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PAST PERFORMANCE

Leadership and Coaching

Executive Leadership Team for the City of Bloomington, Minnesota

Approach

- Facilitate Executive Leadership Team weekly meetings
- Focus on team development and effective meeting outcomes
- Strategic planning actions to implement within the scope of the City's vision, mission, and values of a high performing organization

Results

- Gained clarity and focus as demonstrated by an approved vision and values statement
- Created a list and gained alignment of Citywide priorities
- Faster, more effective decision-making process through utilizing a consensus workshop methodology
- Streamlined the leadership to support and achieve performance goals

Royal Dutch Shell

Need: Seeing a need to empower and train Shell individual performers to coach their peers and team members to "unlock potential and maximize performance," Shell launched a global effort to equip these employees in effective peer coaching

Approach

- Trainers conducted two-day peer coaching skills trainings with multiple groups of engineers and project managers in Malaysia, Brunei, and the US gulf states
- Course leveraged participants' personal values and beliefs in supporting others to achieve continuous improvement
- Participants followed a three-phase roadmap for increasing awareness, practicing coaching skills and applying these skills on the job
- Shell supervisors followed up with participants to ensure effective implementation

Results

- Participants left with individual strategies and action plans to coach colleagues
- The course provided them with life skills to use with family and community

Fairfax Virginia Court Appointed Special Advocates Executive Coaching

Approach

- Provide executive coaching to incoming "first-time" executive director
- Focus on efficient prioritization and management of fundraising programs
- Focus on smart organization and management of limited staffing
- Focus on relationship strategy and case statement for outreach to major gift funders

Results

- In executive director's second year, the organization managed a 32% increase in court referrals and 35% increase in number of cases while beating revenue goals and reducing expenses by 3%
- The following year the organization lowered expenditures in fundraising, management and general expenses by 4%. Closed cases were significantly increased by 52% and the organization met their budget for the third year in a row

Colorado Family Leadership Training Institute

(Colorado State University Extension)

Need: To bring 10 Host Agencies from around the state to learn best implementation practices from one another and build camaraderie among teams

Approach

- Facilitated all day retreat that drew from partners' experiences and accomplishments for successful implementations
- Methods used included Wall of Wonder, Cooperative Study of Data and a Trend Analysis

Results

- Host Agency teams had doable and actionable tasks to accomplish with their local teams
- Recruitment for the 20-week course was at capacity and complete local funding was obtained
- An additional 5 Host Agencies agreed to implement the following year

Genentech

Need: Facilitative leadership skills needed to streamline risk assessment process and increase quality in manufacturing and distribution functions

Approach

- Designed and delivered three customized facilitation courses for leaders
- Coached leaders in facilitating discussions on mission critical topics
- Designed and facilitated leadership conference for 180 participants
- Trained facilitators for nine breakout groups

Results

- Genentech leaders are enthusiastic about the improved meeting results from using the methodologies learned in the courses and demonstrated at the leadership conference



What's Next: Leading a Thriving Transition Organization Leadership Transition

Need: Long-term and founding executive directors are hungry for strategies and best practices to help them retire with grace and leave their organizations in a healthy state

Approach

- Facilitate a four-day retreat for retiring nonprofit long-time leaders
- Guide the participants through intensive peer discussion and learning on leaving the organization in a healthy state for the next leader as well as getting personally ready for a change in identity, responsibility and purpose

Results

- Over 125 dedicated leaders prepared to exit their work legacy with preparedness, courage and grace
- Wisdom on what it takes to leave an organization well
- Impacted the next generation of leadership with best practices in recruiting for diversity
- Questioned and addressed the relevancy of how nonprofits are structured

California State Department of Housing and Community Development Leadership Performance Standards & Coaching

Need: Bring leaders on board quickly in largest division where over 70% of the managers were either new to leadership or new to the agency

Approach

- Developed leadership performance indicators through a participatory process
- Facilitated leadership chartering session with three levels of leadership
- Coached leaders in one-to-one sessions
- Coached and trained leaders in a group setting on communication strategies

Results

- Leadership standards are in place for development and performance measurement
- Agreement on leadership mission, vision and key strategies
- Skill improvement by most leaders as assessed by performance questionnaires

California Secretary of State Executive Team Coaching

Need: To proactively address rising employee complaints and grievances in a critical Division

Approach

- Coached Executive Leadership team in addressing internal issues
- Assessed organization performance through interviews and identified key issues

- Facilitated the Executive Team and developed plan to proactively address issues
- Worked with Executives to implement strategies
- Offered training in key leadership skills

Results

- A positive atmosphere has been sustained in the Division for over five years
- Employee complaints and grievances are no longer present



California SNAP-Ed Partnership Virtual Coaching

Need: A statewide partnership consisting of the California Department of Public Health, California Department of Social Services, California Department of Aging, Catholic Social Services and University of California CalFresh needed to provide coaching to Local Implementing Agencies in facilitated leadership skills to lead multi-stakeholder collaboratives in increasing health in communities and schools

Approach

- Developed a virtual coaching program where community leadership from various parts of the state could log into Adobe Connect and participate
- Coached on meeting design, facilitative leadership and community collaboration tools
- Provided individual coaching on specific session designs

Results

- Successfully conducted three 6-month (2 hours per month) sessions in 2017
- Participants significantly increased their ability to design and facilitate community meetings
- Other virtual coaching sessions are contracted for 2018

Hennepin County Department of Corrections and Rehabilitation Executive Leadership Team

Need: Create a shared vision for correctional out-of-home placement for juveniles

Approach

Used a combination of LEGO® SERIOUS PLAY® methodology and ToP Focused Conversation to visually display and articulate the core issues with the current out-of-home placement practices to create a unified vision for the future

Result

- Created a shared out-of-home placement vision for the department that included a full spectrum of placement types from non-secure to secure
- Created a vision that could be shared and articulated to the department
- Enhanced innovative thinking that created a space for creative options to be shared
- The spectrum of options created opportunities to strengthen community involvement and ownership



The Coaching Experience

Need: A large state agency required a program to provide tools for their leaders transition from the traditional role of manager to that of transformational leader and coach

Approach

- Developed and administered a 360-degree assessment on 5 key leadership dimensions
- Used data to assist each leader in developing an individual coaching development plan
- Facilitated 5-day coaching skill development course to provide development experience to meet each leader's specific needs and goals
- Assisted leaders in developing real life applications and a re-entry strategy

Result

- Increased coaching leadership skills in leading, partnering, mentoring, improving and recognizing
- Shared and applied leadership model and terms across the agency
- Standardized measurable leadership behavioral assessment to track progress on 50 leadership success indicators

