In many groups, participation is not balanced. A few people do most of the talking, while others sit and listen. This pattern shifts dramatically when people’s ideas are written on flipcharts where they can be seen by everyone.

ChartWriting strengthens full participation in several ways. First, it validates. Recording people’s words gives them the message, “This is a valuable idea.” And when their ideas are valued, people feel valued. This is the central benefit of ChartWriting: it lays a foundation for a spirit of mutual respect.

Second, ChartWriting provides participants with a group memory* – a written record that can be kept visible throughout the meeting. This extends the limits of the human brain. A vast amount of scientific research has shown that most people can retain roughly seven items of information in their short-term memory. Once a person’s short term memory is full, s/he simply cannot absorb another idea – nor can s/he easily create new ideas – without forgetting something. (For example, you can probably remember a new friend’s seven-digit phone number by repeating it over and over; but try remembering two new phone numbers at once!) In a meeting this can pose a real problem. Typically, people hang onto the ideas they care about, and let the rest float in one ear and out the other. ChartWriting solves this problem. Participants know that if they forget something, they can look it up on the chart. This frees the mind and supports people to keep thinking. (For a detailed discussion on the benefits of using a group memory, see “The Case For A Group Memory” by Michael Doyle and David Straus in How To Make Meetings Work, pages 38-48, New York: Jove Press, 1982.)

It is important to recognize that ChartWriting is not merely a tool for keeping the record of a meeting. Primarily it is a vehicle for encouraging full participation. It equalizes and balances. It enlivens the discussion. It helps people work toward understanding and integrating each other’s points of view. In summary, it is one of the facilitator’s most fundamental tools for supporting groups to do their best thinking.

* The term “group memory” was coined by Geoff Ball, a California specialist in multi-party conflict resolution. He is the founder of RESOLVE, one of the nation’s first consulting firms to promote collaborative problem-solving as an alternative to litigation.
LETTERING

1. PRINT YOUR LETTERS
UNIFORM, CAPITAL LETTERS are easiest to read quickly. Using upper and lower case letters is fine if your penmanship is legible. Writing in cursive may be slightly faster, but taking a few extra seconds to print will make your text much easier to read.

2. MAKE THICK-LINED LETTERS
Use the wide end of the marker tip. Press firmly against the paper. Firm, thick-lined lettering is much more visible from a distance than soft, thin-lined lettering.

3. WRITE STRAIGHT UP AND DOWN
Straight lettering is easier to read than slanted lettering.

4. CLOSE YOUR LETTERS
Don’t leave gaps in letters like B and P. Letters without gaps are easier on the eyes. Closing your letters helps people read more before they get tired.

5. USE PLAIN, BLOCK LETTERS
Letters without curlicues are easier on the eyes. Fancy script slows down reading time, so it should be saved for occasional special effects.

6. PRACTICE MAKES PERFECT
If your printing isn't perfect, don't panic – practice!

A painless way to improve lettering is to practice whenever you might otherwise be doodling or taking notes, or writing grocery lists, memos, love letters – whatever. Habits you develop with pen and paper will transfer to the flipchart.*

* Thanks to Jennifer Hammond-Landau, noted San Francisco graphic facilitator, who gave us this tip in 1982!
1. ALTERNATE COLORS
People read faster, retain more, and have a longer concentration span when the text is written in two or three colors, so alternate colors frequently. But remember: it’s not necessary to follow a pattern in your alternation. The goal is simply to break up the monotony.

2. USE EARTH TONES FOR TEXT
The earth tones, also called the “soft colors,” are blue, brown, purple and green. They are easier on the eyes.

3. USE HOT COLORS FOR HIGHLIGHTING
The “hot colors” are orange, red, yellow, and pink. They are harder on the eyes and should be reserved for borders, shading, underlining, and for special symbols like arrows or stars. Note also that yellow is very difficult to see at a distance.

4. AVOID BLACK
Reserve black for numbering pages. It’s too heavy and dense for much else.

5. BEWARE OF COLOR CODING
Beginners often try to organize their work by color coding – one color for headings, a second color for key points, a third for sub points, etc. This usually turns into a mixed-up mess. A group’s thinking process is generative and dynamic – its categories keep shifting as people build on each other’s ideas. “Rough-draft thinking” is not the time for color coding. By contrast, color coding is very effective with documents like agendas that are created before the meeting begins, or whenever the content of the document is known in advance.

