THE KOLBE COMPANY

and Sacramento Professional Facilitators

Course Catalog

**Comprehensive training for leaders
in business, government, non-profits, and professional facilitators**

Enhance effectiveness and increase group
productivity through proven Technology of Participation methods

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COURSE OFFERINGS

Specialty Courses 25

Technology of Participation (ToP®) Courses

Technology of Participation (ToP®) Courses:
Heidi Kolbe & Company teaches Technology of Participation (ToP®) courses developed by the Institute of Cultural Affairs (ICA). These methodologies have been tested and used extensively throughout the world in many organizations and communities.

ToP® was developed by ICA to release the creativity of people to plan, think and lead to shape their own destinies. The courses are designed to be used by those in leadership positions in public and private agencies and community groups, as well as by meeting facilitators and consultants. The programs strengthen the capacities of individuals, organizations, and communities to build and implement plans for action and engagement. The work is grounded in collaborative strategies that draw upon human assets and build social capital to facilitate sustainable organizations and communities.

Foundational values of ToP®:
- Inclusive participation – Invites and sustains the participation of all members of the group. Each member holds an important piece of the puzzle and each person's insights help to create the whole picture.
- Teamwork and collaboration – Assumes teamwork and collaboration are necessary to get a task done in the most effective, efficient, and economical way. Creates a deep sense of collegiality among members of the group.
- Individual and group creativity – Brings out the best of each person's rational and intuitive capacities to build innovative solutions.
- Action – Positions the group to act on group decisions. Moves the group toward action by generating member support and commitment.
- Reflection and learning – Leads participants in deep reflection that elicits consolidation of learning and continuous improvement.
- Focus on leadership – Provides leaders with practical methods to hear from all staff, honor all ideas and create ownership for the chosen solutions.

ToP® provides structured facilitation methods to help groups think, talk, and work together:
- Recognize and honor contributors
- Deal with more data in less time
- Integrate individual contributions into useful patterns
- Welcome diversity
- Minimize polarizing conflict

ToP® courses help participants:
- Learn to energize meetings and find consensus
- Speak up – Participate in meetings
- Brainstorm – Generate useful data and synthesize into useful information
- Tackle complex issues
- Turn ideas into concrete plans
- Get results instead of circular conversations

Courses Use Adult Learning Theory:
The courses emphasize the principles of adult learning theory in which participants experience and practice the methodologies taught. The program is delivered in an interactive training environment with limited lecture and mostly conducted in an interactive seminar discussion format. For each course, there is an overview section, an interactive demonstration of the facilitation methodology, a walk-through of the steps and the theoretical framework, several practice opportunities for students to integrate learning and an application exercise for students to apply the methodology to their real-life work situations.

Improves Facilitative Leadership Competencies:
The ToP® courses develop the facilitative leadership skills needed by today's leaders to engage and inspire teams.
Fostering a Team Environment – Communication, Interpersonal Skills, Team Leadership, Consensus Building and Conflict Management
Creating Organizational Transformation – Organizational Awareness, Visioning, Strategic Thinking, Change Management and Transition Leadership
Maximizing Performance Results – Analytical Thinking, Decision Making, Customer Focus, Planning and Organizing, Thoroughness, Forward Thinking and Results Orientation
Building Trust and Accountability – Ethics and Integrity, Personal Credibility, Global Perspective and Performance Management
Promoting a High-Performance Culture – Fostering Diversity, Workforce Management, Coaching, Mentoring and Developing Performance Competencies
Building Coalitions – Create Ad Hoc Structures and Strike Forces, Grass Roots Policy, Systems, Environmental Change Implementation and Relationship Building
Implementing Innovative and Quality Improvements – Continuous Improvement, Innovation, Creative Problem Solving and Strategy Development

Use of ToP® Methods by Government Agencies:
Local, state, and federal agencies are increasingly called to have open and transparent planning processes and to be inclusive and collaborative in their work. The foundational values of ToP® provide methods to achieve these aims. ToP® methods have been used successfully by all levels of government. They are especially useful in cross-agency collaborations and dealing with complex issues.

Quality Standards for Training Courses:
Heidi Kolbe & Company adheres to the quality standards established by ICA and complies with the ICA formalized procedures for qualification of instructors and for approval of curriculum that ensure quality standards are met or exceeded. Since these trainings transfer ToP® methodologies for which ICA holds the copyright, appropriate royalty and manual fees are paid to ICA.

Quality of Courses:
  Course Development: ToP® training programs undergo several levels of quality assurance including peer review, pilot testing, revision and approval prior to being adopted as an approved national course.

In-Process Feedback: Feedback is also solicited from participants throughout the course to ensure their needs are being met. The instructors meet at the end of each day/course to debrief the training and to give each other feedback.

Training Evaluations: After each training session, instructors review participant evaluations. The instructors carefully consider participants' suggestions and often incorporate them into the curriculum, either immediately by the instructor or by the ICA Curriculum Committee as part of its regular review process. Participants send their evaluations directly to ICA for review to ensure quality control.

Quality of Instructors:

ToP® trainings require that instructors have special certification and licensing. There are two requirements.

First, the instructor must be a ToP® Certified Facilitator. Certification is an in-depth process that involves client surveys, demonstrations of facilitation skills, and preparation and evaluation of a portfolio of facilitation work. These processes ensure that the facilitator meets the core competencies and has successful field experience with a variety of clients and settings.

Second, the course instructor must be licensed by ICA to teach that specific course. Instructors must be qualified to teach each ToP® course individually. An instructor must consistently receive high ratings to retain the license to instruct ToP® courses.

