

REFLECTIONS, THOUGHTS and QUESTIONS

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I am a visual practitioner. I was introduced to the graphics field in the late 1970's and continue to pursue it to this day. I have been writing (and drawing) about the field since the mid 1990's. I was part of the little IFVP (International Forum of Visual Practitioners) founding group. I was on the first board of IFVP. I am on the board of IFVP Institute.

Recently, I was asked to write about my experience as a Graphic Recorder and Graphic Facilitator over the years. Even though it is my own personal experience, I think it might also serve as a taste of history. A lot of the story takes place in the San Francisco Bay Area.

I also have some thoughts and questions about us as fellow practitioners, our work and our future as a group.

One Person's Experience and a History

I started working for The San Francisco Foundation in 1975. I stayed there for almost 10 years. In 1979, the Foundation received a huge bequest of money after the donor died. The Foundation brought together about 25 community leaders to get their ideas about what the Foundation might spend the income of the trust on.

I came around the corner into the conference room as the meeting was going on. There was David Sibbet and Jennifer Landau writing on a huge piece of paper taped to the wall using markers and taking down in text and visuals and color what people were saying as they were saying it. I immediately connected to what they were doing. I was actually in awe. I remember saying to myself: "I want to do that!" Even in that moment, I instinctively knew I would be doing it, and doing it probably for a long time, which turned out to be true.

In 1980, David Sibbet gave his first two day course on how to do graphic recording. I talked the Foundation into footing the bill for me to attend the session. David popped in in the middle of it, but the primary teacher was Jennifer. At the time I remember David calling his business Graphic Guides. This later evolved into the Grove Consultants.

I worked at the Foundation and did graphic work there and on the side for the next 4 years. In 1984 I left the Foundation and went into business for myself. I remember feeling alone in my craft.

Eventually, I started finding clients. I got the bulk of my work from facilitators and consultants who would bring me in on a job. They often had to do a hard sell to convince their clients that a graphics person was even needed. In the late 80's, my business really picked up. There weren't that many of us so we traveled a lot, first nationally and then internationally, too.

I was fortunate enough to hook up with a few heavy hitters in the organizational development field. Not only did they provide jobs for me, but also, I was immersed in a hands-on learning environment about how people work together most successfully. But when that support was not present, there were lonely times. There was no organization or collective community established, so practitioners working for themselves were in the category of "solos".

As solos, it was difficult to get clients. We were not very articulate about the benefits of using our service in the early days. 9 times out of 10, it was perceived as an add-on or nice-to-have. That was the beauty of being brought in to an existing situation, because the consultants/facilitators could proclaim me as part of a package deal. In other words, the consultant needed me, whether the client did or not.

I have talked to other veteran practitioners who had different experiences of getting clients, but this was what it was like for me for many years until things changed later on.

As the years progressed, I made connections with other graphics people who were also soloists. The number grew over time. But by the mid 90's, we only knew of about 25 or 30 people that we would describe as kindred spirits (solos or graphics professionals not connected to an organization, firm or other entity). For the most part, they were all in the San Francisco Bay Area.

From time to time, we would hear about possible parallel universes. Jennifer said she thought there were people in Boston doing what we were doing. Someone else thought they had heard about people in Chicago. A lot of us did not know about MG Taylor yet. I came to know MGT myself around 1997. I'll talk about that in a moment, but first, I want to keep with my timeline.

Somewhere, I think, around 1994 two of my colleagues/friends and I were together somewhere talking about our field. My colleagues were Jennifer Landau and Leslie Salmon-Zhu, a kindred solo who I had met much earlier. Leslie said she wanted the soloists (and anyone else who wanted to) to come together as a community. I immediately said: "No way." In my mind, this meant putting together a complete organization. I was somewhat savvy about what that would entail and I felt like I had my hands full with my own business.

All she meant at the time, though, was let's get together as a community and share experiences and tips for how we do our work, and things along that line. Well,

anyone who knows Leslie knows that if she is passionate about something, she doesn't like to take no for an answer. She gently and persistently kept the conversation alive until I finally came around to her way of thinking. I remember us saying, "Let's start small with a gathering and see where it goes". We all agreed and hatched the first Graphic Recorder conference in 1995. Although we all joined in to make this happen, Leslie's vision, tenacity and support combined to be the impetus for IFVP.

The conference turned out to be so much fun, we decided to do it again the following year. It was all volunteer, hands-on. We continued on, and every year, people would volunteer to put on the next year. And so it went.

