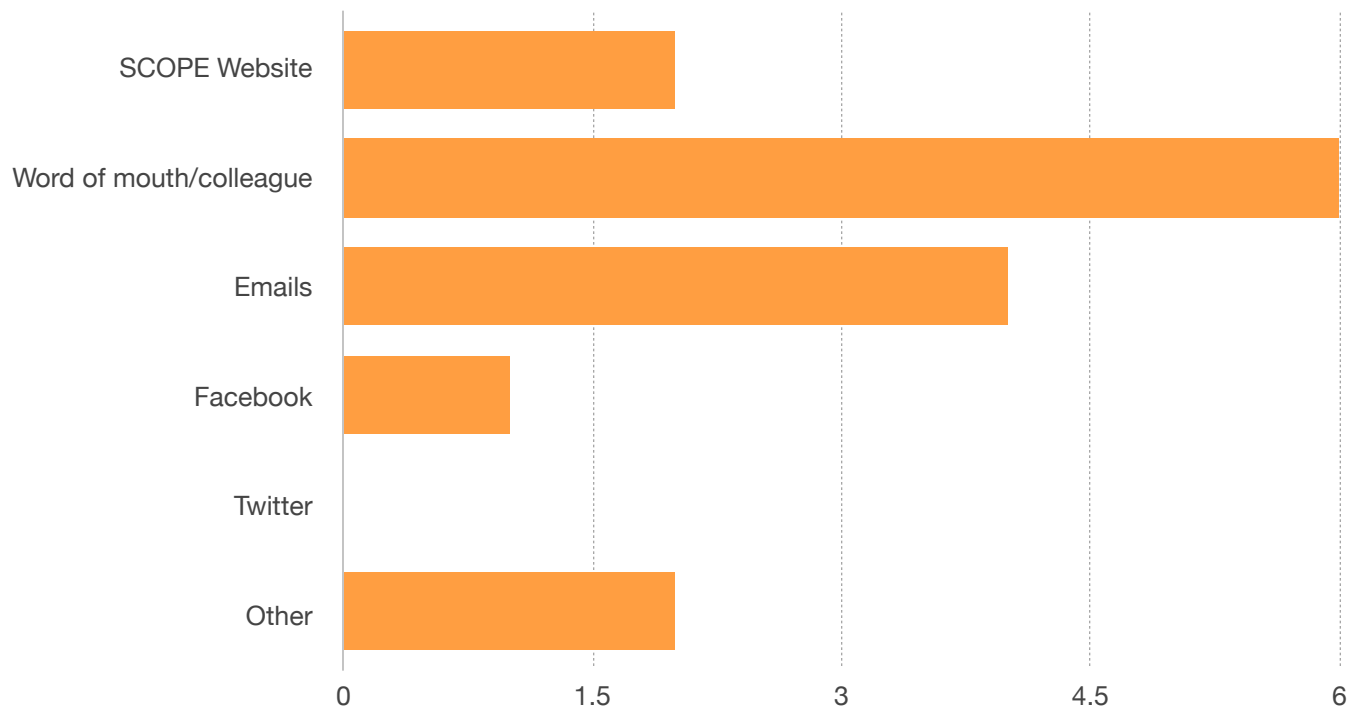
## What do you predict your next steps will be?



## How can we support you in your next steps?

- It would be nice to have a community here at UBC, where we share ideas, icons, perhaps do some low stakes facilitation, etc.
- Additional meetups or sessions in which we get to practice would be great.
- A follow up event? Online showcase?
- Something to bring the group together again to show what we have been doing, and/or to practice together.
- More opportunities to practice - maybe a UBC graphic facilitators listserv, sharing opportunities to practice, and opportunities to meet and follow up, as discussed at the end of the workshop.
- It's great having the Facebook site to get new information, ideas and see others' work. I might post some of my projects and ask for feedback.
- I love the idea of giving the opportunity to practice at upcoming events (e.g., Sylvia mentioned that there may be some opportunity to practice our graphic recording at future etug events). I'm not sure about the logistics of this but I am sure you guys will figure it out (e.g., suggest it needs to feel "safe" for us who are really new to this and may not be totally confident yet about having our work "out there", or people watching us do this live. maybe we could do it in a way that's not visible to the crowd at the time, and then have a "gallery" later where they are all displayed?
- share the links that were mentioned and continue to share ideas across the group
- I think right now, I can learn best by practicing, but I would be open to more related workshops in the future

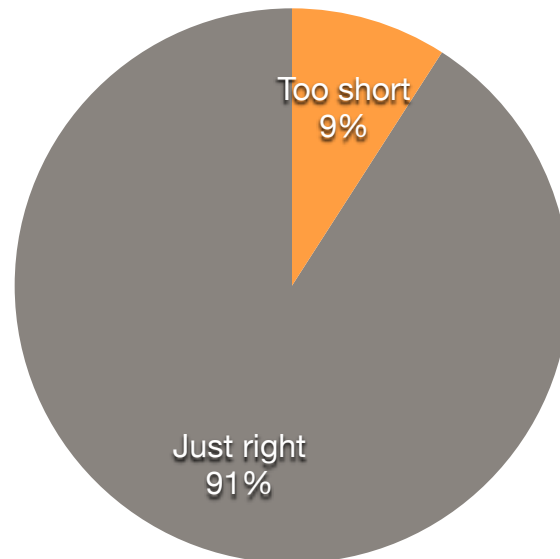
## How did you hear about the workshop?





