

VISUAL TEMPLATES

How to get started



This booklet has been produced and drawn by Ia Brix Ohmann, OVERLAP.DK in July 2019 (translated from Danish). More information can be found at www.overlap.dk.

The booklet is the second in the series, "How to get started".

The idea for *Visual templates: How to get started* grew out of a collaboration with **Mia Pallisgaard Hansen** from Procesværkstedet and **Johanne Brix Kirkegaard** from Region Hovedstaden about a workshop on visual templates that was held at the EuViz Conference in 2018.

Print: PRInfoParitas A/S, Rødovre, Denmark.

WHAT IS A VISUAL TEMPLATE?



An overview that shows how a project was developed with blank space provided for more input

A template is a drawing that helps organize input, knowledge and experiences visually.

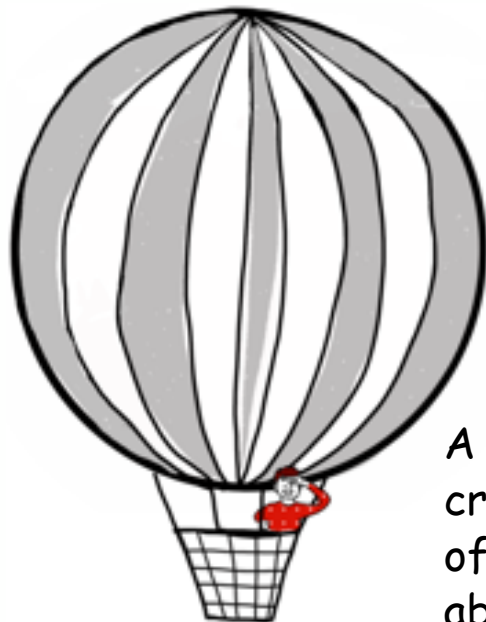
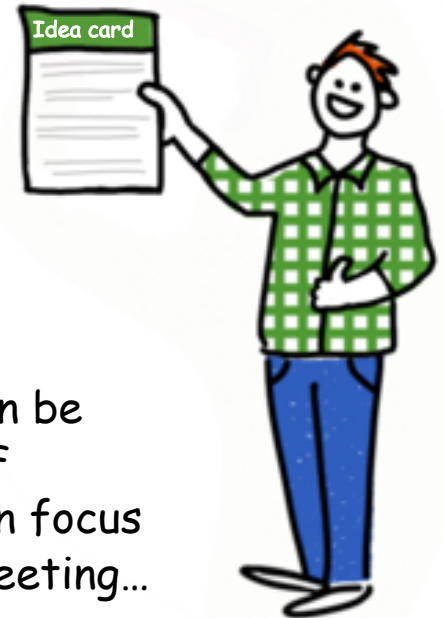
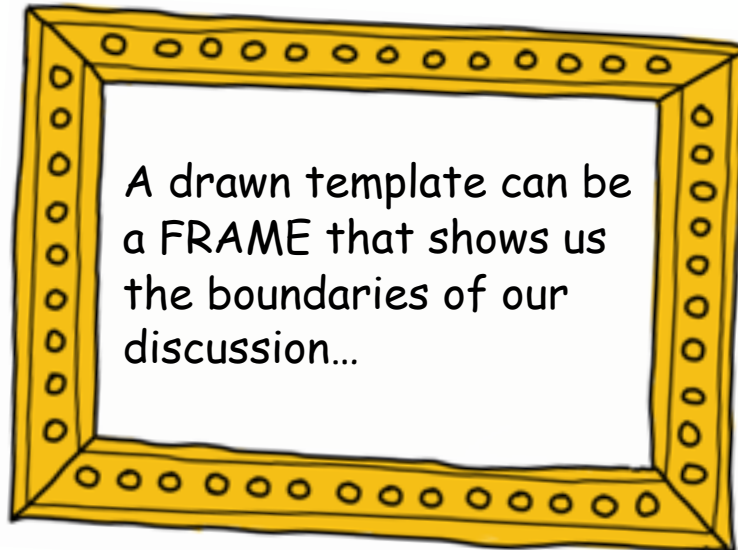