I remember that in 1998, we were planning the agenda for our third conference in my dining room. There were about 8-10 people there. We were trying to come up with a name or logo we could use for the event. After some give and take, I distinctly remember Jennifer saying, "Why don't we call it International Forum of Visual Practitioners", and the name stuck.

Around the latter half of the 1990's, I was introduced to the MG Taylor folks. The Taylors had their own brand of facilitation, which focused heavily on creating environments that could bring out the best thinking of people. I worked many gigs at the knOwhere Store in Palo Alto, CA. Palo Alto is the home of Stanford University, about 40 minutes south of San Francisco in the Silicon Valley area. Graphic recording, what I was hired for, was only one small piece of what the store had to offer.

People from the neighborhood were welcomed in, but essentially, it was a designed environment to facilitate a group's thinking and creativity. It was a facilitative venue that included large rolling walls, like a white board (only cream colored and bigger) with rolling furniture, books, stuffed animals and art pieces all around, musicians, facilitators, tech folks using computers and copiers. The people who worked in the environment were known as "knowledge workers".

The workers brought in groups of people, sometimes from the same company and sometimes from a certain industry, to have informative, collaborative and facilitated experiences.

During those sessions, I would capture ideas and information from the group on the walls using white board markers. Then when the participants moved onto a new activity in another part of the space, I was tasked with copying by hand what I had just recorded onto a hypertext pad and giving it to the technicians. They would turn it into digital form or video or print so the participants could look back at what they accomplished before they left, during closing, or have some artifact from the experience to take with them. I think hypertext was high tech at the time.

Also around that time, there were a couple of other organizations that I might mention. One was The Idea Factory and the other is Kaos Pilots. I worked for both of these groups from time to time.

The Idea Factory was similar to the knOwhere Store, not the store part, but the facilitation part, and with a focus almost solely on finding innovation. They created an environment using various tools and techniques, like story boarding and sand tables and more. Graphic Recording was just one of their tools.

Likewise, Kaos Pilots also would bring in a group of people from the same company or same industry. They also used various techniques to create an environment. Again, graphic recording was just one of their tools.

In 2001, IFVP became official with a 501(c)(6) IRS status and a board of directors. IFVP started out and continues to be a membership organization. This might sound like we just snapped our fingers and did it, but there was give and take over a few years about whether or not to become “professional”. I think we were afraid of losing our identity in the midst of institutionalization. I remember one meeting in 2001, after wrangling once again on the issue, a colleague stood up and said, “Quit talking about this. If it costs \$300 to fill out papers, I’ll write you a check. Now, let’s do it.” And we did. The board had their first meeting in 2002. I was on that board.

Over the years, the face to face conferences continued and a web site was maintained. Launa Post, administrator of many, many, many years is IFVP’s Rock of Gibraltar. New colleagues, new styles, new technology and new perspectives emerged, all variations on a theme, so to speak, but we, to this day, still retain our core.

In 2019, the IFVP Institute was established. It is a spin off of IFVP, but very much still connected to it. I am currently on the board of IFVP Institute. Its mission is to advance the development and application of visual thinking and practices overall and, to amplify the collective impact of visual practices on education and social issues. The Institute is also working to promote an academic and scientific base for our practice and actively encouraging social applications of the field through shared projects.

