

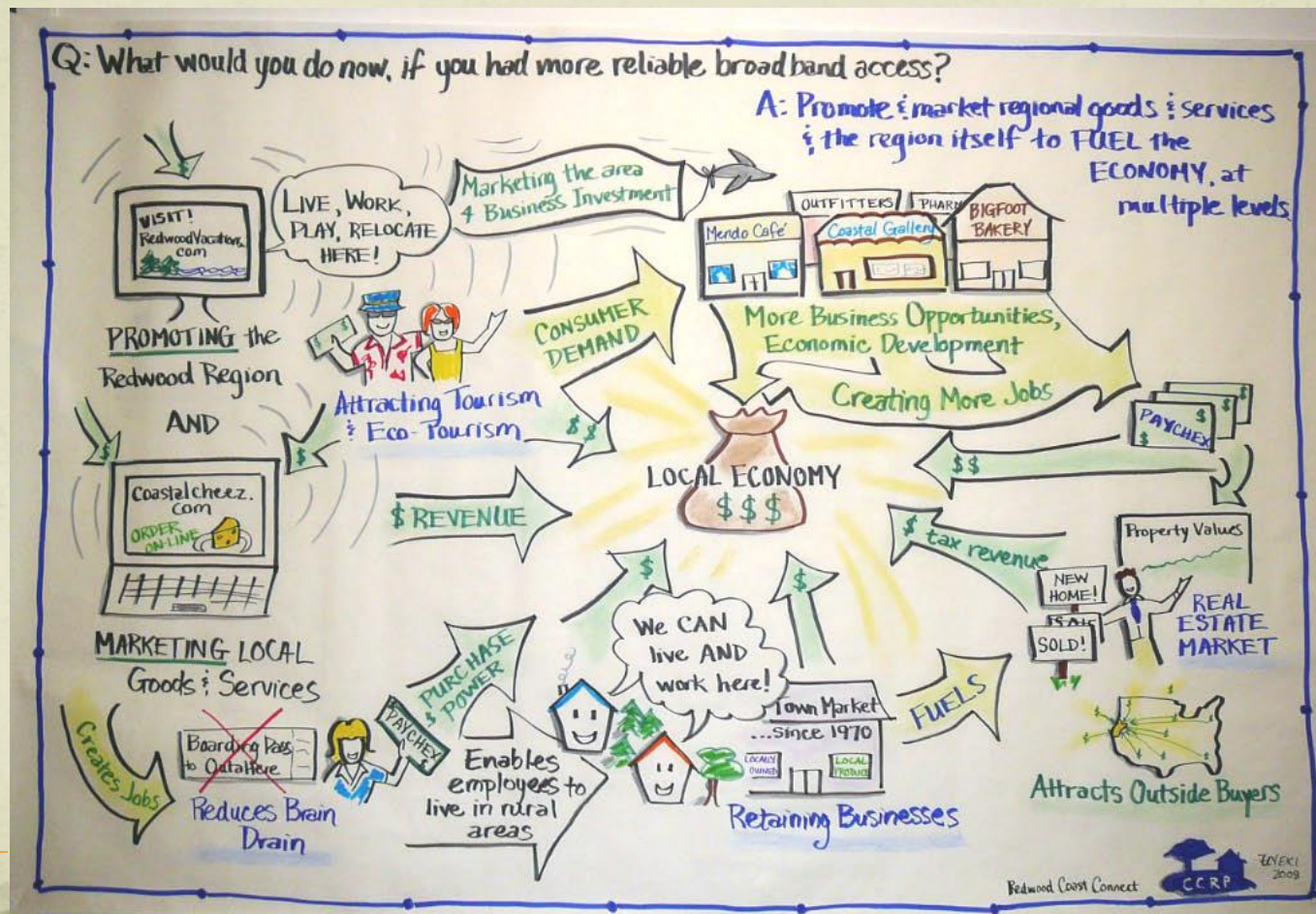
# **I See What You Mean: Applications of Visual Methods in Evaluation**

**Jara Dean-Coffey & Terry Uyeki**  
**jdcPartnerships &**  
**California Center for Rural Policy**  
**Humboldt State University**

**AEA Conference November 10, 2010**

# What is Graphic Facilitation?

**a visual method used for facilitating and/or recording group interaction, presentation of information, and dialogue helps people to “see their thinking”**





# Why is Graphic Facilitation useful?

People often think & speak in pictures



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Terry Uyeki  
California Center for Rural Policy  
Humboldt State University

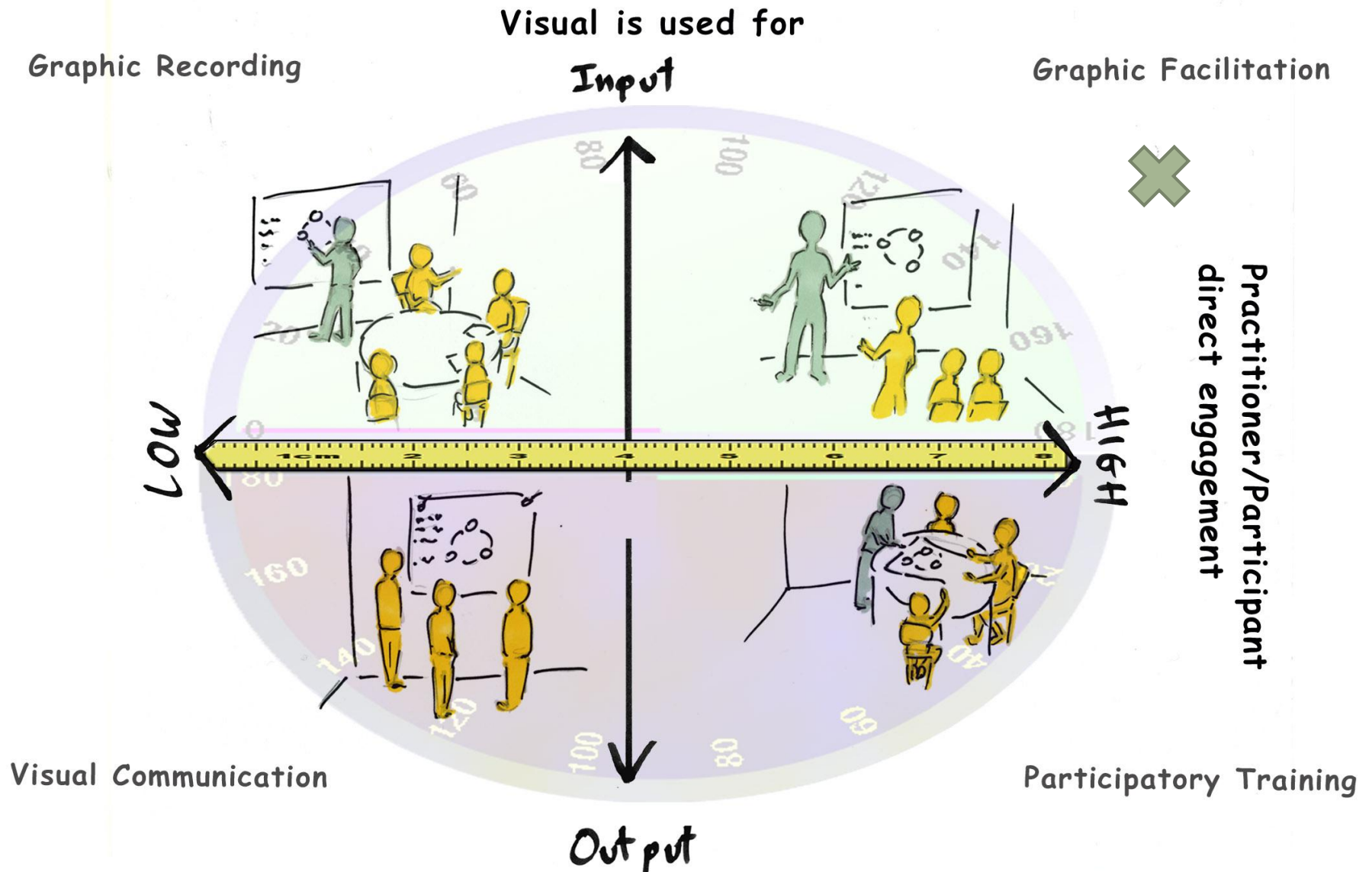
As a practioner of graphic recording/graphic facilitation