A reflection card with questions or themes and space for making notes

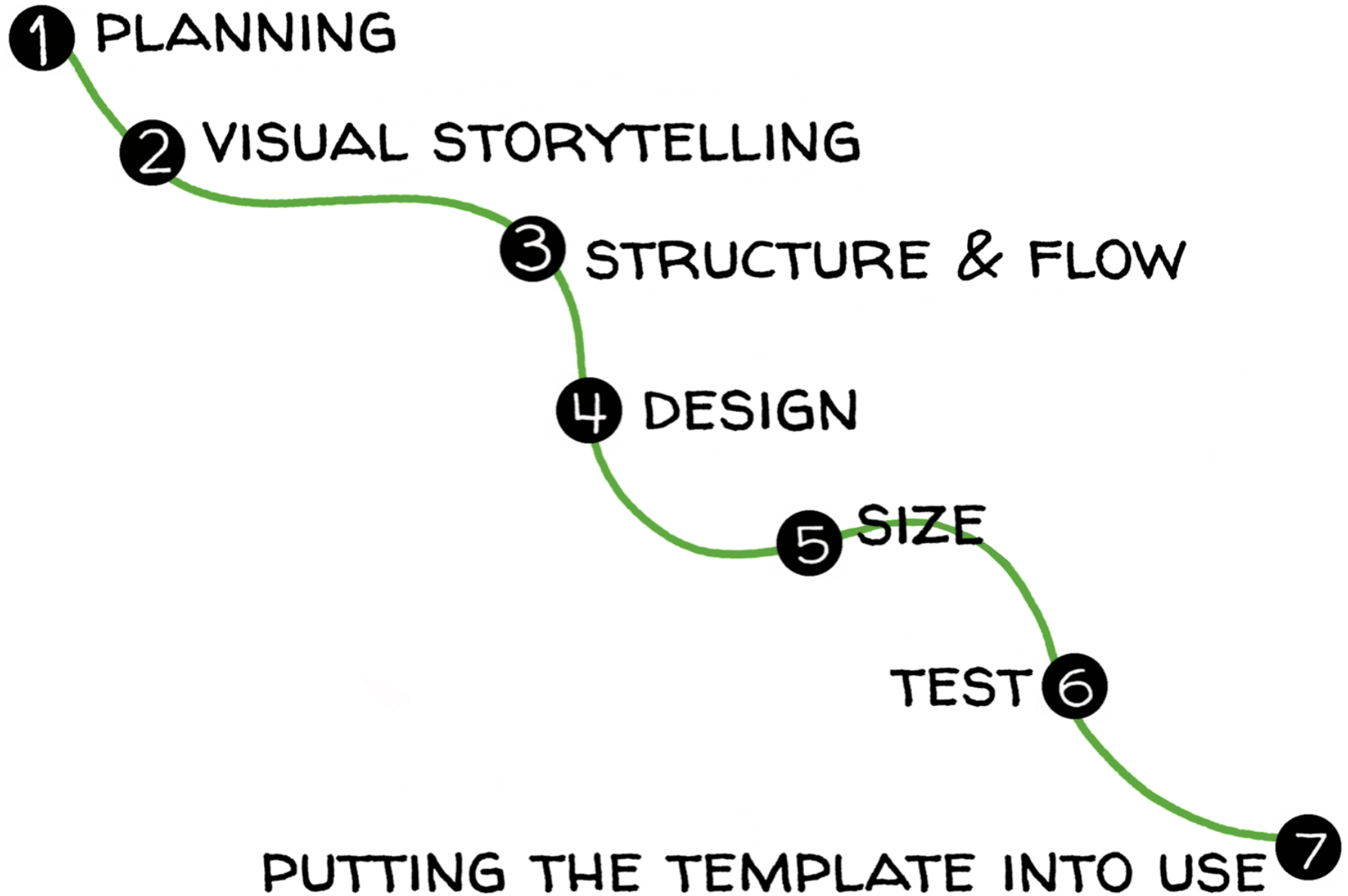


A poster that participants can fill out together

WHY USE A VISUAL TEMPLATE?