ToP® has three levels of licensed instructors: Apprentice, Qualified and Mentor. Qualified instructors have completed the apprentice journey and have demonstrated to a Mentor Instructor that they can co-instruct the ToP® Facilitation Methods and ToP® Strategic Planning courses. Mentor Instructors have completed advanced ToP® course work and are authorized by ICA to teach Apprentice and Qualified Instructors. Heidi Kolbe & Company uses only Qualified or Mentor Instructors.

The Kolbe Company instructors are licensed by ICA to provide ToP® courses. Heidi Kolbe is a Certified ToP® Facilitator and is licensed to teach these courses. Also, she is a Mentor Trainer who mentors and qualifies other ToP® Instructors in these courses. Heidi is a highly skilled, nationally recognized instructor and trainer, who has provided off-the-shelf and customized training programs to government agencies, businesses and professional associations.

Course Delivery:

Courses with ten or more participants must be delivered by at least two licensed instructors who are required to provide improvement feedback to each other and ICA. Most ToP® courses are delivered by two licensed instructors. The higher instructor to participant ratio provides greater individual attention to participants, in-depth practice opportunities and increased instructor experience to draw from.

Reference Manuals:

Participants receive in-depth training manuals in almost all courses. The manuals provide:

1. Step-by-step instructions of the methodology.
2. The rationale for the techniques and foundational theories of the methodology.
3. Tools, templates, illustrations, and models to use in design and facilitation.
4. Thorough explanations of the processes and countless examples.
5. References for later use.
6. Information about how to go deeper in learning and using the methodology.

In lieu of a manual, Accelerated Action Planning uses an engaging website with videos and templates.

Section One

Key Concepts in
Facilitating Meetings

Meetings That Work

Description: Using a mix of theory, real-life experiences, and hands-on application, this course teaches practical tools to design and lead effective meetings that are productive rather than frustrating. These tools transform boring meetings into energizing events focused on priority topics that move vital projects forward, create full participation that utilizes the expertise of everyone in the room, and maximizes input, decision making, and commitment. The diversity in the group becomes one of its greatest assets.

This course has four modules.
1. **Creating participatory meetings:** participation at its best, levels of involvement in decision making and facilitating brainstorming.
2. **Planning agenda items:** agenda design and creating facilitation plans to address each agenda item.
3. **Designing meetings and events:** keys to healthy communication, preparing for meetings and creating meeting designs.
4. **Facilitating meetings:** stages of the group's journey, social styles, the facilitator's role, dealing with challenging situations and personal action planning.

Outcomes:
- Learn 74 meeting tools and techniques.
- Create a participatory environment.
- Learn the S.T.E.P.S. to a better meeting: space, time, eventfulness, products and style.
- Gain confidence as a facilitative leader.

Benefits:
- Transform meetings to energizing events people want to attend because they get vital information and participate in important discussions.
- Move vital projects forward.
- Maximize input, decision making and commitment.
- Create good products, high commitment and immediate action.
- Participants become clear on the tasks, and leave committed to results and action.

Who Should Take this Course:
- Facilitators, trainers and consultants
- Those beginning their facilitation journey
- Those who lead or attend many meetings
- Organizational leaders and managers responsible for strategic and operational planning
- Project managers responsible for organizational operations and project implementation
- Community leaders who are planning and implementing action campaigns
- Local, state, and federal leaders responsible for program development, project implementation, and policy formation

Course Length: Two days

Prerequisite: None

Section Two

Three Core Methodologies
in the Technology of Participation

The Three Core ToP® Methodologies

There are three foundational ToP® Facilitation Methodologies:
1. **The ToP® Focused Conversation** provides a context for meaningful communication. It is used to facilitate group discussions, which allow members to share diverse perspectives in a productive and non-confrontational manner. It's helpful to move a group to action.
2. **The ToP® Consensus Workshop** facilitates group consensus-based decisions that respect the diversity of perspectives within the group, inspire individual action and move the group toward joint agreement and action.
3. **The ToP® Action Planning process** is an approach to planning an event or project. This process clarifies and delineates the tasks, and aligns the creativity, capabilities, interests and resources of the group. The group decides necessary actions, roles and responsibilities. The process builds group trust, support, enthusiasm, and consensus.

These three methodologies can be combined in thousands of ways to meet facilitation needs, are the basis for all other techniques and are the underpinning of all other ToP® courses. Therefore, there are several courses that teach all or one of the core methodologies.

Courses that teach all three methodologies:
1. ToP® Facilitation Methods: Leadership Edition, page 11, 3 days
2. ToP® Facilitation Methods, page 12, 2 days

Recommendation: Take the Leadership Edition 3-day course if possible. The 3-day format allows each participant to have hands-on practice with each method. There's more time for reflection and planning. Participants are much more likely to put the training into use quickly.

Courses that focus on just one of the methodologies:
1. ToP® Focused Conversation, page 13
2. ToP® Focused Conversation: Brain Based Leadership, page 14
3. ToP® Consensus Workshop, page 15
4. ToP® Action Planning and Accelerated Action Planning, page 16
5. ToP® Accelerated Action Planning, page 17

These are often offered as in-house courses. The Focused Conversation and Accelerated Action Planning are the ones most likely to be offered as public courses.

Course that provides follow-up and new materials on all three core methodologies:
1. Virtual ToP® Application Design, page 18

ToP® Facilitation Methods: Leadership Edition

Description: Teaches the three ToP® Facilitation Methodologies that are the basis for all other ToP® courses.