# Visual Extension

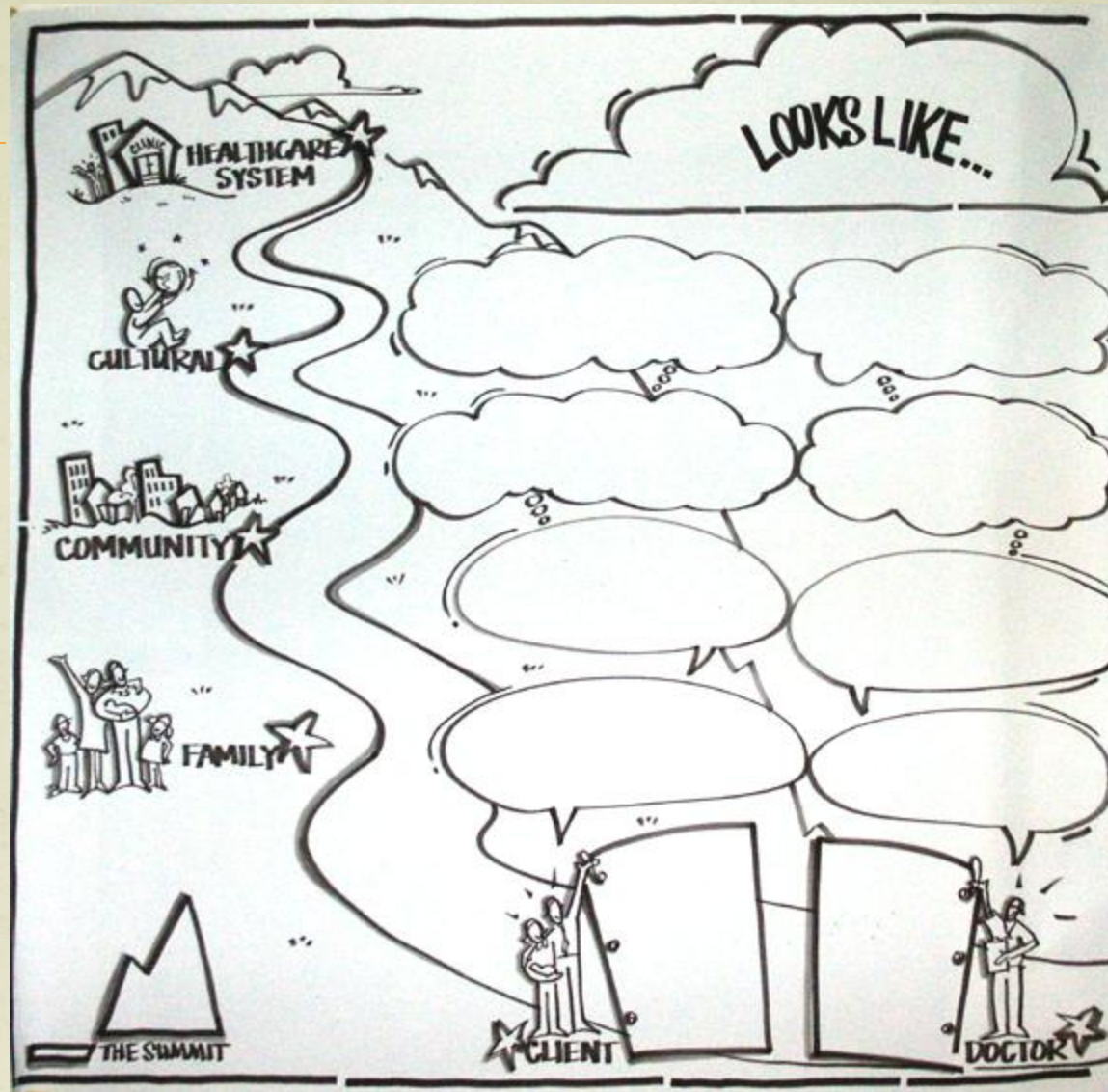
## Uses of Visuals for Group Engagement



Role of the  
health care  
system

Role of the  
community

Role of the  
family in  
supporting  
habits



Patient-provider interaction

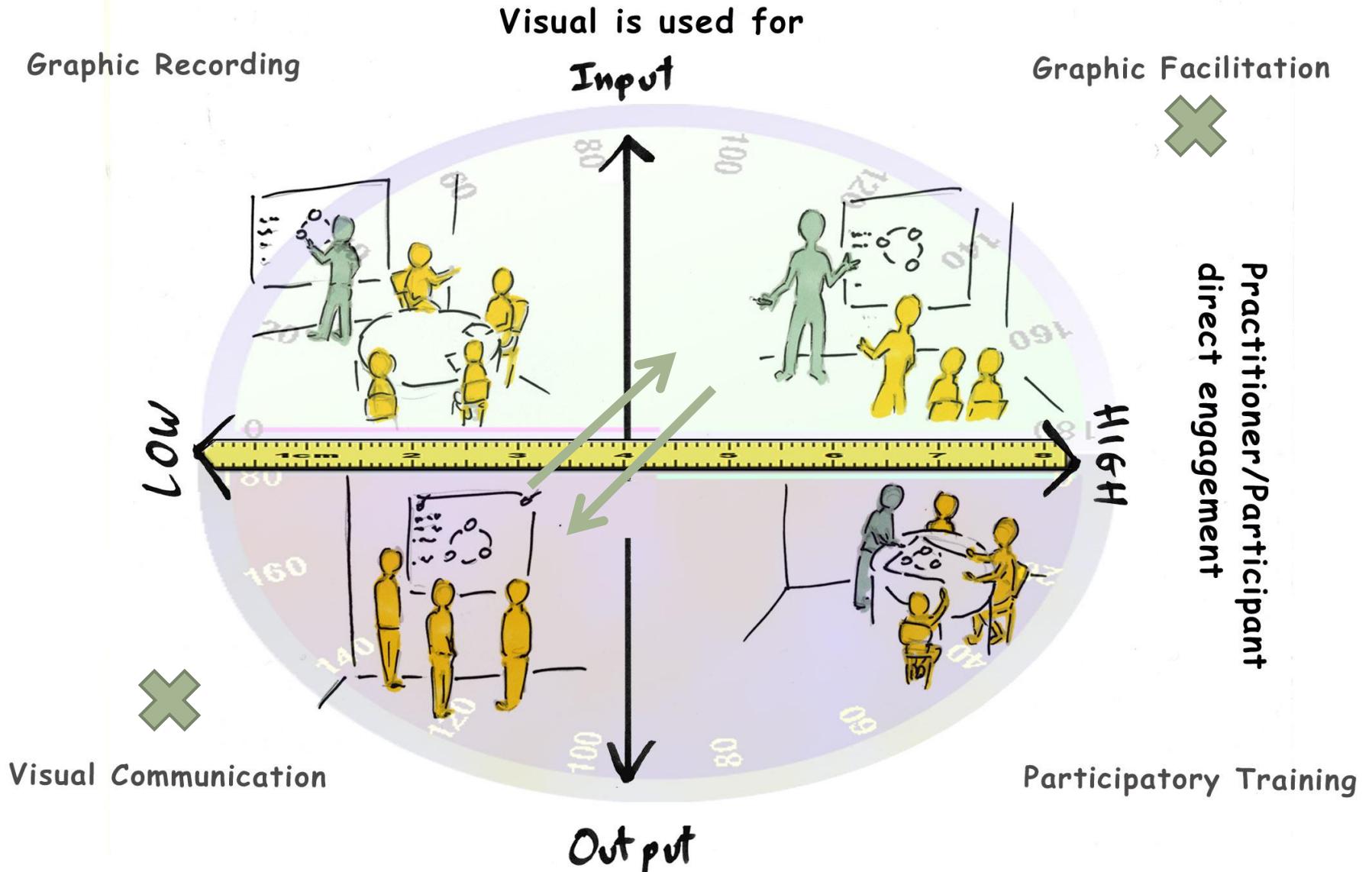




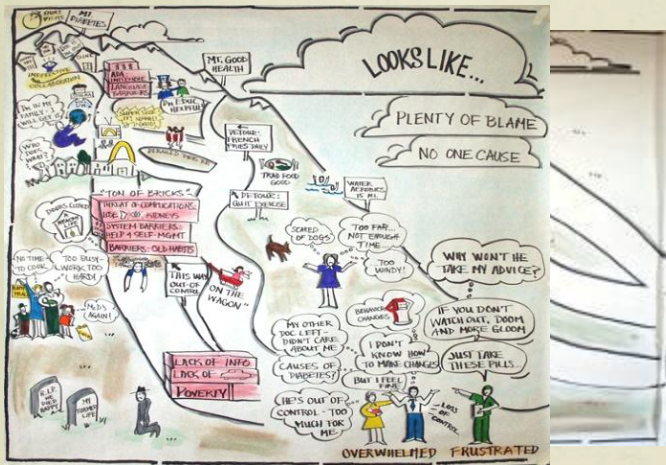


# Visual Extension

## Uses of Visuals for Group Engagement



# Community Prioritization for Community Initiatives



Needs & Assets  
Identification



Prioritization of  
Approaches

Visioning



What's working now in your community to help people, especially parents & families to cope w/ their problems, or to keep problems from getting worse?



Programs for  
Young Children

Talk to  
Teacher



Small Classroom  
to help children  
1:1 with Teacher

TEEN CENTER  
Youth Activities

Tutoring  
help for HHS students &  
☒ See counselor or  
peer counselor



Parenting, Family  
Resources



Men's  
Group

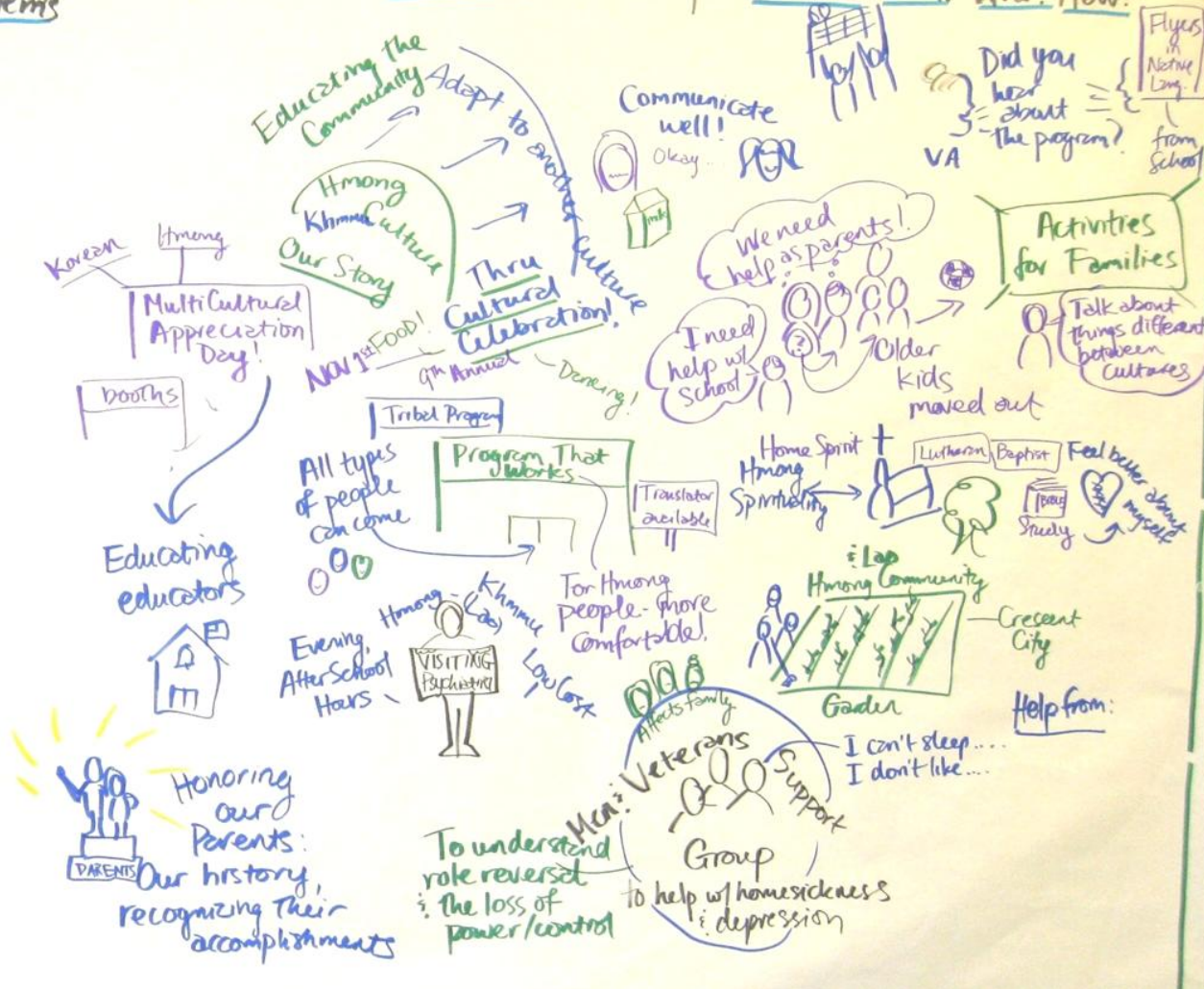


Women's  
Group

Focus Group, Hmong  
adults in Del Norte  
County

Identification of  
community assets,  
prevention & early  
intervention for mental  
health problems