STEP-BY-STEP



PLANNING

Consider the following questions:

- What is the purpose of the meeting or event where the template will be used?
- Who is going to use the template?
- When is the template going to be used?
- Which information is important to collect?
- Which format and size is appropriate?
- Which icons and metaphors can be used?
- Will the template be re-used again after the meeting?



Are the special **key questions** or themes that will be addressed at the meeting or during the process?

These questions or themes are important to incorporate in the template.

VISUAL STORYTELLING

Can we illustrate the purpose of the meeting by using a metaphor*?

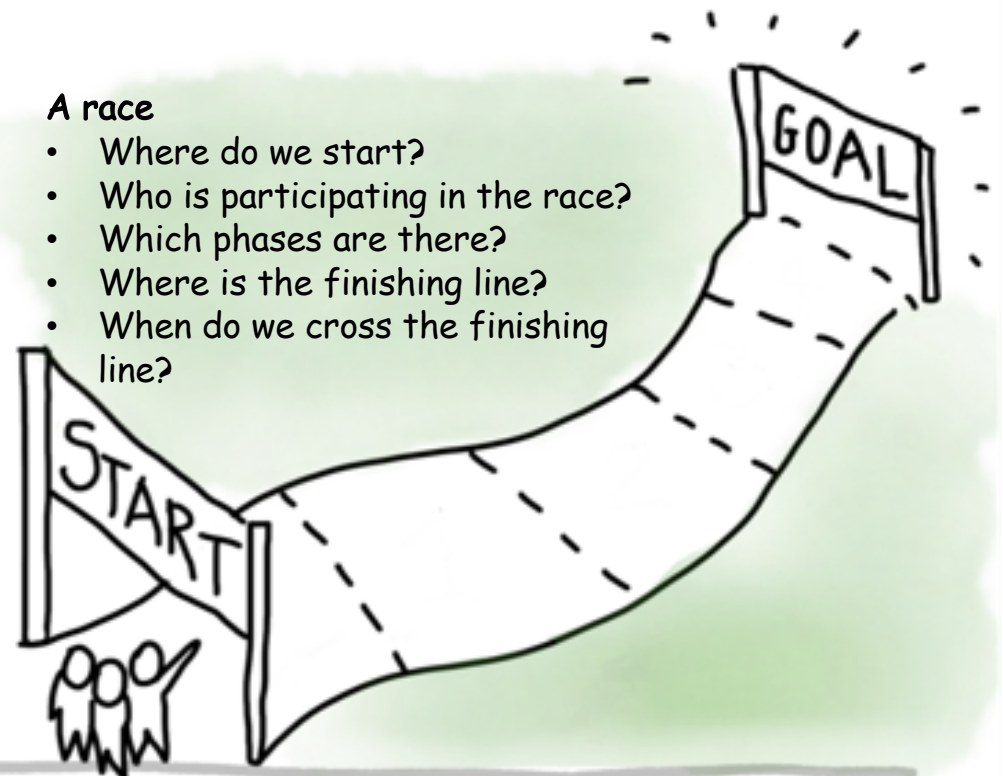
Space rocket

- What fuels us?
- Who is navigating the rocket?
- Where are we going?
- Are there phases where we can let go of parts of the rocket?
- What can we see when we are looking at things from afar?



A race

- Where do we start?
- Who is participating in the race?
- Which phases are there?
- Where is the finishing line?
- When do we cross the finishing line?



Iceberg

Above the surface:

- What is visible?
- What is the apparent problem?
- What is the apparent cause?