1. **The ToP® Focused Conversation** provides a context for meaningful communication. It is used to facilitate group discussions, which allow members to share diverse perspectives in a productive and non-confrontational manner. It's helpful to move a group to action.
2. **The ToP® Consensus Workshop** facilitates group consensus-based decisions that respect the diversity of perspectives within the group, inspire individual action and move the group toward joint agreement and action.
3. **The ToP® Action Planning process** is an approach to planning an event or project. This process clarifies and delineates the tasks, and aligns the creativity, capabilities, interests and resources of the group. The group decides necessary actions, roles and responsibilities. The process builds group trust, support, enthusiasm, and consensus.

The focus is on learning participatory leadership skills to effectively lead in a team environment, as well as, lead multi-disciplinary collaborations and interagency projects. Provides effective methods to lead high-level policy discussions and decision-making essential for strategy development. Teaches proven ways to achieve group participation including effective conversations, gaining consensus and motivating action.

Outcomes:
- Teaches a structured process to lead a meaningful exchange of ideas and make critical decisions together.
- Provides a framework to discuss and resolve difficult issues.
- Provides problem-solving techniques to bring many diverse ideas into a consensus.
- Develops action plans in a fraction of the time needed by traditional methods.
- Provides extensive opportunities to each participant for hands-on practice of all the methods, coaching from the trainers and feedback from other participants.
- Creates a rich, vibrant and comfortable coaching environment.

Benefits:
- Engage and motivate staff and team members.
- Save time and money with increased productivity.
- Produce confidence in leading staff and project teams.
- Heighten effectiveness in leading team communication and input sessions.
- Gain higher engagement, motivation, and greater results from teams.

Who Should Take this Course:
- Leaders with complex issues to resolve that need diversity of talent
- Leaders needing to align teams toward a shared vision
- Project managers and team leaders
- Local, state, and federal leaders and program managers
- Facilitators, trainers and consultants

Course Length: Three days

Prerequisite: None

ToP® Facilitation Methods

Description: Demonstrates proven ways to achieve group participation including effective conversations, gaining consensus and motivating action. Teaches the three ToP® Facilitation Methodologies that are the basis for all other ToP® courses.

1. **The ToP® Focused Conversation** provides a context for meaningful communication. It is used to facilitate group discussions, which allow members to share diverse perspectives in a productive and non-confrontational manner.
2. **The ToP® Consensus Workshop** facilitates group consensus-based decisions that respect the diversity of perspectives within the group, inspire individual action and move the group toward joint resolve and action.
3. **The ToP® Action Planning Process** is used to plan an event or project. This process clarifies and delineates the task and aligns the creativity, capabilities, interests, and resources of the group. The group decides necessary actions, roles, and responsibilities. The process builds group trust, support, enthusiasm and consensus.

Outcomes:
- Learn a structured process to lead a meaningful exchange of ideas and make critical decisions together.
- Learn proven methods to shape and ask questions that stimulate candid feedback and discussion.
- Obtain a framework for any group process, from a small workshop to a multi-day conference.
- Obtain problem-solving techniques to bring many diverse ideas into a consensus.
- Develop action plans and strategies in a fraction of the time needed by traditional methods.
- See the three methods demonstrated.
- Volunteers receive coaching in applying the methodologies through hands-on practice.

Benefits:
- Engage and motivate groups for action.
- Save time and money with increased productivity.
- Increase confidence in facilitating team meetings.
- Heighten effectiveness in leading team communication and input sessions.
- Gain higher engagement, motivation and greater results from teams or community groups.

Who Should Take this Course:
- Experienced group facilitators and leaders
- Organization, project and team leaders
- Educators and health practitioners
- Active citizens and community workers
- Process consultants
- Local, state, and federal program managers

Course Length: Two days

Prerequisite: None

ToP® Focused Conversation

Description: This common-sense approach leads naturally to a meaningful exchange of ideas and is helpful to conduct purposeful discussions, capture a group's best thinking, stimulate candid feedback, surface new ideas and build creative solutions. Participants learn how to design and facilitate effective meetings.

This method is helpful when gaining participation is key to success. It helps participants dive below the surface to explore the depth issues. Enables group members to be on the same page so they can take action. It can also be used by individuals dealing with controversial issues.

There are thousands of appropriate situations to use this tool, including:
- Decision making
- Managing and supervising
- Evaluating and reviewing
- Preparing, designing and planning
- Coaching and mentoring
- Interpreting information
- Celebrating and recognizing achievement

Outcomes:
- Quickly reach a full picture of an individual's or a group's purpose, needs, and intentions.
- Create a shared awareness regarding a topic or issue.
- Gather pertinent information for important planning decisions.
- Integrate group knowledge and diverse points of view.
- Lead an engaging and highly participatory process.

Benefits:
- Fosters deeper understanding, alignment and inclusion among team members.
- Establishes a foundation for developing consensus and action.
- Increases a group's awareness of each other's perspectives, thoughts, emotions, interpretations and comfort in moving forward.

Who Should Take this Course:
- Those who want to lead meaningful and productive conversations
- Facilitators, trainers and consultants
- Business leaders
- Local, state, and federal leaders and program managers
- Managers
- Team leaders

Course Length: One day

Prerequisite: None

ToP® Focused Conversation Method: Brain Based Leadership

Description: This course teaches the powerful Focused Conversation method described on page 13 but also includes new thinking from neuroscience. Knowledge of how the brain works now proves the effectiveness of the Focused Conversation. This information explains not only why the Focused Conversation is so effective but gives information on how to make it even more useful. It provides information on how to target communication to brain preferences.