# What else would help? Where? When? Who? How?



Focus Group, Hmong adults in Del Norte County

Identification of potential solutions, prevention & early intervention for mental health problems



# What programs/activities/traditions could Help People to Better Cope w/ Life's Problems & Avoid / Get Help Early for Mental Health Problems?

the Community



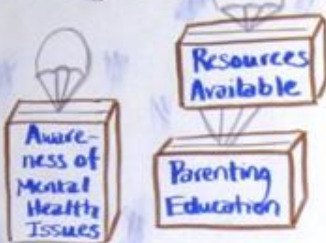
Increased Cultural & Traditional Events, Celebrations & Activities  
HAPPY NEW YEAR!



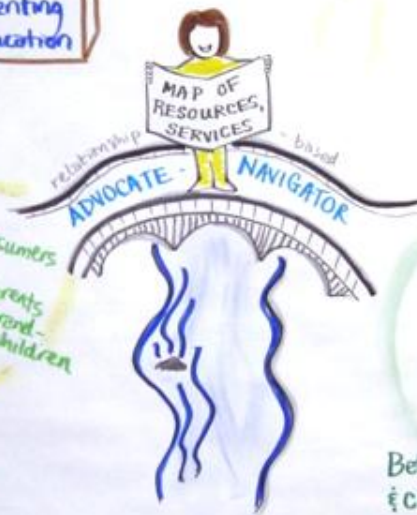
RESOURCES to take care of Self & Family



EDUCATION, OUTREACH, TRAINING: COMMUNITY & PROVIDERS



Health & Human Services



Screening: Early Identification



CULTURAL SENSIVITY



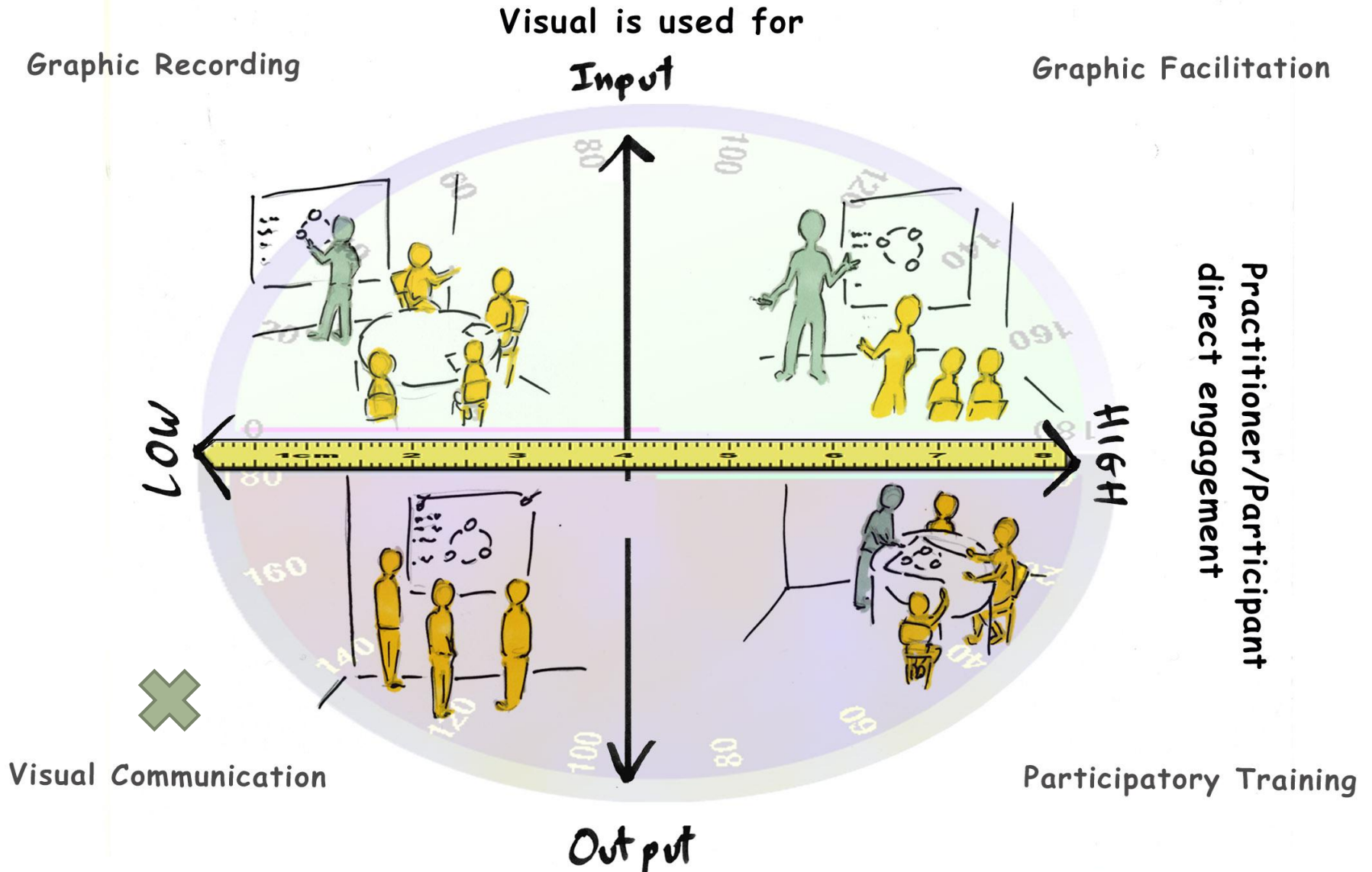
Available, Affordable, Accessible, Appropriate (Culture & Language)

Better services coordination & collaboration through provider networking

FRC law enforcement programs  
Counseling  
Teen Center  
EX-PAND what's already working

# Visual Extension

## Uses of Visuals for Group Engagement

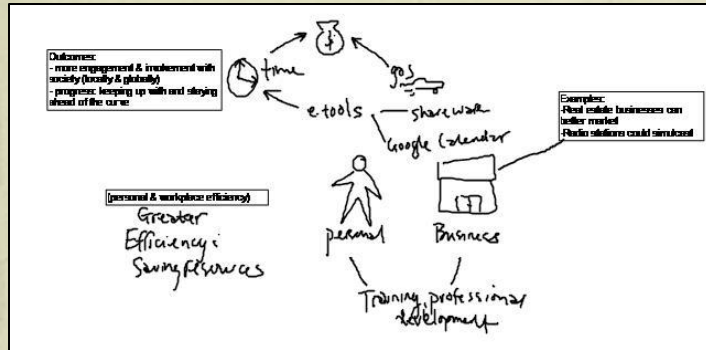




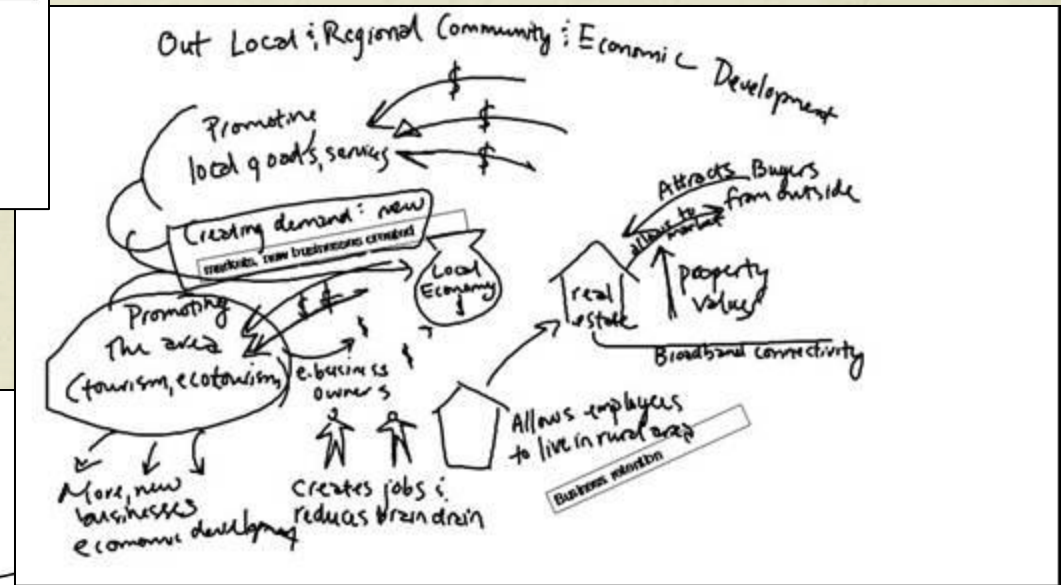
# Question 1 Themes

1. Economic Development
2. Tourism
3. Promoting markets, goods & services
4. Access to government services
5. Streaming media
6. Attracting businesses (relocation)
7. Education
8. Brain Drain (keeping youth here)
9. Recreation
10. Communication
11. Download Software & Large Files / Program upgrades
12. Access to news & information
13. Training, professional development
14. Business / Worksite development, efficiency
15. Saving resources (time, gas)
16. Telecommuting
17. Health care
18. Public safety & emergency services
19. County connectivity
20. Seniors
21. Self sufficiency @ home
22. Engaged / involved in society / global community
23. Entertainment
24. Upload Files
25. Environmental & Natural Resources Management