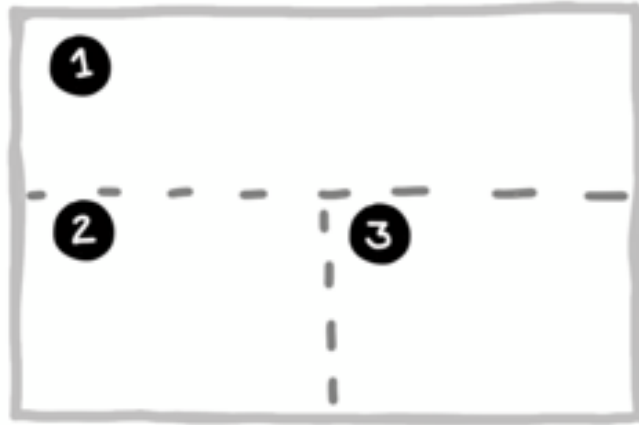
Under the surface:

- What is invisible - under the surface?
- What are the root causes?
- Tendencies and structures

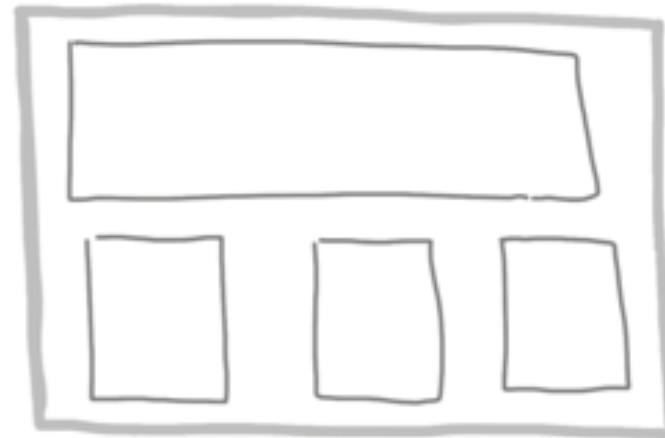
*A metaphor is a verbal picture that compares and transfers characteristics and meaning from one thing to something else

STRUCTURE & FLOW

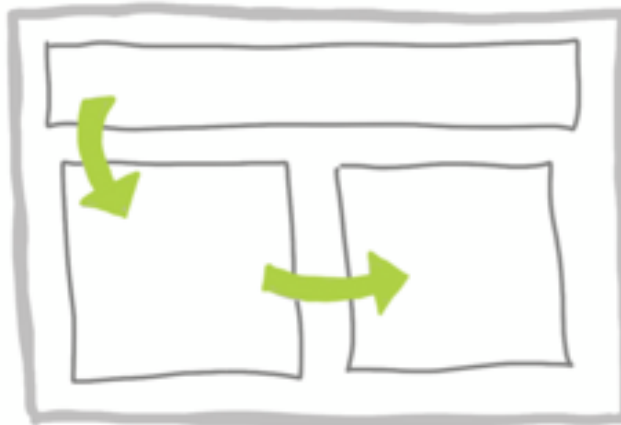
Divide the template into sections that are clearly marked



Make sure that there is ample white space between the separate parts



Use numbers and arrows to indicate how to read the template



Be careful not to use too many boxes and elements in the template



DESIGN

TITLE

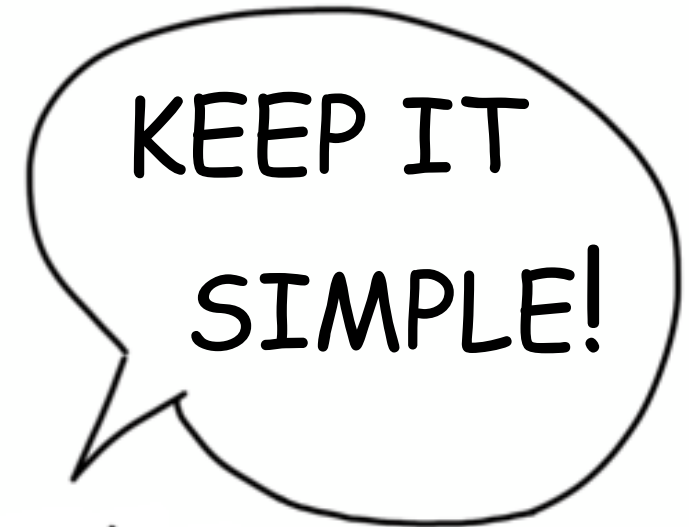
- What is the title of the meeting/the part of the meeting where the template will be used?
- Write the title with black or dark colors and use CAPITAL letters

Questions

- Which central questions need to be answered? Make sure there is enough space for participants to draw or write their answers
- What other information needs to be collected? E.g. the names of the people in the group?