Assists in:
- Making good use of people's time.
- Capturing a group's best thinking quickly.
- Surfacing new ideas and solutions.
- Understanding how the brain works and processes information.

Outcomes:
- Design and lead brain-friendly conversations.
- Quickly reach a full picture of the group's purpose, needs, and intentions.
- Establish a foundation for developing consensus and planning for the future.
- Gather pertinent information for important planning decisions.
- Integrate group knowledge and points of view.
- Lead an engaging and highly participatory process.

Benefits:
- Increases awareness of individual participant's brain preferences.
- Increases group's awareness of brain preferences and ways to communicate with diverse groups.
- Provides deeper understanding, alignment and inclusion.
- Fosters depth discussions to reach better decisions.
- Maximizes group commitment and involvement.

Who Should Take this Course:
- Those who want to tap a team's brain power in leading meaningful and productive conversations
- Business leaders
- Strategic planners
- Managers
- Team leaders
- Local, state, and federal leaders and program managers
- Facilitators, trainers and consultants

Course Length: One day

Prerequisite: None

ToP® Consensus Workshop

Description: The ToP® Consensus Workshop Method leads to consensus-based group decisions that respect diverse perspectives, create joint resolve and inspire individual and group action. All ideas are valued and synthesized to create the consensus. Consensus is built by using a methodology to help participants see new relationships among ideas and step-by-step building of group agreement. Skilled facilitators can achieve basic consensus outcomes in as little as forty-five minutes and richly detailed products within two hours.

This structured process engages people in getting to consensus and building solutions that everyone agrees with. This method is helpful in integrating diverse ideas to build agreement on practical and creative solutions.

Participants learn the methods in an interactive demonstration and then practice using the method with their own selected topics. This tool has thousands of applications and can be used in many settings.

Outcomes:
- Build practical team consensus on any issue or topic.
- Honor all ideas so all participants are valued contributors.
- Generate creative solutions in a short amount of time.
- Infuse the team with a sense of cohesion, accomplishment and responsibility.
- Integrate thinking (rational and intuitive).

Benefits:
- Facilitates respect for group members and the wisdom each person brings.
- Enables shared power and accountability.
- Increases effective use of resources.
- Provides a structured process for progress.
- Results in a high level of engagement and commitment.

Who Should Take this Course:
- Those who wish to truly engage others in reaching shared agreement
- Business leaders
- Local, state, and federal leaders and program managers
- Strategic planners
- Managers
- Team leaders
- Facilitators, trainers and consultants

Course Length: One day

Prerequisite: ToP® Focused Conversation

ToP® Action Planning and Accelerated Action Planning

Description: This course teaches the Action Planning Process from the ToP® Facilitation Methods course. The Action Planning Process is usually led by a facilitator to plan longer and more complex projects or events. It can take a half-day to a day to develop the full action plan. An example of an appropriate use of the full Action Planning process would be planning the development and building of a new facility. This would include outreach, design, funding and construction.

If participants express the need for a small team tool, the Accelerated Action Planning Process may also be taught. The Accelerated Action Planning process can be used by a small team of non-facilitators to plan a single event or project using commercially available templates. The plan can usually be developed in just two hours. An example of an appropriate use of Accelerated Action Planning would be planning a grand opening ceremony for the new facility.

Outcomes:
- Build consensus about project implementation among various stakeholders.
- Learn two collaborative tools to develop action plans.
- Organize task teams, assignments, and an implementation timeline for meeting project deliverables and coordinating progress.

Benefits:
- Generates commitment from the whole team.
- Builds shared understanding and commitment.
- Energizes team for implementation.

Who Should Take this Course:
- Those who need to lead both small and large groups to create effective organization plans for discrete, short-term projects and longer-term more complex initiatives or change efforts
- Team leaders
- Managers
- Local, state, and federal leaders and program managers
- Facilitators and consultants

Course Length: One Day

Prerequisite: None

ToP® Accelerated Action Planning

Description: This training provides the process, templates, and tools to quickly organize a group or small team to develop a workable plan to accomplish a specific objective that has been already been approved in concept. Participants learn to energize and align a team toward a common goal in the time it takes to have a regular staff meeting. Includes all the practical details to ensure a successful project.

This process is especially useful for small teams of 4 – 10 members who are planning a project within the next few days, weeks, or months. The process is perfect for planning either a project or an event. Projects should be tangible and specific. This might include an event, a work project, formation of a team, writing a report or developing a grant proposal.

Most useful for projects that are:
- **DOABLE** – Tangible project or event. Possible to do given timeframe and resources.
- **DISCRETE** – Separate and distinct**.** Can be considered individually.
- **DEFINED** – There's a general understanding of what needs to be done and the desired results.
- **DECIDED** – There's already consensus that this project or event should happen.

Outcomes:
- Learn an accelerated eight-step, action planning process.
- Receive an action planning tool for a small team to quickly develop a high-level plan.
- Acquire tools to lead a fast and engaging planning session.

Benefits:
- Produces a comprehensive high-level action plan in just two hours.
- Creates a highly motivated team willing to take action.
- Gets a team on board quickly to develop a plan to address an emergency or priority need.
- Motivates the team to embrace the plan.
- Enhances confidence in quickly attaining a successful plan.