# Further “distilling” of themes & beginning mapping

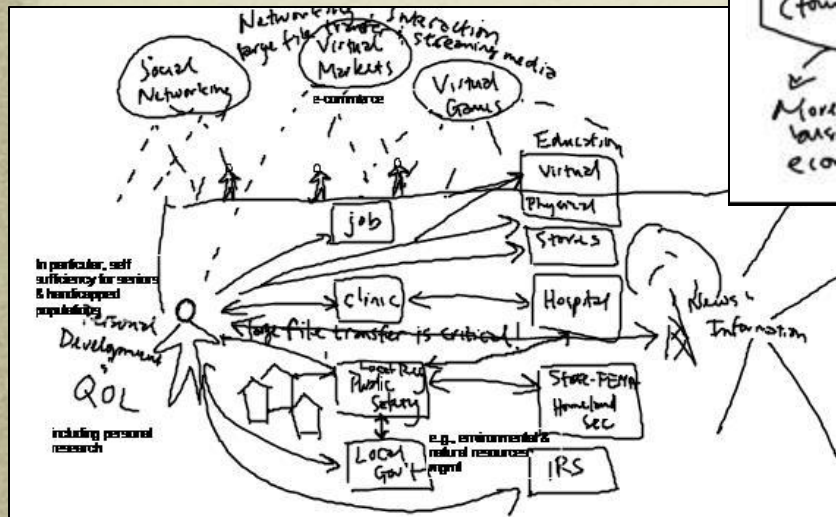


← Personal & Organizational Efficiency & Effectiveness



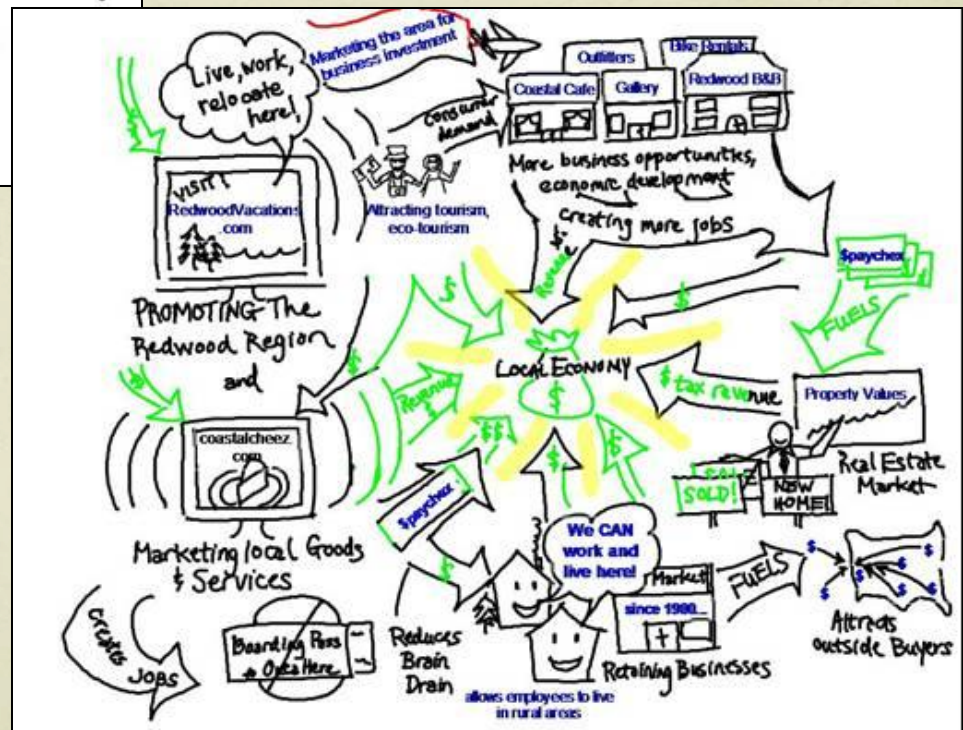
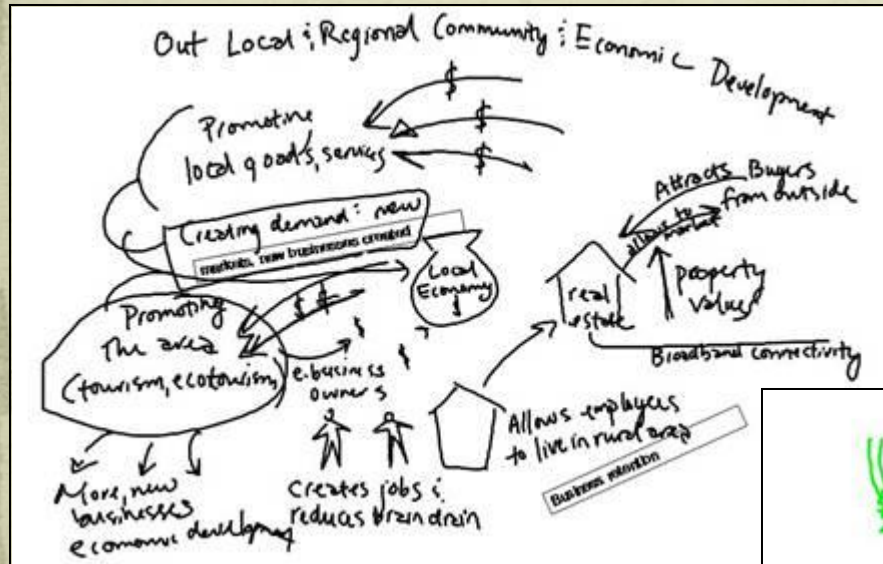
↑ Stimulation of Economic Development

← Personal Development & Enrichment of Quality of Life for Individuals

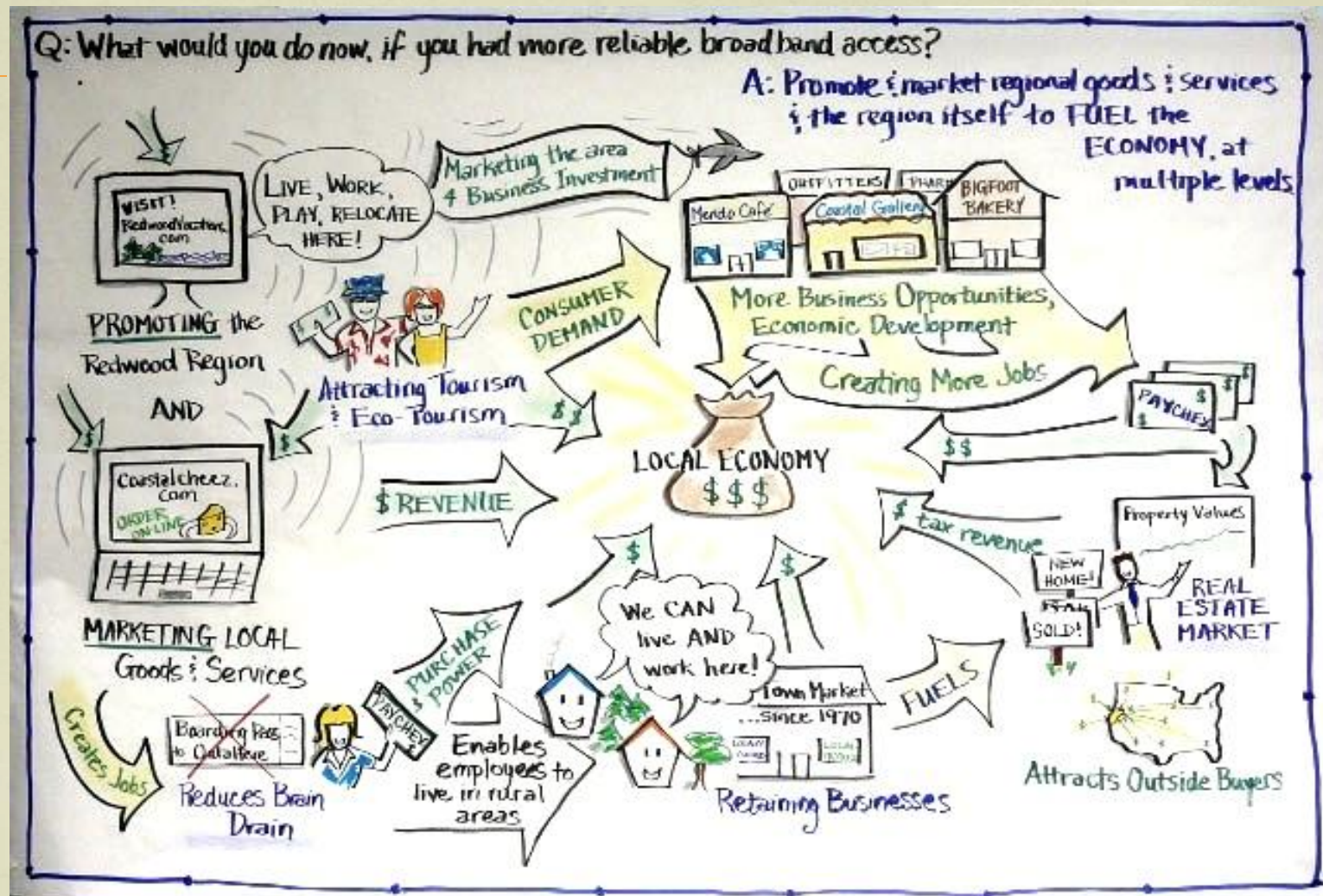




# Redrawing Final Rich Pictures







Having broadband access can promote and market regional goods, services, and the region itself, to fuel the local economy at multiple levels



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# Jara Dean-Coffey

jdcPartnerships

As a consumer of graphic recording

# Our Work and Our Clients

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## WORK

- ▶ Evaluation
- ▶ Strategy Formation
- ▶ Technical Assistance and Training
- ▶ Leadership Development

