



## GENERAL SERVICE ADMINISTRATION

### Federal Supply Service

#### *Authorized Federal Multiple Awards Schedule Price List*

## 47QRAA18D002T

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic deliver order is available through GSA Advantage!<sup>™</sup>, a menu-driven database system. The INTERNET address for GSA Advantage!<sup>™</sup> is <http://www.GSAAdvantage.gov>.

#### Schedule for - Multiple Award Schedule

**Federal Supply Group:** Federal Supply Group: Professional Services **Class:**

**Contract Number:** 47QRAA18D002T

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at <http://www.gsa.gov/schedules-ordering>

**Contract Period:** December 24, 2017 – December 23, 2022

**Contractor:** HEIDI KOLBE & COMPANY  
827 Brass Court  
West Sacramento, CA 95691 2846

**DBA:** The Kolbe Company

**Business Size:** Small, Woman Owned Business

In accordance with 13 C.F.R. 121.404, the Contractor is ineligible to participate in any RFQ that is set aside for small business where the subject contract's awarded size status for the preponderance NAICS designated in the RFQ is "other than small".

**Telephone:** 916-481-4488  
**FAX Number:** 1-833-790-3088  
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#### Offering Services In:

541611 Facilitation and Management Consulting  
611430 Professional Development Training Courses

## CUSTOMER INFORMATION:

### 1a. Table of Awarded Categories:

Category	Category Description
541611	Professional Services - Business Administrative Services - Management Consulting
611430	Professional Services -Training: Instructor Led Training, Web Based Training and Education Courses, Course Development
611512	Aviation and Flight Training
OLM	Order Level Materials

- 1b.** Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.
- 1c.** If the Contractor is proposing hourly rates a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate "Not applicable" for this item.
- 2. Maximum Order:** \$1,000,000.00
- 3. Minimum Order:** \$100.00
- 4. Geographic Coverage (delivery Area):** Domestic Only
- 5. Point(s) of production (city, county, and state or foreign country):** Same as company address
- 6. Discount from list prices or statement of net price:** Government net prices (discounts already deducted). See Attachment.
- 7. Quantity discounts:** None Offered
- 8. Prompt payment terms:** Net 30 days, information for ordering offices: prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.
- 9a. Notification that Government purchase cards are accepted up to the micro-purchase threshold:** Yes
- 9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold:** will accept .
- 10. Foreign items (list items by country of origin):** None
- 11a. Time of Delivery (Contractor insert number of days):** Specified on the Task Order
- 11b. Expedited Delivery.** The Contractor will insert the sentence "Items available for expedited delivery are noted in this price list." under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery: Contact Contractor
- 11c. Overnight and 2-day delivery.** The Contractor will indicate whether overnight and 2-day delivery are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery: Contact Contractor
- 11d. Urgent Requirements.** The Contractor will note in its price list the "Urgent Requirements" clause of its contract and advise agencies that they can also contact the Contractor's representative to effect a faster delivery: Contact Contractor

- 12. **F.O.B Points(s):** Destination
- 13a. **Ordering Address(es):** Same as Contractor
- 13b. **Ordering procedures:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's), and are found in Federal Acquisition Regulation (FAR) 8.405-3
- 14. **Payment address(es):** Same as company address
- 15. **Warranty provision.:** Contractor's standard commercial warranty.
- 16. **Export Packing Charges (if applicable):** N/A
- 17. **Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level):** Contact Contractor
- 18. **Terms and conditions of rental, maintenance, and repair (if applicable):** N/A
- 19. **Terms and conditions of installation (if applicable):** N/A
- 20. **Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable):** N/A
- 20a. **Terms and conditions for any other services (if applicable):** N/A
- 21. **List of service and distribution points (if applicable):** N/A
- 22. **List of participating dealers (if applicable):** N/A
- 23. **Preventive maintenance (if applicable):** N/A
- 24a. **Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants:** N/A
- 24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor's website or other location.) The EIT standards can be found at: [www.Section508.gov/](http://www.Section508.gov/).
- 25. **Data Universal Numbering System (DUNS) number:** 021183237
- 26. **Notification regarding registration in System for Award Management (SAM) database:** Registered
- 27. **Final Pricing:**  
The rates shown below include the Industrial Funding Fee (IFF) of 0.75%.

## Integrated Consulting Pricing

### Labor Categories Pricing

Item	Category	Awarded Labor Category	Site	GSA Awarded Prices
1	541611	Project Director – Principal Facilitator	Customer	\$259.35
2	541611	Project Manager II – Facilitator **	Customer	\$209.47
3	541611	Business Analyst – Notetaker	Customer	\$174.56