Who Should Take this Course:
- Those who need to work with or lead small groups to create effective organization plans
- Community leaders
- Team leaders
- Managers
- Local, state, and federal leaders and program managers
- Facilitators and consultants

Course Length: Half Day

Prerequisite: None

Virtual ToP® Application Design

Description: This virtual course focuses on deepening understanding of ToP® methodologies, creating effective meeting designs and engaging communities. A critical issue with most trainings is that participants are generally very enthusiastic and make many plans to implement the training. However, returning to their everyday work lives can drain the energy from their plans. This model addresses the issue for ToP® training participants by providing six months of follow-up during which the participants plan and facilitate actual events. In addition, each session is chock full of new tools they can apply.

The cohorts meet six months, once per month for two hours. These virtual sessions are supported by a technical Adobe Connect facilitator to set-up and chauffeur the meeting. There is one or more Licensed ToP® trainers to facilitate the session and provide mentoring support.

Session 1   **Defining what to accomplish:** Scope the facilitation project, set clear rational and experiential aims and design a participatory meeting.

Session 2   **Preparing to facilitate:** Learn from reflection, determine which methods will accomplish the group's priorities best and create and customize the facilitation plan.

Session 3   **Engaging the group:** Use the Focused Conversation to facilitate shared awareness and as a framework for the event.

Session 4   **Reaching group agreement:** Facilitate agreement by using the Consensus Workshop and combine the Focused Conversation with other meeting processes.

Session 5   **Setting priorities:** To help the group establish priorities without creating winners and losers, learn five priority setting tools.

Session 6   **Gaining motivation and commitment:** Create plans collaboratively, apply Action Planning components creatively, motivate action and foster accountability.

Outcomes:
- Receive virtual mentoring in ToP® methodology to support applications.
- Provide a positive, cooperative forum for sharing best practices, success stories, challenges and ideas.
- Develop a sense of teamwork and comradery in learning and applying ToP® skills.

Benefits:
- Improved ability to apply ToP® methodologies to facilitation situations and challenging meetings.
- Increased confidence as a facilitator with personal mentoring.
- Embed effective tools and techniques into every meeting.

Who Should Take this Course:
- Graduates of ToP® Facilitation Methods courses
- Those who want to improve their ability to apply ToP® methodologies
- Those who want to learn new tools and techniques to lead effective meetings

Course Length: One two-hour virtual meeting once a month for six months

Prerequisite: ToP® Facilitation Methods or ToP® Facilitation Methods: Leadership Edition. You must have a computer with Internet access and a headset.

Section Three

Building on the
Core Methodologies

ToP® Strategic Planning

Description: Teaches how to facilitate participatory strategic planning resulting in group consensus and plans that are actually implemented. This methodology is especially useful with larger groups of stakeholders and groups holding diverse ideas. Strategic plans using this powerful process can be accomplished in as little as two days. Weaves the powerful ToP® Facilitation Methods into an integrated approach to strategic planning. The resulting plans are realistic, achievable and easy to monitor.

Provides step-by-step instructions for the five phases of developing a strategic plan:
1. Preparation and Design
2. Practical Vision
3. Underlying Contradictions
4. Strategic Directions
5. Focused Implementation

Outcomes:
- Identify well-focused actions that lead to big breakthroughs.
- Weave together the basic tools to address complex meeting requirements.
- Lead a structured planning process that results in concrete accomplishments.
- Experience, practice and learn to facilitate the complete strategic planning process.

Benefits:
- Aligns members around common goals and long-term strategies.
- Enables a group to commit to a common vision and own the resulting plan.
- Motivates groups and organizations to take focused action.
- Generates high levels of participation and commitment.

Who Should Take this Course:
- Those needing to collaborate with large numbers of stakeholders to develop long-term strategy quickly
- Executives, managers and organizational leaders who depend on others for successful implementation of organization strategies
- Board members, educators and individuals responsible for leading organizations into the future
- Facilitators and strategic planning consultants
- Local, state, and federal leaders and program managers

Course Length: Two days

Prerequisite: ToP® Facilitation Methods

ToP® Secrets of Implementation

Description: Sustaining a plan, once it has been implemented, can be challenging. Staying on track is difficult, especially when new people are introduced after the plan is developed. This course anticipates the fact that all plans will need adjustments as they are implemented and provides a road map to do so. The course is designed to help keep plans and projects alive, relevant, doable and achievable. Participants are asked to bring real-life implementation problems to class to experience peer mentoring.

Covers the four stages of plan implementation, with facilitation, collaborative tools and methods to utilize at each level.
1. Getting started
2. Building and sustaining momentum
3. Adjusting and remaneuvering
4. Bringing closure

Outcomes:
- Understand and deal with the challenges of implementing large-scale strategic plans.
- Sustain momentum to bring the plans to implementation.
- Review strategic plan progress and plan for upcoming initiatives.
- Bring closure to plans and celebrate the team's work.
- Learn to integrate new leadership, partners and collaboration from multiple sectors.
- Learn to assess change motivation and ability factors so that initiatives are successful.
- Receive personal consulting advice on implementation challenges brought to the course.
- Learn 40 keys to implementation success.

Benefits:
- Leads groups so that they are enthusiastic from the start and throughout implementation.
- Ensures the hard work of planning is realized with concrete accomplishments.
- Models implementation of dynamic plans.
- Provides facilitation tools to assess change and to develop solutions, as part of regular review to remaneuver in a crisis.

Who Should Take this Course:
- Those charged with implementing plans and strategies
- Strategic plan implementation teams
- Organization and community change agents
- Local, state, and federal leaders and program managers
- Community workers, planners, project managers
- Consultants and facilitators

Course Length: Two days

Prerequisite: None (ToP® Facilitation Methods and ToP® Strategic Planning are very helpful but not required)

ToP® Approaches to Environmental Scanning

Description: Before preparing an organization's plans, the team needs to understand the history and current dilemmas, as well as anticipate industry trends. Environmental scanning provides a way to quickly tap into relevant factual data and customer, staff or community perceptions.