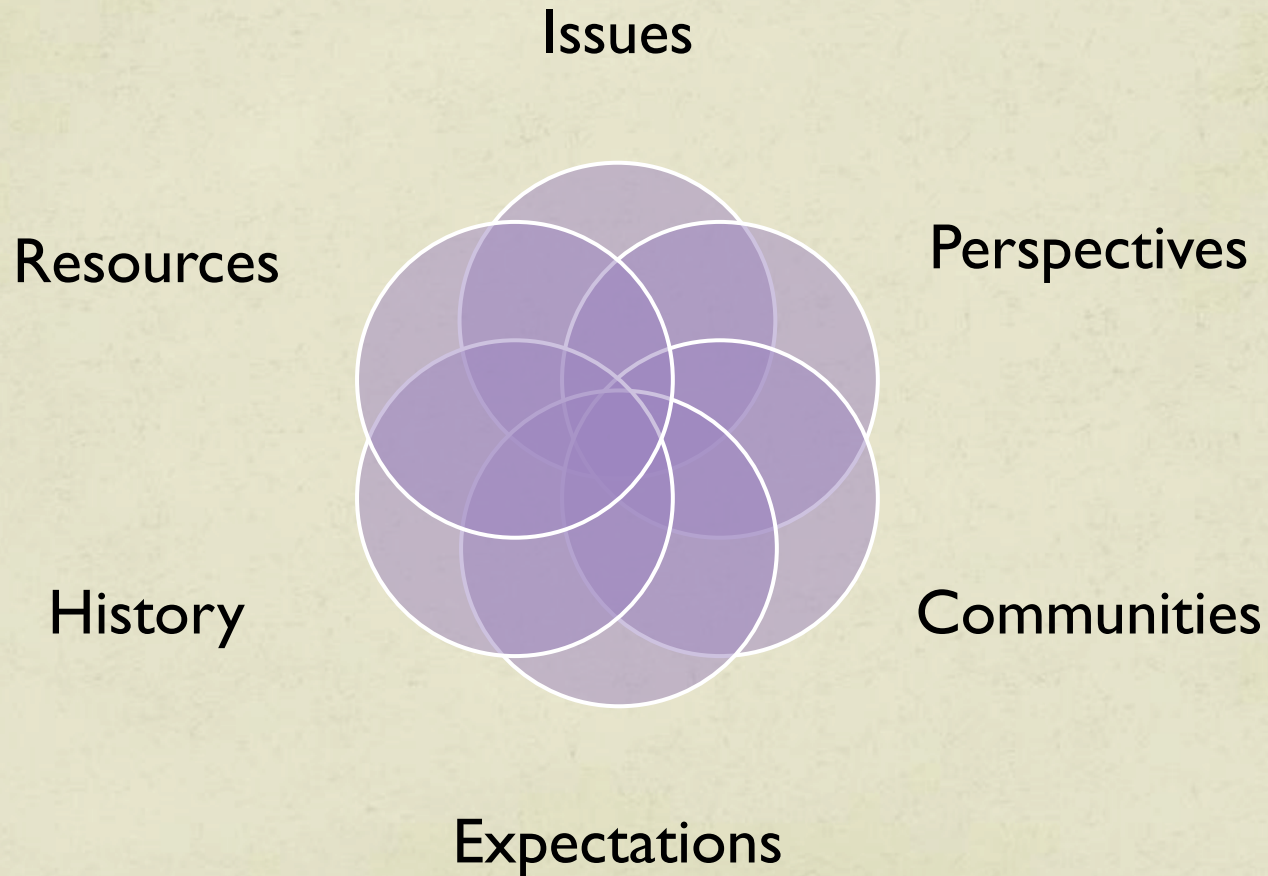
## CLIENTS

- ▶ Social Service Orgs
- ▶ Philanthropies
- ▶ Public Sector



# The Context

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# Data Visualization: Friedman 2008

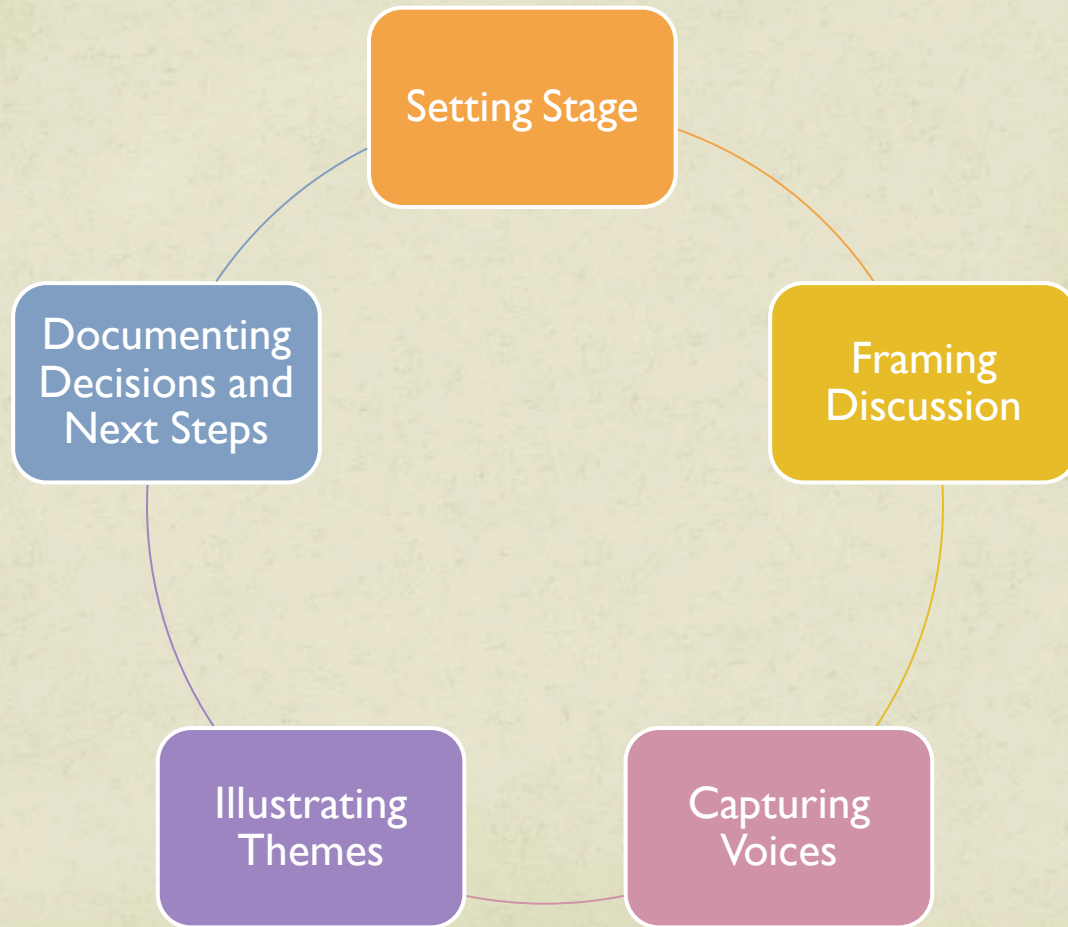
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- ▶ “Main goal of data visualization is to communicate information clearly and effectively through graphical means. It doesn’t mean that data visualization needs to look boring to be functional or extremely sophisticated to look beautiful.
- ▶ To convey ideas effectively, **both aesthetic form and functionality need to go hand in hand**, providing insights into a rather sparse and complex data set by communicating its **key-aspects in a more intuitive way.**”



# Benefits

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# Preparing for the Future

Examples from a planning process



# Setting

## **FIRST 5** SAN FRANCISCO ★ **MISSION**

The Mission of the San Francisco Children and Families Commission is to instill an enduring obligation for optimal health and development for every child living in this county. This means a commitment to support young children and their families from prenatal to five years of age through abundant opportunities to be healthy, learn, and grow. Children will reach their full potential. Families will be empowered and engaged civic partners in the work of the Commission.



## **FIRST 5** SAN FRANCISCO

### COMMISSION 2015 VISIONING SESSION

#### ★ **AGENDA**

- 9:00 am
  - Welcome & Overview
  - Accomplishments, Status and Context
  - Moving Forward: Our Collective Vision
- LUNCH
- 1:00 pm
  - Implications & Reflections
  - CLOSE

#### ★ **OUTCOMES**

- ▶ A vision of the role of First 5 San Francisco during the next stage of its life cycle (2015)
- ▶ Implications and next steps are defined.

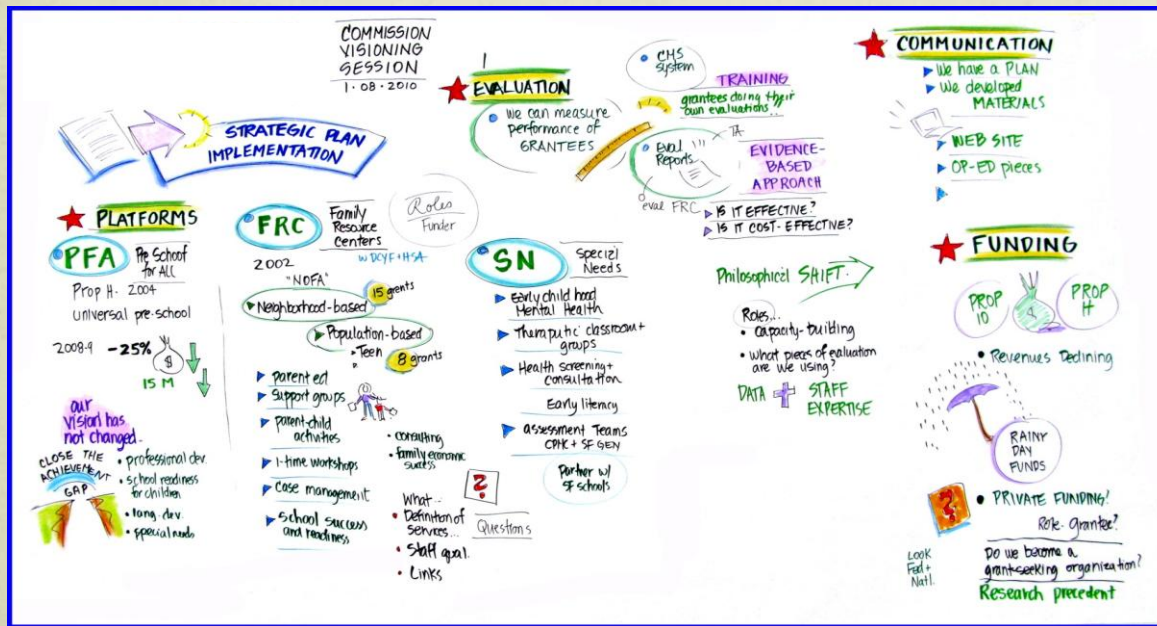
## **FIRST 5** SAN FRANCISCO

### ★ **VISION**



All San Francisco children will thrive in supportive, nurturing, and loving families and communities. Children 0-5 will be safe, healthy and stimulated. They will be supported in their physical, emotional, and cognitive development. They will start school eager to continue to learn and grow with confidence and connections to families, communities and society.