Subtitles and icons

- Give the different parts of the template clear subtitles
- Use small icons to make it clear what the different parts are about



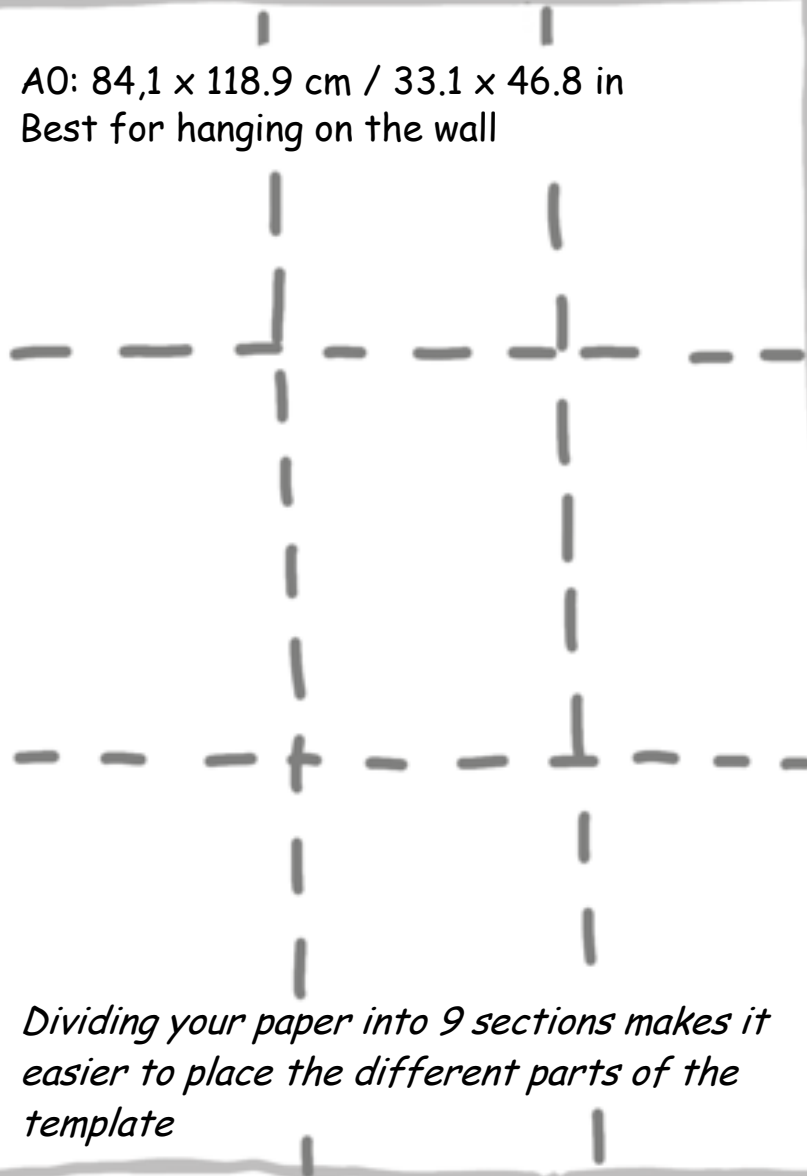
Color



- Be aware that colors can "close" the template so that there is less space for participants to use
- There should be lots of white space

SIZE

A0: 84,1 x 118.9 cm / 33.1 x 46.8 in
Best for hanging on the wall



Dividing your paper into 9 sections makes it easier to place the different parts of the template