This course specializes in getting groups on the same page to begin their strategic work. Teaches ten different ways to perform an assessment with a group, including hands-on practice and matching the right approach to the situation.

The ten methods include:
- Brief Trends Conversation
- Extended Current Situation/Trends Conversation
- Quick Situation Assessment 1
- Quick Situation Assessment 2
- Cooperative Study of Complex Data
- The Wave Metaphor (4 levels)
- Extended Wave Metaphor (5 levels)
- Strategic Juncture Analysis
- Wall of Wonder
- Social and Corporate Process Triangles

Outcomes:
- Establish foundation of knowledge about the external trends to consider when preparing plans and strategies.
- Document organizational history and current situation as a foundation for future strategy building.
- Quickly and easily study industry materials and reports.
- Gather participant information for important planning decisions.
- Integrate group knowledge and diverse points of view and perspectives.
- Facilitate engaging and highly participatory processes to create common understanding.

Benefits:
- Integrates thinking from subject matter experts and key informants.
- Anticipates future business trends and alternative scenarios.
- Saves time in reviewing and interpreting large amounts of information.

Who Should Take this Course:
- Those who want to set a foundation for strategic thinking and proactive planning
- Business leaders
- Local, state, and federal leaders and program managers
- Strategic planners
- Team leaders
- Facilitators and consultants

Course Length: One day

Prerequisite: ToP® Facilitation Methods   **Recommended:** ToP® Strategic Planning

Designing for Change

Description: Strong images influence why people act the way they do. Individuals, groups, and organizations sometimes need to rethink their image of themselves and adjust to changing realities. The ability to transform is influenced by whether they can shift images. This course provides leadership tools to create the environments, contexts and processes that help people positively embrace new circumstances and choose creativity, cooperation and productivity.

The Designing for Change course unlocks the power of shaping and shifting images and provides tools to design facilitated sessions that result in effective and lasting change. It equips the participants to lead complex transformational change.

The major modules of the course include:
1. Foundations and principles of image theory
2. The dynamics of image stability and change
3. How to facilitate image shaping and image shifting
4. How to generate critical messages
5. How graphics generate and hold images
6. An inclusive design tool for sessions and events
7. How to plan interactive decision making

Outcomes:
- Learn how to lead transformational change.
- Understand how mental models shape our behavior, how messages shape these images, and how to shift these images to move ourselves and the organizations we lead beyond habitual patterns and practices.
- Learn how image shift relates to brain functioning.
- Receive powerful tools to better assess what is holding detrimental patterns in place and how to move toward the desired goals and eliminate harmful behaviors.
- Acquire ways to strategize and stimulate creative image shift through the design of interactive sessions with groups and organizations.
- Practice using the comprehensive and powerful Kaleidoscope Design tool.
- Leave with stories, examples and templates for facilitations and trainings.

Benefits:
- Lead transformational change at personal, organizational and community levels.
- Design more effective conferences, planning sessions and meetings.
- Enhance capacity and confidence in using Image Theory tools in training and design.
- Use these transformative tools to lead significant change.

Who Should Take this Course:
- Those involved in leading change and organization transformation
- Those facilitating organization and community improvement processes
- Educators and community organizers
- Local, state and federal leaders
- Facilitators and process consultants

Course Length: Two days

Prerequisite: ToP® Facilitation Methods

Mastering the Technology of Participation (MToP)

Description: MToP is an intensive year-long training program in core ToP® methods for those wishing to significantly increase their skills in group facilitation. MToP deepens and increases the ease and enjoyment of using ToP® methods.

MToP explores a variety of ways to apply each of the core ToP® methods. The program provides both a theoretical foundation and multiple opportunities for practice and feedback. There are assignments, opportunities to facilitate, mentoring support and conference calls between each quarterly intensive.

MToP creates a supportive learning community of like-minded people who want to master facilitation to make a difference in the world. Participants develop a network of colleagues that have deep and meaningful connections with each other. While intense learning occurs, there are many opportunities for celebration.

The MToP faculty members are mentor trainers with extensive experience successfully using these methods in diverse organizations and communities.

Outcomes:
- Deepen understanding of the core ToP® methodologies.
- Discover the rich and engaging theory underpinning the ToP® methods.
- Learn new applications and numerous facilitation tools.
- Create a safe and supportive learning environment.
- Receive opportunities for practice and feedback.

Benefits:
- Significantly increases professional facilitation skills.
- Builds capacity and confidence as a facilitator through extensive practice opportunities, coaching and peer mentoring.
- Provides a path to facilitator certification and the trainers journey.
- Develops a powerful learning community that will continue beyond MToP.

Who Should Take this Course:
- Facilitators who want to master their knowledge of ToP® facilitation methods
- Those wanting to increase their competence and confidence in using ToP® methods
- Organizational leaders
- Organization development consultants
- Consultants and facilitators who want to prepare to become Certified ToP® Facilitators or Licensed Trainers of ToP® methods

Course Length: Year-long; three days each quarter. Twelve training days total plus monthly mentoring support

Prerequisites: ToP® Facilitation Methods and ToP® Strategic Planning

Section Three

Building on the Core Methodologies

Facilitation Graphics

Description: Words communicate symbolically. Words married to visuals communicate more deeply and dramatically. There is power in the visual. It shapes experience, refreshes, enlivens and deepens communication. Nearly 90% of adults learn best tapping into visual thinking and learning skills.