Terminology

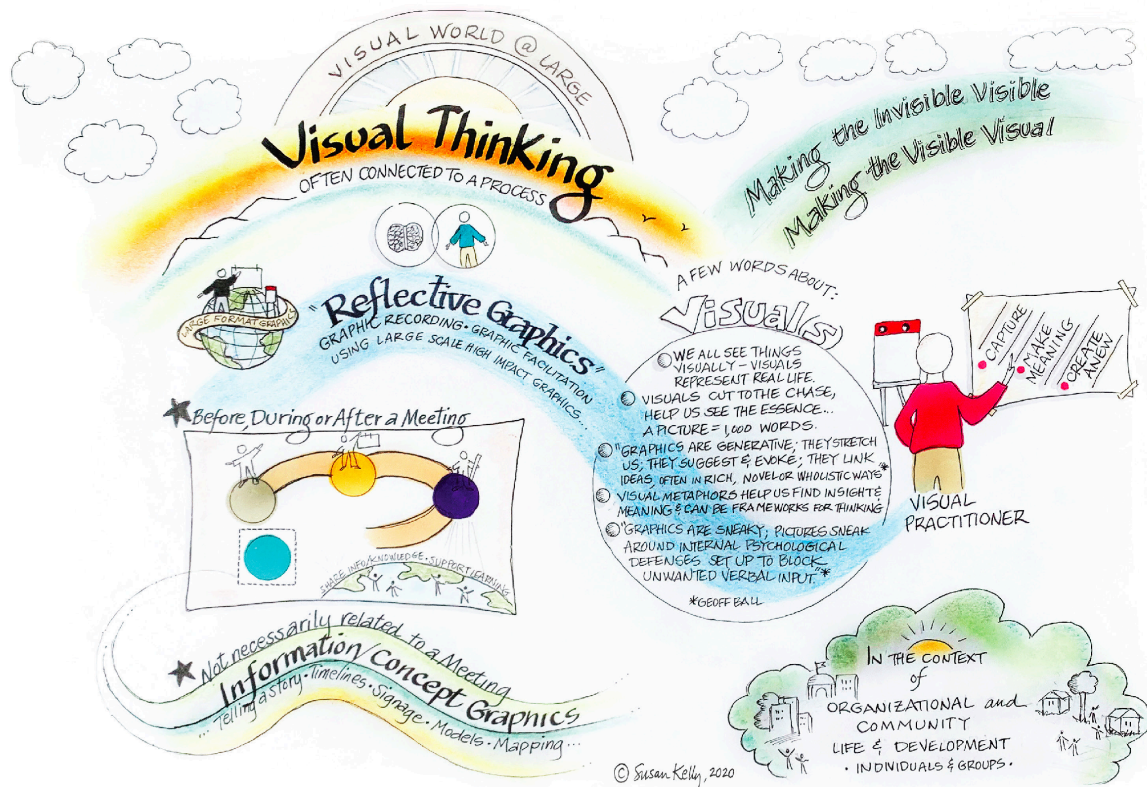
For the record, I’d like to offer definitions of Graphic Recording and Graphic Facilitation, our primary work.

The distinction between the two depends on whether or not a group is using the graphic chart in an interactive way.

An example of **Graphic Recording** is when a practitioner is capturing a speaker's remarks and the group is facing the speaker. The Recorder may even be off to the side or in the back of the room. In essence, the Recorder is listening, organizing and documenting what is being said, but the group may not view it until later.

An example of **Graphic Facilitation** is when the group is interactively working with the chart that is being created. It begins with the Graphic Recording of people's expressions, but in addition, a practitioner can graphically facilitate a group's thinking by using layouts, formats, graphics and color to help a group make meaning of their ideas or create something new, either alone or in tandem with a process facilitator.

David Sibbet, in a article he wrote, describes how in the early days, he was beginning to get a "sense of the difference between graphic recording – a kind of visual note taking – and graphic facilitation, which integrates facilitation and interactive graphic recording to help a group reach its goals. With graphic facilitation, the group is integrally involved in seeing and helping shape the display".



The Scope of our Work and the Big Tent

I want to use the metaphor of the big tent. Whether you call yourself a Graphic Recorder or Graphic Facilitator or a Visual Practitioner or a Visual Facilitator, you have a place in IFVP's big tent of visual thinking and practice. The beauty of us as individual practitioners is that we can use a mix of skills and products to create services for clients in our own unique style. At the same time, we have a core that is common among us. It is not a free for all; it's just different clothes cut from the same cloth.

This is how I currently see the core of our work, what we all share under the big tent, whether we are working in analog or digital:

- We create a synthesis of ideas and information in real time as people are expressing them or offering them, resulting in documentation.
- We capture people's ideas and information in organized ways.
- We use visual language (text + images).
- We use processes that move a group along (from loose conversation to tightly facilitated)

The attendant products and services can include: charting; lettering; drawing; illustrating; cartooning; page layout and design; creating information graphics; turning text into visuals; redrawn visuals; signage; computer enhancements; after meeting reports, and more.

Then there are the tech related facets, like digital graphic recording, graphic facilitation using things such as Mural Board or other virtual environments that simulate meeting spaces. There is the whole world of Sketchnoting. The other day, a group talked about how AI could factor into our work.

So the tent seems to grow and grow in diversity.

The fact that the tent continues to grow in diversity leads me to some questions: How much diversification is too much where we get lost in it? Could we lose our differentiation or our niche if we have too many variations on a theme? Could we lose our very identity? Who does IFVP serve these days? What exactly is our identity? What is our field going to be like in the future in a changing world?

Are we going to fade into oblivion or are we going to blossom ever more to benefit

the world? Actually, we are distinctly poised and in a position to blossom by the inherent nature of our work. The beauty of what we do is that it cuts across all facets of business and community life. It works to varying degrees for everyone.