A1: 59.4 x 84,1 cm / 23.4 x 33.1 in
Can be used as a "table cloth" on a table with 7-10 persons

A2: 42,0 x 59,4 cm /
16.5 x 23.4 in
Can function as a poster for 4-6 people

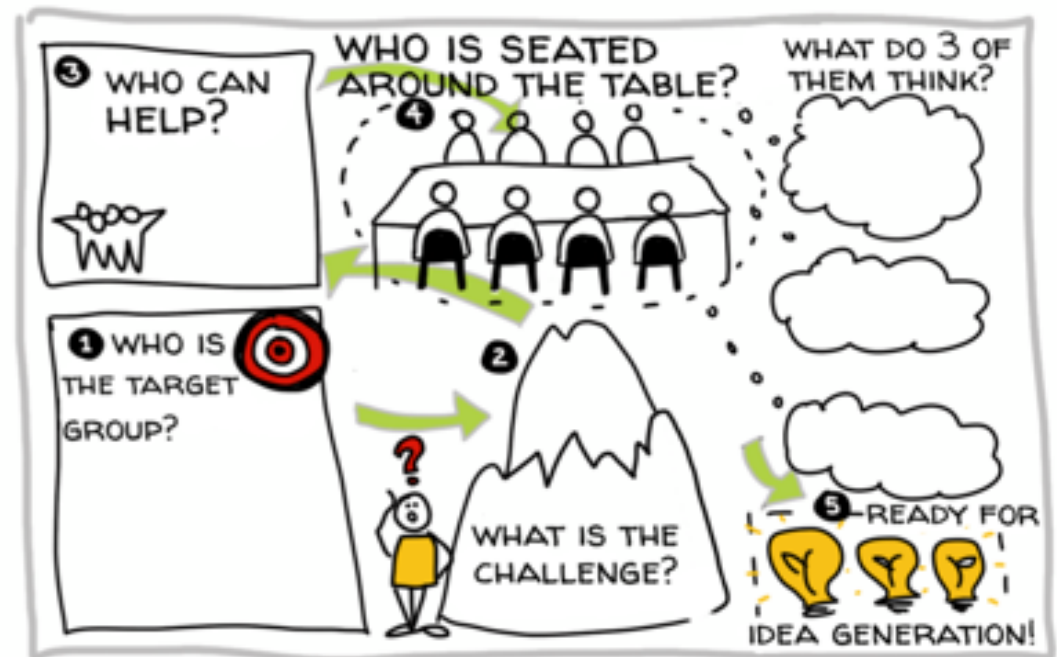
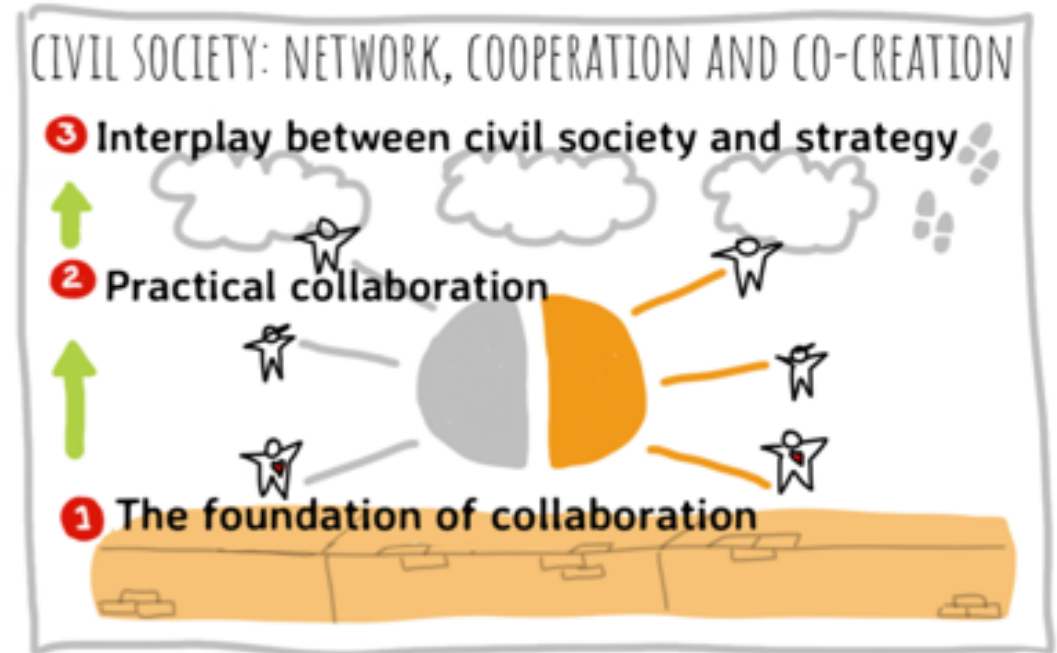
A3: 29,7 x 42,0 cm /
11.7 x 16.5 in
For the reporter's notes or for individual participants' notes