## How was the length of the session?

● Too short    ● Just right    ● Too long



## What was your favorite thing(s) about the workshop? Why?

- lots of movement - provided us with necessary tools - right sized group for the discussion and demonstration - very collaborative
- Having the space, resources, encouragement, and opportunity to actually practice graphic facilitation.
- hands on practice
- slideshow of examples
- Nancy. She's an excellent educator.
- the opportunity to DO and practice lots, connecting with colleagues, opportunity to learn from Nancy White (she's so great!). Loved that we all got materials of our own to work with and take home
- The facilitators' energy and thoughtful planning.
- Getting my hands all coloured up, being apart of a dynamic group of learners, being totally engaged.
- Being hands on. Being pushed to do it --- in a supportive atmosphere.
- Practicing with giant sheets of paper on the wall. Without any expectations about how to actually go about it.
- Leaving the regular work behind and really engaging for a couple days. The schedule was so perfect -- kept us moving forward.

## What could we have done better to improve your workshop experience?

- one room so facilitators/instructors energy would not be split in to rooms, there for energy would be double in one room.

- Request that Nancy more explicitly discuss how visual facilitation, and her facilitation practice overall, operates as social intervention.
- snacks (such as fruit) provided
- from the logistics side, nothing - it was run really well, as always. the space worked. appreciate the price break too! I would not have been able to attend if it was full price. didn't mind having to get our own food and all that. Loved all the drawing activities, loved the icon jam, loved seeing others' work, loved getting feedback and hearing others' feedback (learned so much from that process). Loved that the "lecture" parts were short and visual. I wasn't as wild about the last half of the last day - the harvesting activity felt laborious for some reason, wasn't entirely engaged in it. maybe it was the team work, maybe I was just tired. would have liked another opportunity to create something individually to take back to my work (having had feedback on previous work that i wanted to apply)
- Can't think of a thing
- Nothing in particular.
- I don't know that the powerpoint slides really added much on either day. Sending them to us as a resource might be useful, but they were still an energy drag for me, and I don't remember much about those parts of the workshop (meaning that it had less impact). If you'd like to show samples from previous workshops, perhaps a running slideshow during breaks, and if space allows, even something running in the background while people draw if they want to look around for inspiration.
- More on books and other resources to continue down the VF path. The books may have been listed but I took the titles down --- the old fashioned way...
- I think the movement of participants between the two different facilitators could be managed a bit more. Both the facilitators were great, but had somewhat different skills - it would have been nice to plan the movement of participants between the facilitators with this in mind. It felt a bit stressful.
- Increase the number of days from two to three, and/or reduce the number of participants. Allow more time for individual and smaller group activity. Perhaps open up the space for personal practice for an hour or two before/after each day. if both rooms had natural light

## Will you recommend the workshop to a colleague? How so?

- I would, to anyone interested in graphic facilitation.
- Certainly! Word of mouth... I am excited about what I learned and experienced. It'll be easy information to share. Maybe I'll share an illustration or two, as well!
- yes
- Yes - anyone interested in the above topics that Ive mentioned.
- absolutely
- Yes - that it's a great starting session, and could be an intermediate session for people who already had some grounding in this work.
- Yes! By showing examples of what can be done definitely - word of mouth, and via social media
- Definitely; if it comes to Vancouver again, I will recommend it to colleagues.
- yes to my artistic colleagues.
- Yes.

## Please use this space to give us ANY feedback about the workshop. We really want to hear from!

- gracious hosts, and great facilitators. Thank you!!
- it was great!
- Well done!
- Thank you.
- It was awesome! Very well organized. Loved the facilitators
- Had high expectations for this course and was not disappointed. 2 intensive days yes. Dare you add on an optional networking lunch or dinner? I might have gone for that.
- On my way home, I certainly didn't need to ask myself the question "What did I learn?". Kudos to our fabulous facilitators, organizers and sponsors. I'm looking forward to a follow up session.
- Nothing more to add - just really appreciated the opportunity, and the chance to learn with the wonderful participants and excellent facilitators - Nancy and Michelle are terrific!
- I would have preferred to have more time on visual facilitation, and less of the basics on drawing, it was almost 3/4 of a full day dedicated to "How to" on basics of drawing that we all did at some point in our lives in school ... a focused reminder would suffice. it was fun but really I was hopping for more of V.F. practices.

## Appendix 5: Photos

Below are some of the photos from the workshop. More are available at <http://www.flickr.com/photos/choconancy/tags/ubcviz/> and <http://www.flickr.com/search/?q=UBC%20RosViz>. Photos were taken by Nancy White, Michelle Laurie, and Bob Mack.