I am hoping the tent keeps growing and blossoming and that our culture of inclusion and welcoming can continue to subsume all kinds of visual practices. I think we can do this if we keep our eye on our core and operate from a place of service.

How We Do our Work

There are many ways we do our work and it's often a mix and match – before, during and/or after meetings. The ways we help set the stage; the different ways of capturing and graphically facilitating people's thinking; or the different ways we follow up and contribute to ongoing efforts. We take our cues from the clients and their needs and their purpose(s) for using us in the first place, and then customize our service in a particular way that meets those needs.

How we do our work can include: what we listen for, such as, things that support the agenda or the purpose of the conversation or the desired outcomes; how much content we capture; how we use formats; how we lay out a page; what we might highlight; how we see patterns and themes; other ways we can graphically facilitate. Maybe some charts are heavy on text, or heavy on visuals, or anything in between. Some clients want us to capture almost verbatim. Sometimes clients want a lot of visuals.

As far as the practitioners go, some may only capture ideas and information and that is the end of their role. Others may use their graphic skills and techniques to go on to help people make meaning and create anew in collaboration with a process facilitator; or some may play both roles of graphic facilitator and process facilitator simultaneously.

I think it is very important to understand the difference between working in analog, i.e., face to face, in real time, in physical space vs. working in the virtual world. There are many practitioners under our tent that work virtually, some only virtually. Working in the virtual world, obviously, is one dimension removed from our physical reality, so that you actually lose some of the benefits of our work in physical reality.

In virtual, most practitioners are working on ipads or other devices. The group is not necessarily looking at what you are writing or drawing unless you have it up on a screen simultaneously but that's still virtual. Meetings in the virtual world are a little dead or flat in terms of energy.

When you are in a physical space with the participants, who are able to see what you are capturing and interact with it (because of the size of the chart), a whole new world opens up. It is very human oriented. There is a particular energy in the room

that can only happen in real time among people. There are nuances and layers of understanding and emotional tones and invisible communications. There is a collective feeling and a certain aura and enhanced creativity that people tap into when they are working well together. (They are often working well together because of our graphics.) There's just a richness that you can't get virtually.

Here are some benefits working with a large scale displays:

- It allows you to scan a large amount of content and visuals at once.
- It assists your brain in seeing patterns and relationships among parts.
- It enables a whole system view, i.e., see the parts and whole simultaneously.
- Everyone can all see the same thing at the same time, so it supports collaboration.
- When people can see the conversation unfolding before their eyes, they have greater comprehension and retention of information, as well as more ownership of the process.
- When people can literally see their contribution to the conversation, they feel heard and included, which enhances listening and often results in more trusting.
- Since the record is public, it, in itself, is trusted, which often leads people from "my way" to "our way".
- Often because of our images, humor is introduced which is a necessary component of creative thinking and learning,

Who We Are as Practitioners and Our Culture

I want to make a point that we Visual Practitioners are unusual as an occupation. There is something in the water in our culture that is almost magic. We attract a certain kind of person, and it takes a certain kind of person to do this work. Ask any visual practitioner and they will know what I'm talking about.

If we sent out a request for applicants to do this work, we'd have to say that they must have the following qualifications and perform the following roles and more:

Serve people and help them achieve their goals.

Be human oriented and caring.

Be welcoming.

Be neutral.

Be creative.

Be passionate.

Have a good sense of humor.

Be community minded.

Be well organized.

Be professional.

Be adaptable.
Be patient.
Be artistic.
Be sharing.
Be confident.
Be trustworthy.
Write legibly.
Be fun loving.
Be non-competitive.
Be a black belt listener.
Respect all people and their expressions equally.
Be able to channel information and ideas succinctly and faithfully.
Be able to draw identifiable objects.
Be able to easily find the essence of what people are saying.
Be able to see the big picture and its parts simultaneously.
Be willing to park your ego and personal needs at the door.

I don't know too many other occupations where these words describe most people in a particular industry.

The work we do is art and science rolled into one. We touch humanity; we assist our brains in analyzing and finding patterns; we broaden people's perspectives; we simplify complexity; we find essence; we clarify; we use visuals to simultaneously ground and elevate people's thinking; we help people solve problems and make decisions; we help people find common ground; and we do this with humor and caring and black belt listening and interpreting. Our field is elegant: simple and complex at the same time.

That's why it is hard to describe in a title or a moniker how such a seemingly simple thing like listening and capturing and respecting a person's ideas and reflecting them back, could be so impactful, compelling and instructive.