A4: 21,0 x 29,7 cm /
8.3 x 11.7 in
Hand out for each participant

A5:
14,8x21,0 cm /
5.8 x 8.3 in
Dialog card 8

TEST

- Before you print a whole bunch of templates for your next workshop TRY it out for yourself - do you have enough space to write?
- Can you understand and answer the questions?
- Consider having someone not involved in planning the meeting test the template
- Be aware that even though you CLEARLY write numbers and arrows that show how the template is meant to be used step by step, most people with a western background will read from the upper left corner
- Give participant clear instructions regarding where to start



PUTTING THE TEMPLATE INTO USE

Make it easy for participants to use the template:

- Make the template easy to RE-USE either as a print from a PDF-file or as a drawing that is easy to reproduce on a white board



- Make an instruction sheet that makes clear what participants should be doing in each part of the template

- 1 WHO ARE THE BENEFICIARIES?
 - Which resources and needs do they have?
- 2 WHAT IS THE CHALLENGE?
 - Identify a need or challenge you'd like to address
- 3 WHO CAN CONTRIBUTE?
 - Who knows your target group?
 - Who has an interest in your challenge?

Instruction sheet

- Show an example of a FILLED OUT template and hang it on the wall

- Make small dialog cards that contain the central questions associated with each part of the template