6. USE THE ChartWriter's Grip TO HOLD 4 MARKERS AT ONCE
The ChartWriter's grip involves sticking a marker between each finger on the hand you don't write with. Keep the tops off and point the ink-tips outward. This way you are ready for action with any color!
1. **Bullets**
   Bullets are big dots that make items stand apart from one another. Use them often – especially when listing ideas.

2. **Stars**
   A star indicates that something is especially noteworthy.

3. **Borders**
   Borders have a pleasant visual impact. They can be used to frame a whole page, or to highlight certain blocks of text, or a title. Pink or orange borders work beautifully.

4. **Circles**
   Circles can do many things, such as:
   - lasso one idea and connect it with another;
   - draw attention to a decision that has been made;
   - highlight the most important issue on the page;
   - separate and categorize information on the page;
   - break up the visual monotony of a page full of text.
5. **ARROWS**

An arrow is a very powerful symbol. For example, you can use arrows to demonstrate that:

- Idea A and Idea B are a vicious cycle;
- Idea 1 comes first, Idea 2 comes second;
- Ideas X, Y and Z all belong to Topic Q.

Arrows create automatic connections. Make sure the connections are actually being suggested by group members. If the group thinks you are connecting ideas for them, you will lose your neutrality. They may resent you or feel manipulated.

6. **OTHER SYMBOLS**

Many ideas can be expressed with simple drawings.

* The “Star-Person” was created by David Sibbet, who has developed a large family of easy-to-draw Star-People. See David’s *Fundamentals of Graphic Language Practice Book*, San Francisco: Grove Consultants, 1991.
1. LETTER SIZE
One inch is a good height for letters. If the group is very large, some people will be sitting far away and you may have to write larger.

2. MARGINS
Margins should be at least two inches on all four sides of the page. Having empty space near each line of text encourages members to edit, or add to their previous ideas. This space is also useful for tallying votes – as, for example, when group members prioritize a long list of ideas.

3. BETWEEN LINES
Leave at least one inch between lines of text.

4. INDENTING
Indenting is nice looking and easy to read – especially when each indented line starts with a bullet.

5. UNDERLINING
Leave three inches below underlined words.

6. WHITE SPACE
White space is your friend. An open, spacious page looks inviting and gives the group a breezy feeling about its work. Crowded pages look hectic and heavy. Use as much paper as you need to give the group an expansive canvas upon which to paint their thinking.

7. DON'T CROWD THE BOTTOM OF THE PAGE
Make sure the size and spacing of your writing is the same at the bottom of the page as it is at the top.
Start a new page before you really need to, because a group will lower their output at the end of a page. Participants often behave as if the task is finished once the page is full. If you start a new page, it is amazing how frequently people catch a second wind and start generating new material.
1. **THE LIST**

   The list is the most common format. It consists of a title, or heading, followed by a series of items. A list often has subtitles with items under each one. Put a bullet in front of each item.

2. **THE MATRIX**

   A matrix is a grid with headings placed both horizontally (across the top) and vertically (along the left side). A matrix can be used to help a group discuss relationships between two or more variables.

3. **THE FLOW CHART**

   A flow chart can describe how something works, or it can show a sequence of events.
4. **THE ORBIT DIAGRAM**

An orbit diagram can highlight a key point and describe others in a less linear way.

5. **FORMATS FOR OPEN DISCUSSION**

If you are recording an unstructured, open discussion, you may not be able to use a structured format.

When you are using a pad of paper on an easel, the safest approach is to *skip three or four lines* after each new thought. As the conversation goes along, you will often want to go back to fill in the blank spaces.