# Setting





# Framing



# Capturing





# Illustrating

## ★ CHARACTERISTICS

Look at  
Whole System View

- Consistent Strong MISSION VISION GOALS

Strong Work Ethic

Clearly Defined Outcomes

Flexibility  
"Not be holden"

Evaluation

Transparency

Focused on 0-5 Population

School Readiness

Respected Professional Leadership

Partner w/ School District

Research & Best Practice

Structure - consensus Commission

Expertise on Commission

COLLABORATIVE w/ community

## ★ UNIQUE COMPETENCIES

Prevention

Special Knowledge of Staff  
community-based experience

Evaluation

Financial Planning  
Stewardship

Special Needs

Attention to Diversity

Focus and Flexibility

Right People  
Right Time  
Across Systems  
We are good HOSTS!!

LEADERSHIP!!

Action - Purpose

Collaborative Values

Family and child in Mind

## ★ CRITICAL PARTNERS



- School Districts
- DCYF
- HSA

ECE - Higher Ed  
FRC  
FSC  
DPH  
maternal community

Evaluation Consultants/Firms  
ASR - spear

CBO/grantees

Juvenile Court

- SF general + CPMC
- GGRC
- Mimi + Peter Haas Fdn.
- SFF
- Haas Jr. Fdn.
- Cowell

CONSIDER

Bay Area Council

Regional FJs

Office of Workforce and Econ. Dev.  
Housing Authority

## ★ GAPS

Advocacy Voice

How nimble can we be?

AGENDA -  
Reconvene Early Childhood Council

Build stronger leverage points

Communication strategy

What do we need to do DIRECTLY

changing NEEDS of Kids...

Increase is SMALL babies'

... as economic climate changes

Needs of multiple language children

SE area of SF  
South East

Hearings

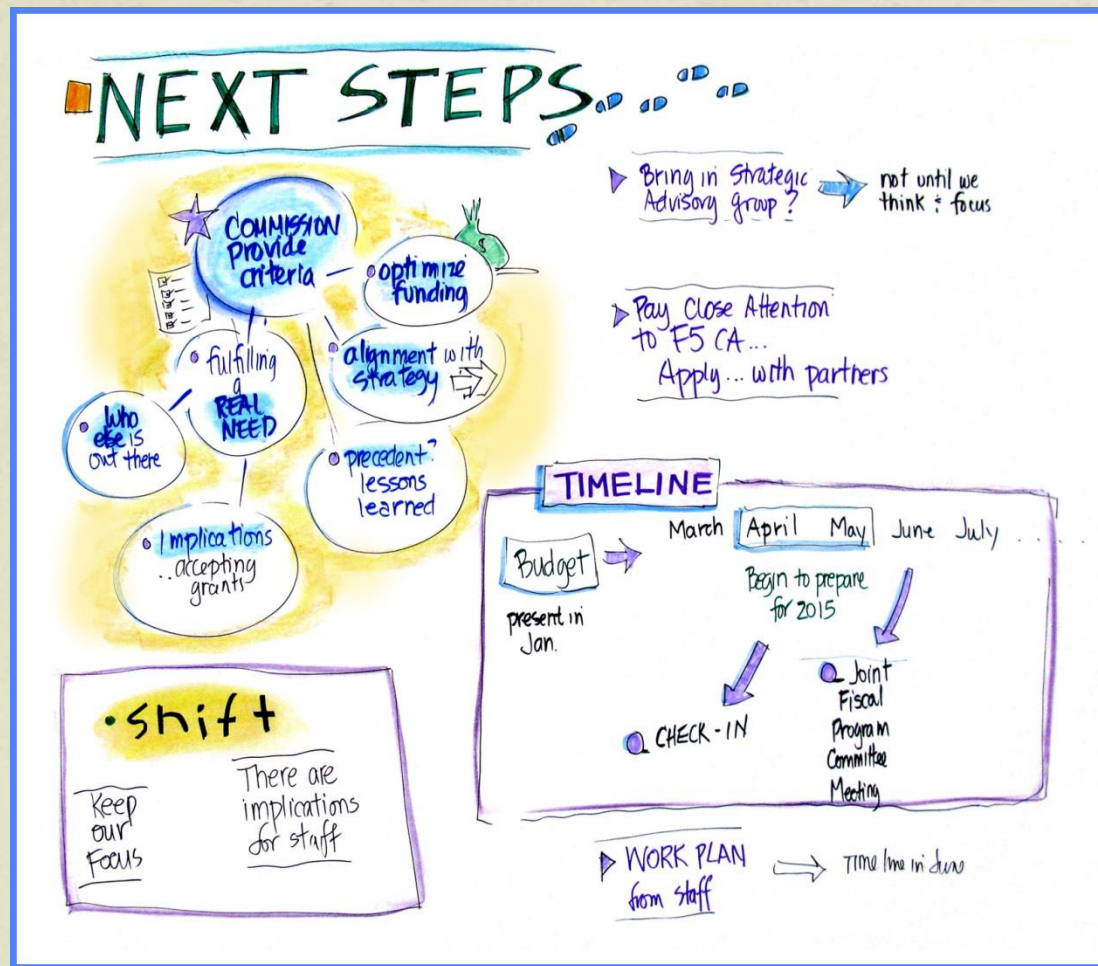
Research

Action

Birth to 3 yr old TIGHTER

Literacy

# Documenting








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# Developing a Theory of Change

# Setting

## CompassPoint 2009 Theory of Change Retreat

### Day 1 ★ AGENDA

- 9:00am Welcome & Overview 
- moving in to the* Theory of Change Work
- Values and Guiding Principles 
- L · U · N · C · H
- Values and Guiding Principles (cont)
- Issues & Audience 
- Review and Prep for Next Day
- 4:30pm CLOSE

### Day 2

- 9:00am Welcome Recap: Overview
- Expected Change 
- Modalities Strategies 
- L · U · N · C · H
- Strategies I-III 
- Emerging Theory of change
- Next Steps 
- Closing + Evaluation
- 4:30pm CLOSE

### ★ OUTCOMES

- ★ Guiding values which underpin all programming and operations are articulated 
- ★ Clarity on "target audience" with regard to intended outcomes (e.g. individual, organizational, regions, field sectors, etc.)
- ★ Modalities are reframed as core strategies aligned to outcomes (note: in what way)
- ★ Shared understanding of anticipated changes
- ★ Proposed Next Steps identified. Roles + Timeline
- ★ A practice of linking outcomes with TOC components begins

### ★ USEFUL PRACTICES

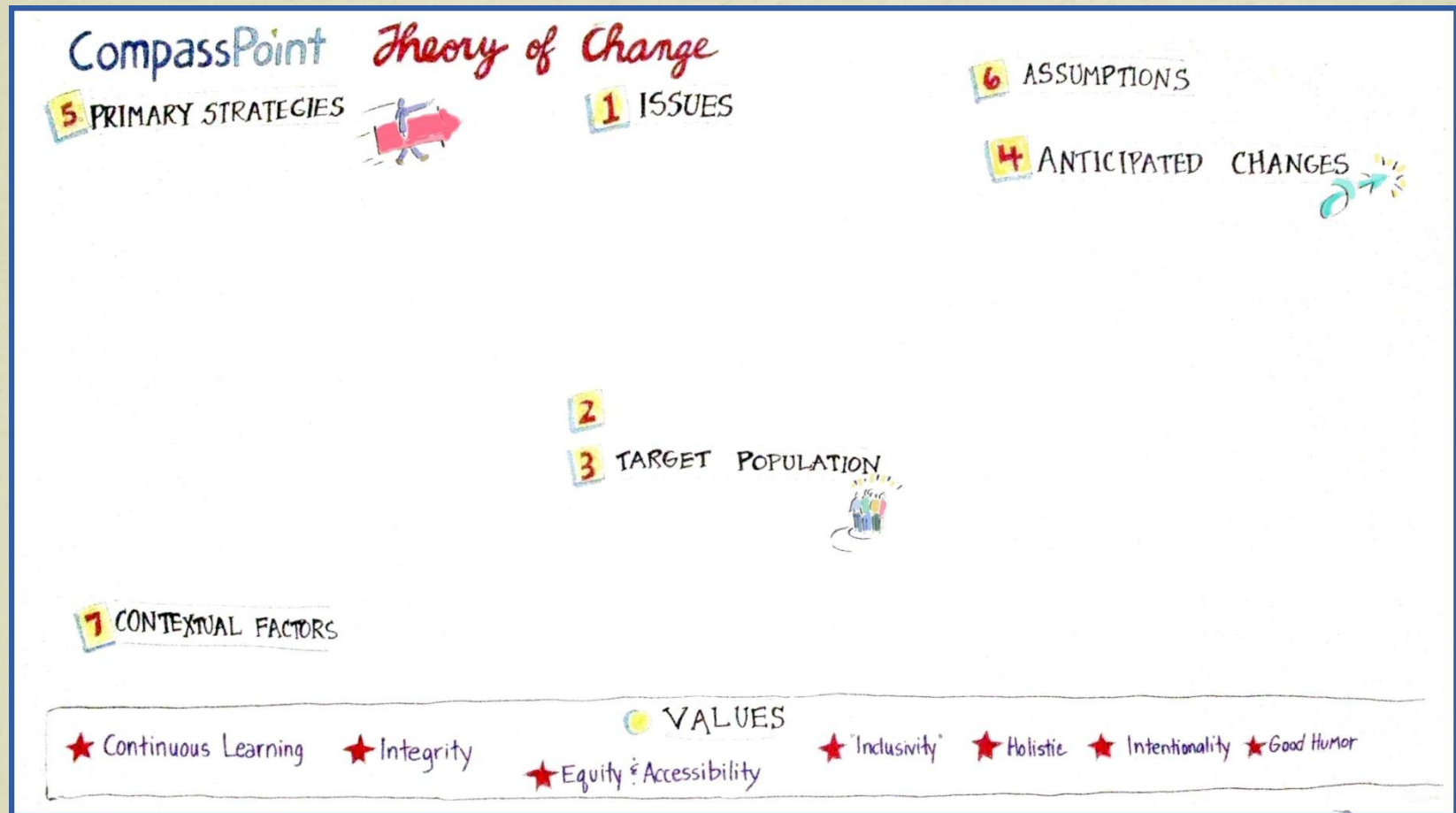
- ▶ Be Present
- ▶ Be Transparent
- ▶ Be CURIOUS
- ▶ Be responsible for your own learning!
- ▶ Be trusting of the process
- ▶ "No one is wrong!"
- ▶ Be mindful of jargon