Dialog cards



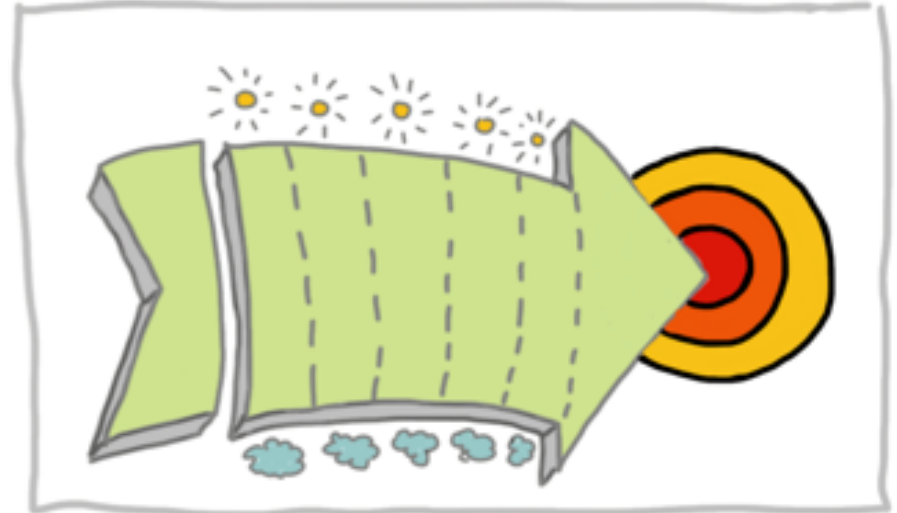
Filled out template

MORE INSPIRATION

SWOT



PROJECT PLANNING



ROOTS, VALUES, ACTIVITIES

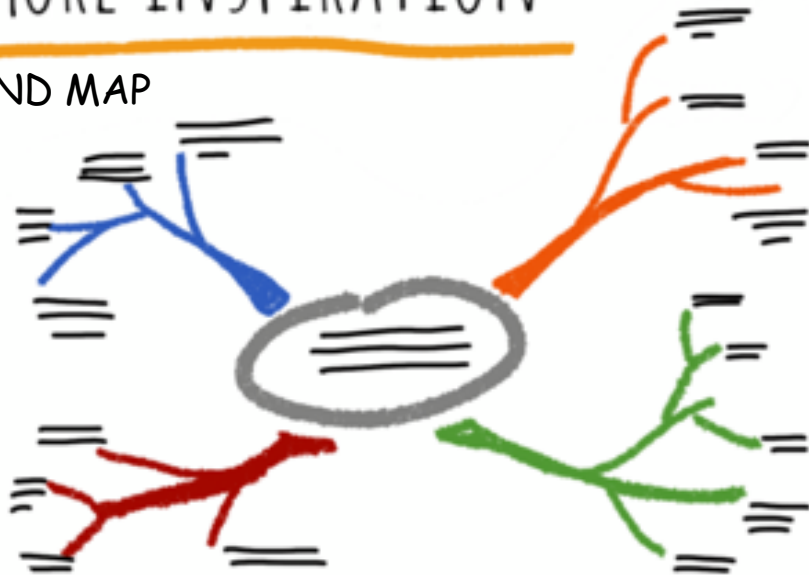


SHIP/JOURNEY

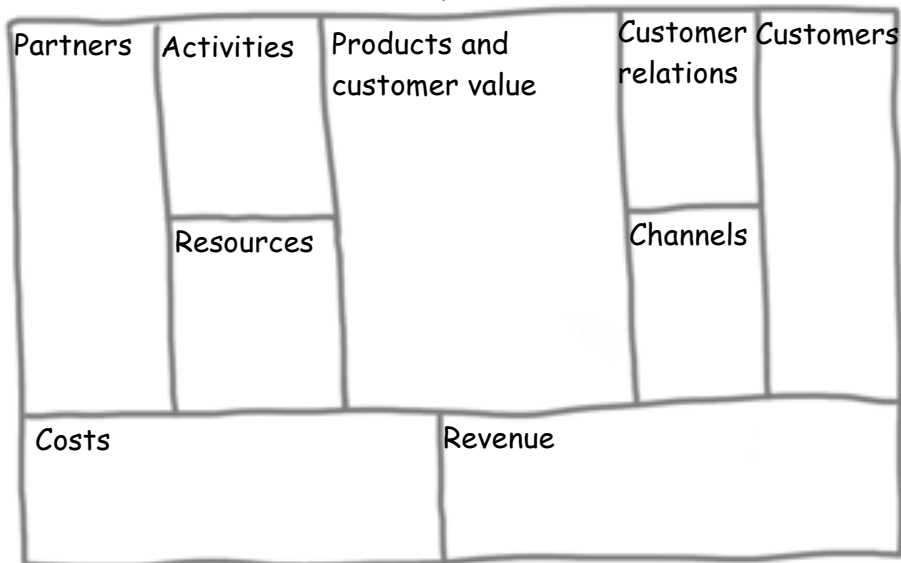


MORE INSPIRATION

MIND MAP



BUSINESS CANVAS MODEL



READ MORE



David Sibbet (2010)



Martin Haussmann (2014)



Willemien Brand (2017)



GROVE.COM

MASTERFACILITATOR.COM/CANVAS-COLLECTION

MASTERFACILITATOR.COM/CANVAS-COLLECTION-2



Graphic Facilitation

VISUAL TEMPLATES

A visual template is a drawing that helps organize input, knowledge and experience visually.

It is a framework that creates an overview and focus.

A template can be produced ahead of time, so that our focus is on facilitating.



Overlap.dk develops creative solutions that engage people and produce results. We focus on social innovation, volunteer communities and graphic facilitation.