This fun and interesting course offers the tools to add visual interest to all work but especially for facilitators and trainers. This one-day course covers:
- Organizing information visually
- Learning shapes and drawing techniques
- Beginning an icon library
- Exploring a variety of markers, tools, papers and documentation processes
- Learning in-session graphic recording; tips and practice
- Creating metaphorical Graphic Facilitation templates to use while leading the group process

Outcomes:
- Create and use graphics for meetings, training courses and conferences.
- Obtain multiple ideas and strategies for working visually and interactively.
- Practice drawing icons, process charts and in-session graphic recording.
- Walk away with designs for real meetings and group sessions.
- Receive peer coaching and networking.

Benefits:
- Build confidence in the ability to create helpful visual illustrations.
- Augment meeting design to engage participants visually.
- Expand the facilitator toolkit for communicating ideas and strategies.
- Deepen capability to listen fully and capture key ideas visually.
- Improve participants' abilities to participate and engage.
- Increase confidence for leading groups using visual tools that help them think, discuss and make decisions.

Who Should Take this Course:
- Those who want to communicate and document information and ideas more powerfully
- Graphic recorders, facilitators and session notetakers
- People who think they can't draw or illustrate concepts
- People who can draw and want to marry graphic illustration with group dynamics
- Anyone communicating to or leading groups
- Course instructors, teachers and trainers
- Communications professionals

Course Length: One day

Prerequisite: None

ToP® Facilitation for Innovation: Inspiring Group Creativity

Description: Teaches ways to foster group innovation using facilitation tools and approaches that spark creativity. Facilitating group creativity for innovative action has always been a challenge, perhaps never more so than when a group is tasked to "think outside the box" on the spot and come up with new solutions to a problem or situation.

This highly interactive course utilizes creative tools to explore and practice group innovation. Participants learn methods that can be immediately applied to foster creative teamwork.

Outcomes:
- Facilitate process to heighten and enhance a group's creativity.
- Frame and reframe problems and dilemmas.
- Resolve issues and problems creatively.
- Develop innovative strategies.
- Expand toolkit with methods to enhance creativity methods with groups.

Benefits:
- Harnesses the power of creative collaboration to improve organization effectiveness.
- Exercises the creativity of the group members to develop innovative solutions.
- Helps the group view problems through a new creative lens.
- Builds confidence in applying multiple practical techniques and strategies for facilitating innovation.

Who Should Take this Course:
- Those who wish to develop the creative capacities of teams and groups
- Organizational change agents
- Project managers
- Team leaders
- Group facilitators
- Local, state, and federal leaders and program managers

Course Length: One Day

Prerequisite: None

Participatory Project Management Part One: Project Design

Description: Teaches a two-phase approach to design a project with 8 – 30 planning participants. Project Design integrates the team's thinking into a consensus project framework, so everyone is clear on the scope and level of effort needed.

Project Planning develops the plan for a project or prototype that is launched in a coordinated and efficient manner. Students use the project development framework to create a project plan using a relevant or real project. Teaches how to harness participation to produce outstanding results.

Part One: Project Design is devoted to teaching the ToP® Project Design methodology, clarifying project expectations, creating a vision and success indicators, and developing a realistic scope of work.

Outcomes:
- Fully developed design for a project.
- Valuable planning process that can be applied to many other projects.
- Full buy-in from the planning team about how to approach major projects.

Benefits:
- Frames the project expectations and scope in a concise manner.
- Creates a project vision and success indicators while honoring all ideas.
- Assesses the strengths and weaknesses of the team to accomplish the project.
- Evaluates the benefits and dangers of project success.
- Develops a realistic scope of work.

Who Should Take this Course:
- Those who need to align teams to create an inspiring and doable project scope of work
- Business leaders
- Local, state, and federal leaders and program managers
- Managers
- Team leaders
- Team members
- Facilitators and consultants

Course Length: Half-day

Prerequisite: None

Participatory Project Management Part Two:
Project Planning

Description: Teaches a two-phase approach to design a project with 8 – 30 planning participants. Project Design integrates the team's thinking into a consensus project framework, so everyone is clear on the scope and level of effort needed.

Project Planning develops the plan for a project or prototype that is launched in a coordinated and efficient manner. Students use the project development framework to create a project plan using a relevant or real project. Teaches how to harness participation to produce outstanding results.

Part Two: Project Planning is devoted to teaching the ToP® Project Planning methodology, brainstorming and organizing key actions, creating motivated project teams, designating timelines and developing a calendar of events, coordinating the work of the teams, communicating with stakeholders and marketing the project.

Outcomes:
- Fully developed design for a project.
- Valuable planning process that can be applied to many other projects.
- Full buy-in from the planning team about how to approach major projects.

Benefits:
- Generates a large number of practical, creative and relevant actions to complete the project.
- Creates project teams or committees that are motivated to carry out their roles.
- Develops a project timeline and calendar with full group consensus.
- Coordinates actions of various teams to avoid duplication of effort and rework.
- Markets the project with guiding images to motivate participation.

Who Should Take this Course:
- Those who need to organize large groups for project implementation
- Business leaders
- Local, state, and federal leaders and program managers
- Managers
- Team leaders
- Team members
- Facilitators and consultants

Course Length: Half-day

Prerequisite: None

ToP® Social Process Triangles

Description: Provides a comprehensive tool to analyze social dynamics across history, cultures, organizations, communities and countries. The Social Process Triangles are the distillation of global research on social dynamics. This tool provides a means to appraise the climate for business and capacity of organizations or countries to respond to changing times. The Social Process Triangles provide an assessment of social situations and the complex factors behind them to create strategies to address social issues in communities and organizations. This tool works especially well for large, complex organizations to determine the leverage points for change.