# Framing

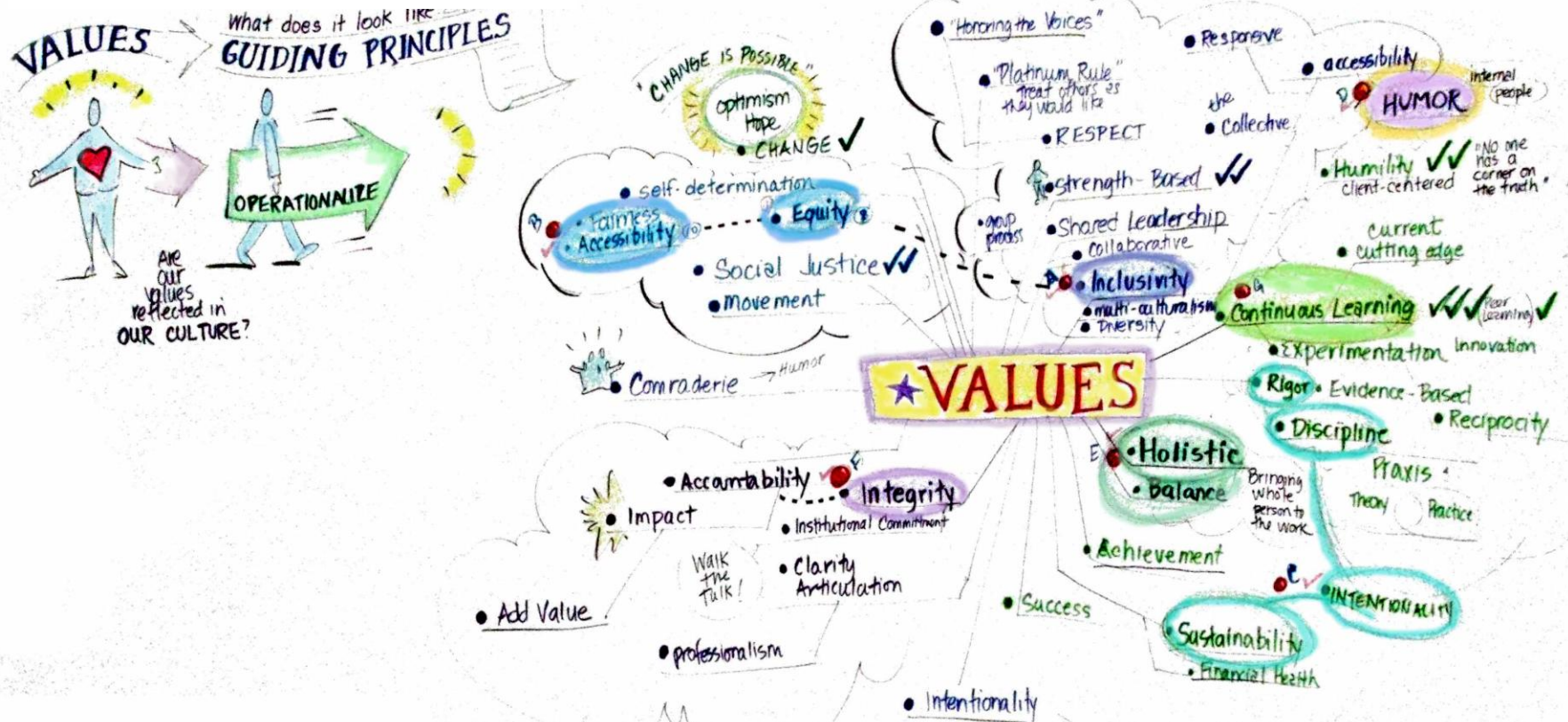


# Framing/Capturing

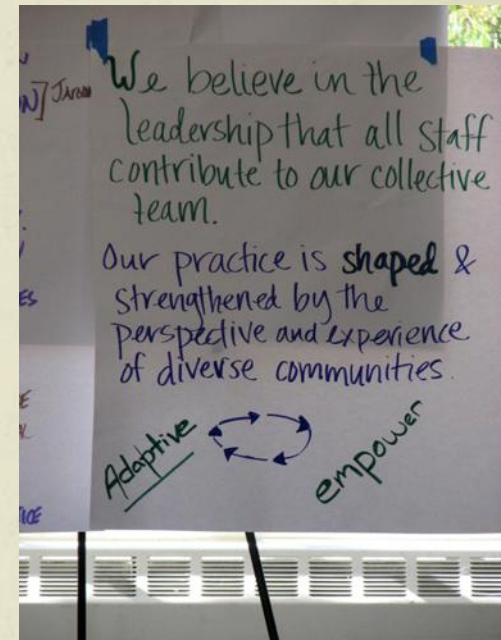
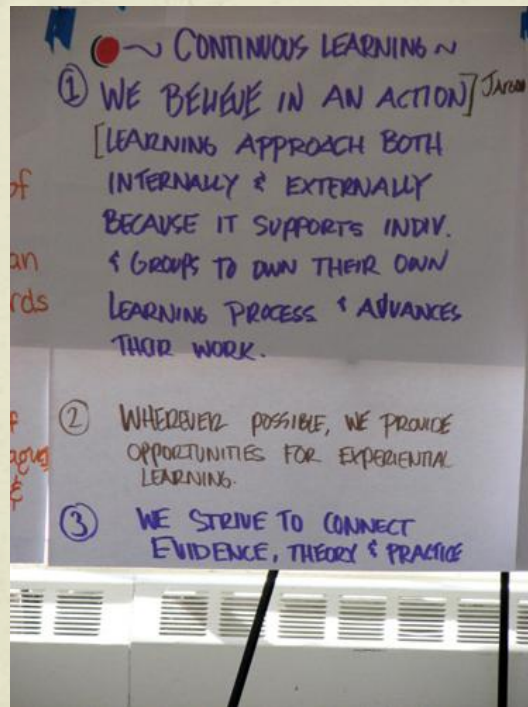




# Capturing/Illustrating



# Capturing/Illustrating





# Illustrating

## Value: Equity & Accessibility

- We align our work w/ clients, funders & partners whose missions promote a fair, just & healthy society
- We put mechanisms in place to make career & personal enrichment opportunities accessible to all participants
- We strive to recruit + hire people who believe in working towards a fair, just & healthy society

## HOLISTIC/BALANCE

By being holistic w/ our clients we take a broad approach to the issues presented to us, understanding & addressing how they might resolve throughout the org

In Delivering services in a holistic way we bring to bear all our tools, knowledge & expertise

Bringing the whole person to work but being able to take our whole selves home and have our own personal lives as well to be able to do our best work

## VALUE: Integrity

- everything we do is grounded in an explicit purpose to which we hold ourselves & our partners accountable
- in everything we do, we are honest about our motivations, process, & results

## INTENTIONALITY

PAY ATTENTION TO THE WHAT AND HOW WE DO OUR WORK

STRIVE TO BE REFLECTIVE ABOUT THE CHOICES WE MAKE

ARE DISCIPLINED IN OUR ASKS AND APPROACHES, AND FOCUS IN OUR ATTENTION TO RECONCILING THEORY & PRACTICE

## [GOOD] HUMOR

External

While always being mindful of our clients & their needs, we believe that humor is healthy & can create connections that forwards the work

Internal

Acknowledging the seriousness of our work and respect for our colleagues we believe that humor is healthy & can build trust & camaraderie

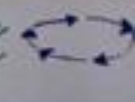
## CONTINUOUS LEARNING

- WE BELIEVE IN AN ACTION [LEARNING APPROACH BOTH INTERNALLY & EXTERNALLY BECAUSE IT SUPPORTS INDIV. & GROUPS TO OWN THEIR OWN LEARNING PROCESS & ADVANCES THEIR WORK
- WHEREAS POSSIBLE, WE FOSTER OPPORTUNITIES FOR EXPERIENTIAL LEARNING
- WE STRIVE TO CONDUCT EVIDENCE, THEORY & PRACTICE

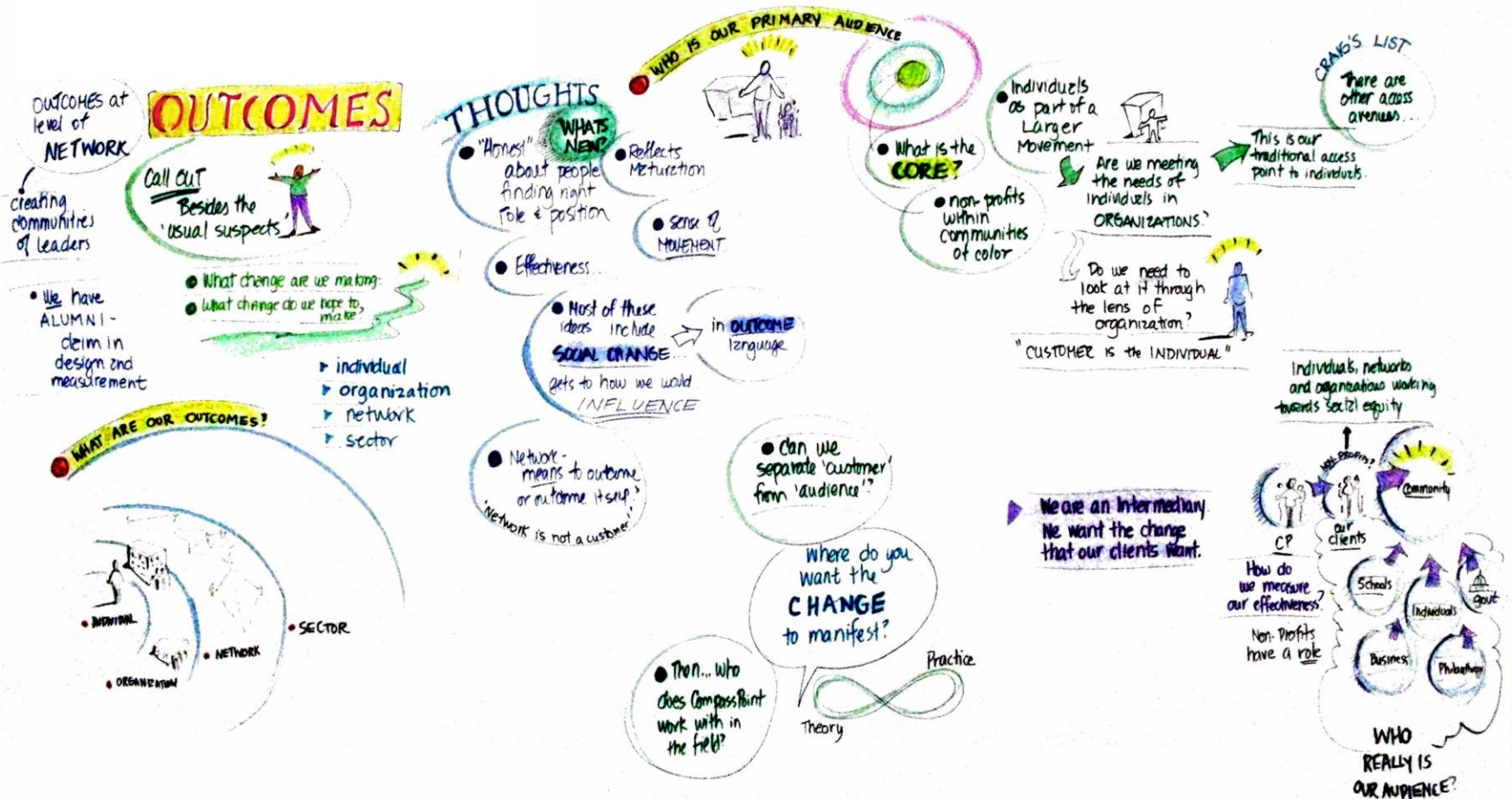
We believe leadership that contribute to team.