When you are cutting sheets from rolls of paper and have lots of space, you may find the following approach valuable:

- Mentally divide the sheet of paper into five sections. Do not actually draw the sections on the paper. (The illustration below is only meant to show you, the reader, the arrangement of the sections.)

```
1
2
3
4
5
```

- As you record the discussion, put each completely new theme into a different section. Within each section, record using the list format. *Leave the center section blank.*

- As the discussion moves along, group members often notice that they can use the center space to list central themes of the discussion.
DECIDING HOW MUCH TO WRITE

<table>
<thead>
<tr>
<th>WHAT TO LISTEN FOR</th>
<th>HOW TO WRITE IT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Suggestions</strong></td>
<td></td>
</tr>
<tr>
<td>Example: “Let’s check in daily between now and the conference.”</td>
<td>CHECK IN DAILY TILL CONFERENCE</td>
</tr>
<tr>
<td><strong>Logical Connections</strong></td>
<td></td>
</tr>
<tr>
<td>Example: “In this organization, it’s clear to me that absences and low morale are related to one another.”</td>
<td>ABSENCES LOW MORALE</td>
</tr>
<tr>
<td><strong>Summary Statements</strong></td>
<td></td>
</tr>
<tr>
<td>Example: “So what we’re saying is that we want this program to target both teachers and parents.”</td>
<td>TARGET GROUP: TEACHERS AND PARENTS</td>
</tr>
<tr>
<td><strong>Unanswered Questions</strong></td>
<td></td>
</tr>
<tr>
<td>Example: “I know this is off the subject, but I’m still confused about whether we’re ever going to hire a new financial assistant.”</td>
<td>★ HIRE FINANCIAL ASS'T?</td>
</tr>
</tbody>
</table>

Don’t worry about capturing every word a speaker says – just be sure to preserve the meaning of what has been said.
1. SENTENCES ARE EASY TO READ
   "Send note to caterer" is much easier to understand than "note to caterer" because it includes a noun and a verb. Here's the guideline: will this be understandable in a week?

2. DON'T BE SHY—WRITE "WE" AND "I"
   Some beginners feel awkward using these pronouns. For example, instead of writing "We want a meeting," a beginner might write "They want a meeting" or "You want a meeting." Remember: it's the group's record – write with their voice.

3. VERBS AND NOUNS ARE HIGH PRIORITY
   Example: If you hear "I hope we remember to write a warm thank you note to that great caterer," get the key verbs and nouns first – "Remember: send note to caterer."

4. ADJECTIVES AND ADVERBS ARE LOW PRIORITY
   It's fine to write the adjectives and adverbs – like "warm" and "great" in the example above – but only if you have the time.

5. USE ONLY STANDARD ABBREVIATIONS
   Do not invent abbreviations in order to write faster. For example, do not write "defnt" for "definite," or "expl" for "explain." Here's the guideline: will this be understandable to someone who is not at the meeting?

6. TITLE EVERY PAGE
   Every page needs a title, even if it says "[title of previous page] continued."

7. ENCOURAGE PROOFREADING
   Invite people to read over your work. Accept corrections gladly – even if it messes up your beautiful chart.
1. **CHECK PAGE NUMBERS**  
Make sure all pages are ordered and numbered understandably.

2. **CHECK TITLES**  
Add titles if you didn’t have a chance during the meeting.

3. **PUT THE LIDS BACK ON YOUR MARKERS**  
If you don’t, they’ll dry out! At more than a dollar per marker, that’s a lot of ink to waste. Besides, nothing is more irritating than getting ready for a session, only to discover at the last moment that your brown or blue marker doesn’t work.

4. **ROLL UP THE PAGES TOGETHER, AND LABEL THEM**  
Flipcharts are often brought back to the next meeting. It is difficult to hang pages that have fold-creases in them. It’s also difficult to read them. Therefore, when you’re taking charts off the wall, roll rather than fold.

Label the outside of the rolled-up paper with three items of information:
- Name of the meeting
- Date of the meeting
- Topics

- Staff Meeting
- March 2, 1996
- pp. 5–9 Unsolved Problems

5. **SECURE THE PAGES WITH TWO RUBBER BANDS**

6. **GIVE THE CHARTS TO Whomever will USE THEM NEXT**  
Hand the charts to the appropriate person, rather than putting them down. Similarly, don’t carry the charts away unless you have been assigned that responsibility.

7. **CONDUCT YOURSELF PROFESSIONALLY**  
Each of the previous six steps is an excellent opportunity to demonstrate thoroughness and efficiency. Group members will notice it. They may not acknowledge it verbally, but they will recognize that they are working with a professional.