Outcomes:
- Learn an effective tool to assess whole systems and large complex systems such as agencies and countries.
- Assess complex factors impacting organization performance.
- Quickly surface new understandings about a social issue or organization.
- Practice with a team to gather various perspectives and create working conclusions.

Benefits:
- Clarifies trends relevant to a specific geographic area (city, county, state, nation).
- Engages broad input on objective data for strategy development.
- Assesses social dynamics of small and large systems and organizations.
- Identifies factors contributing to growth and collapse of societal systems, such as institutions, cultural norms and resource structures.

Who Should Take this Course:
- Those wishing to diagnose societal trends to create organization, societal or cultural change
- Policy and business leaders
- Systems Change Consultants
- Facilitators
- Local, state, and federal leaders and program managers
- Economists, social scientists and community planners

Course Length: One day

Prerequisite: None

Virtual Facilitation Online

Description: This course teaches how to keep virtual participants engaged. Learn to facilitate effective virtual meetings, in which participants exchange ideas, manage projects, and solve problems over the Internet with specialty meeting software. The course focuses on using ToP® methods virtually using Adobe Connect meeting software.

Experience an online learning lab for making meetings and events collaborative, participatory and engaging.

Outcomes:
- Learn and practice how to produce a virtual meeting.
- Understand and practice a team approach to conducting virtual meetings and training.
- Learn to conduct virtual meetings with Adobe Connect.
- Use virtual applications of the ToP® Focused Conversation method.
- Practice meeting skills and receive feedback in a comfortable, safe space.

Benefits:
- Receive a free temporary Adobe Connect license and discounts on full purchases.
- Effectively collaborate with multiple people over large geographic distances.
- Produce engaging virtual meetings that are participatory and elicit innovative thinking and creative problem solving.
- Increased productivity and reduced travel costs.
- Increased confidence as a virtual facilitator.

Who Should Take this Course:
- Those who need to collaborate over geographic distances
- Those who want to facilitate virtual meetings, training sessions or webinars
- Those who want to increase participation in conference calls
- Those who want to deepen knowledge of ToP® methods and virtual meeting platforms
- Business, government and nonprofit team leaders
- Those with limited mileage and travel budgets

Course Length: Eight virtual sessions, 90 minutes – two hours each, plus homework

Prerequisite: None. Headset with microphone required for each participant

Facilitating Conciliation: Beyond Conflict Resolution

Description: Our society is crying out for alternatives to the adversarial approach to dealing with disputes. The possibility of conciliation exists in every situation. The people involved can make wise, responsible choices and can work together to develop solutions for common problems. This course is designed to equip the facilitator with the perspective and tools to bring a group through conflict to a place of peace. The course uses ToP® methods to reconcile differences.

The Phases of Conciliation are:
1. Initiating the Dialogue
2. Clarifying the Situation
3. Expressing the Experience
4. Articulating the Substantial Issues
5. Generating Options
6. Creating Resolution
7. Planning for Implementation

The course addresses these phases in the four main modules:
1. The Nature of Conflict
2. The Phases of Conciliation
3. Tools for Conciliation
4. Designing Conciliation Processes

Outcomes:
- Learn what fuels and sustains conflict.
- Hear many real-life examples of conciliation.
- Improved understanding of how to use ToP® techniques to address each phase of conciliation.

Benefits:
- Increased understanding about the ways conciliation occurs.
- The principles and practices of conciliation are applied to real-life conflicts.
- Enhanced confidence in facilitative leadership.

Who Should Take this Course:
- Experienced ToP® facilitators
- Those who want to lessen conflict and increase peace in our world
- Local, state and federal program managers
- Active citizens and community workers
- Organization development consultants
- Community agencies
- Community planners

Course Length: 2 days

Prerequisite: ToP® Facilitation Methods

Community Development Intensive (CDI)

Description: When people work together collaboratively to meet their changing social and economic needs, community development is successful and sustainable. This approach results in long-term, locally motivated change as people are empowered to take charge of their own development. These grassroots methods have been used worldwide for over forty years to launch and sustain thousands of community-based initiatives.

This five-day course focuses on community development as whole systems change. It is a practical, how-to lab on tools and methods for empowering communities and groups**.** The highly participatory course includes theory, demonstration of methods, practice, examples and case studies.

The major modules include:
1. Approaches to Community Development
2. Participatory Community Analysis and Asset Mapping
3. Participatory Planning
4. Community Organization and Project Coordination
5. Participatory Implementation
6. Participatory Evaluation and Methods to Sustain and Expand the Project

Outcomes:
- Learn the social, economic, and cultural principles of whole system community development.
- Ensure grassroots participation.
- Build supportive relationships.
- Convert plans into visible, practical projects.

Benefits:
- Increase community participation and involvement.
- Facilitate economic self-sufficiency and shared leadership.
- Build a sense of ownership and responsibility in the community.
- Keep projects moving so people don't falter after a good beginning.
- Build progress and accountability.

Who Should Take this Course:
- Community leaders and elected officials/representatives
- Community agencies
- Community planners**,** economic advisers and community relations officers
- Informal community leaders and volunteers who work with many community initiatives
- Facilitators and systems change consultants
- Local, state, and federal leaders
- Those who need to understand how to interact with and support communities

Course Length: Five days

Prerequisite: None