Our practice is strengthened by perspective and of diverse con

Adaptive

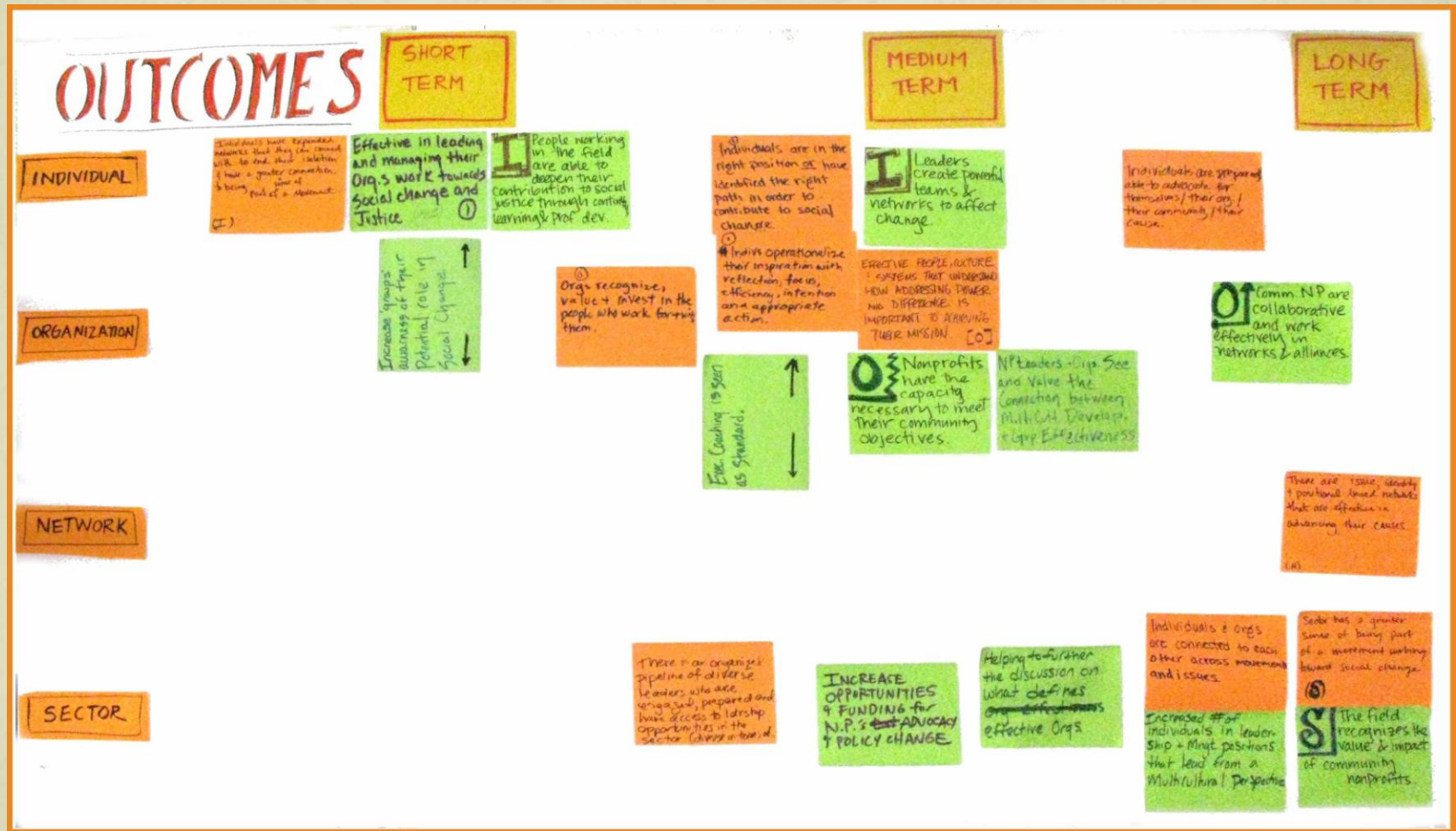


# Setting/Framing





# Framing/Capturing/Illustrating

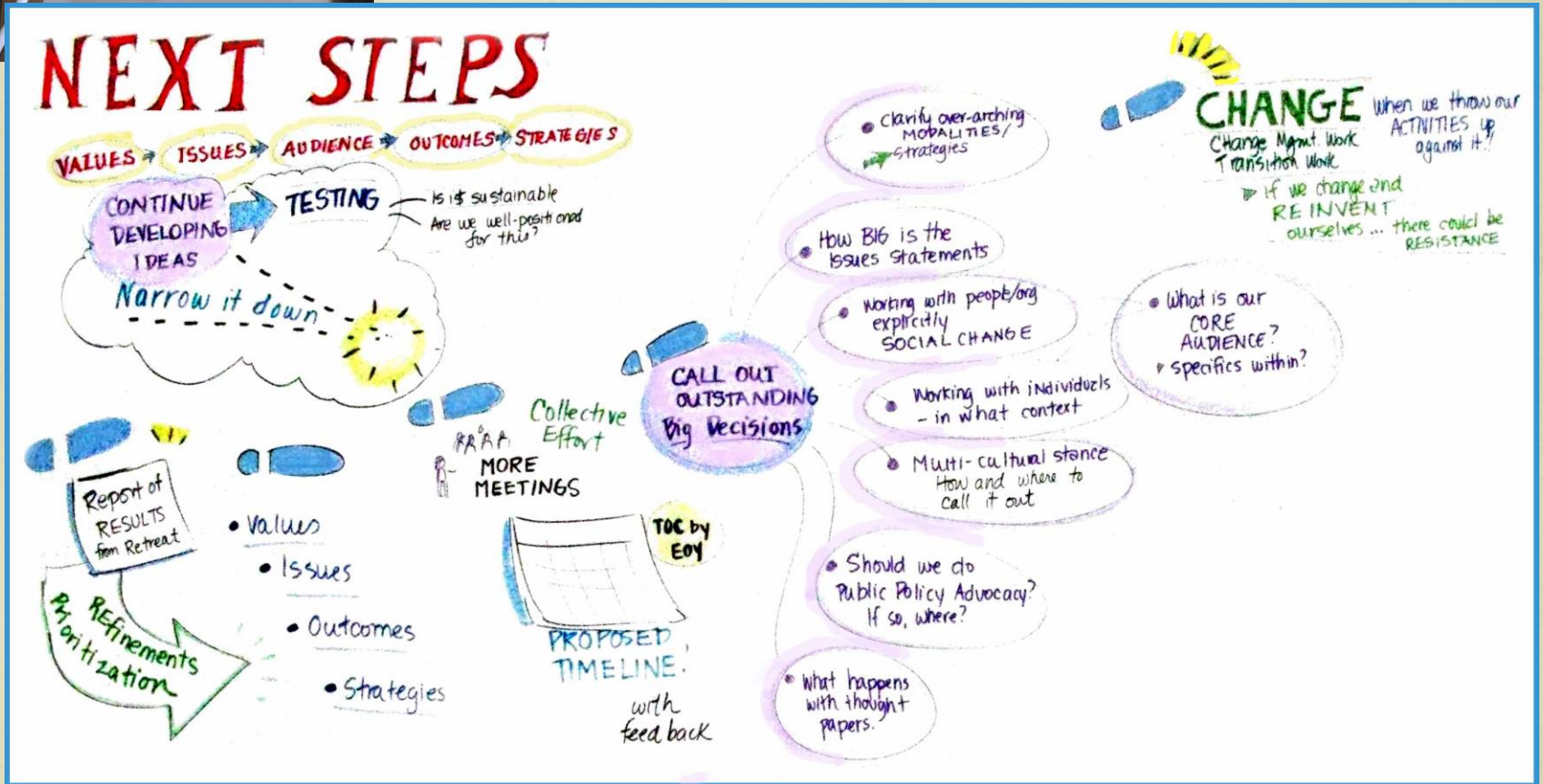


# Framing/Capturing/Illustrating





# Documenting



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## Ways In Which Graphic Recording Supports Evaluation



# How can visual language be useful in evaluation practices?

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- ▶ To “push” information towards people
  - ▶ To “pull” information from people
  - ▶ To dialogue about a co-created picture
- connecting  
people so they  
think together**

## “Graphic Summaries” can be...

- ▶ Part of the final report to policy makers, the public
  - ▶ Included in presentations about the project
    - ▶ Integrated into the website

# What makes visual language useful in evaluation?

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- ▶ Pictures worth a thousand words
- ▶ A universal “language” -- Cuts across language, educational, cultural differences
- ▶ Depict the gestalt of the situation being described
- ▶ Relationships between concepts are more easily depicted
- ▶ Grabs your attention; It's different
- ▶ “I see what you mean” (the power of the symbol)