\*\* SCA covered labor category

## Training Courses Pricing: Category 611430

Course/Training Name	Course Length	Minimum Participants	Maximum Participants	Location	GSA Awarded Prices
ToP Facilitation Methods: Leadership Edition (Public Training)	3 days	1	1	Contractor	\$950.00
ToP Facilitation Methods: Leadership Edition (In-House, 4-10 participants)	3 days	4	10	Customer	\$9,476.07
ToP Facilitation Methods: Leadership Edition (In-House, 2nd 10 participants)	3 days	1	10	Customer	\$8,907.51
ToP Facilitation Methods: Leadership Edition (In-House, 3rd 10 participants)	3 days	1	10	Customer	\$8,338.94
ToP Accelerated Action Planning (Public Training)	1/2 Day	1	1	Contractor	\$300.00
ToP Accelerated Action Planning (In-House, 4-10 participants)	1/2 Day	4	10	Customer	\$2,992.44
ToP Accelerated Action Planning (In-House, 2nd 10 participants)	1/2 Day	1	10	Customer	\$2,812.90
ToP Accelerated Action Planning (In-House, 3rd 10 participants)	1/2 Day	1	10	Customer	\$2,633.35
ToP Action Planning and Accelerated Action Planning (public course)	1 day	1	1	Contractor	\$500.00
ToP Action Planning and Accelerated Action Planning (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Action Planning and Accelerated Action Planning (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16
ToP Action Planning and Accelerated Action Planning (In-House, 3rd 10 participants)	1 day	1	10	Customer	\$4,388.92
ToP Facilitation for Innovation: Inspiring Group Creativity (public course)	1 day	1	1	Contractor	\$500.00
ToP Facilitation for Innovation: Inspiring Group Creativity (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Facilitation for Innovation: Inspiring Group Creativity (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16
ToP Focused Conversation (public course)	1 day	1	1	Contractor	\$500.00
ToP Focused Conversation (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Focused Conversation (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16
ToP Focused Conversation (In-House, 3rd 10 participants)	1 day	1	10	Customer	\$4,388.92
ToP Focused Conversation Method: Brain Based Leadership (public course)	1 day	1	1	Contractor	\$500.00
ToP Focused Conversation Method: Brain Based Leadership (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Focused Conversation Method: Brain Based Leadership (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16

ToP Focused Conversation Method: Brain Based Leadership (In-House, 3rd 10 participants)	1 day	1	10	Customer	\$4,388.92
ToP Consensus Workshop (public course)	1 day	1	1	Contractor	\$500.00
ToP Consensus Workshop (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Consensus Workshop (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16
ToP Consensus Workshop (In-House, 3rd 10 participants)	1 day	1	10	Customer	\$4,388.92
ToP Strategic Planning (public course)	2 days	1	1	Contractor	\$750.00
ToP Strategic Planning (In-House, 4-10 participants)	2 days	4	10	Customer	\$7,481.11
ToP Strategic Planning (In-House, 2nd 10 participants)	2 days	1	10	Customer	\$7,032.24
ToP Strategic Planning (In-House, 3rd 10 participants)	2 days	1	10	Customer	\$6,583.38
ToP Approaches to Environmental Scanning (public course)	1 day	1	1	Contractor	\$500.00
ToP Approaches to Environmental Scanning (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Approaches to Environmental Scanning (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16
ToP Secrets of Implementation (public course)	2 days	1	1	Contractor	\$750.00
ToP Secrets of Implementation (In-House, 4-10 participants)	2 days	4	10	Customer	\$7,481.11
ToP Secrets of Implementation (In-House, 2nd 10 participants)	2 days	1	10	Customer	\$7,032.24
ToP Secrets of Implementation (In-House, 3rd 10 participants)	2 days	1	10	Customer	\$6,583.38
ToP Social Process Triangles (public course)	1 day	1	1	Contractor	\$500.00
ToP Social Process Triangles (In-House, 4-10 participants)	1 day	4	10	Customer	\$4,987.41
ToP Social Process Triangles (In-House, 2nd 10 participants)	1 day	1	10	Customer	\$4,688.16
ToP Social Process Triangles (In-House, 3rd 10 participants)	1 day	1	10	Customer	\$4,388.92
Participatory Project Management Part 1: Project Design (In-House, 4-12 participants)	1/2 day	8	12	Customer	\$394.00
Participatory Project Management Part 2: Project Planning (In-House, 4-12 participants)	1/2 day	8	12	Customer	\$394.00

**Service Contract Act (SCA) Matrix**

SCA Eligible Labor Category	SCA Equivalent Code Title	Wage Determination No
Project Manager II - Facilitator	15050 Computer Based Training Specialist	2015-5631

The Service Contract Act (SCA) is applicable to this contract and it includes SCA applicable labor categories. The prices for the indicated (\*\*) SCA labor categories are based on the U.S. Department of Labor Wage Determination Number(s) identified in the SCA matrix. The prices awarded are in line with the geographic scope of the contract (i.e. nationwide).

## THE KOLBE COMPANY SERVICES

Government agencies are increasingly challenged to conduct open and transparent planning processes, engage diverse stakeholders and leverage resources by working collaboratively with other public and private organizations. To meet these needs, the Kolbe Company provides integrated consulting services and courses in facilitation methodologies to government agencies.

Our Integrated Consultants and Training Instructors from throughout the United States have years of experience working with public agencies and most have Master's Degrees in the sectors they specialize in. All are professionally certified facilitators and are licensed to instruct the Technology of Participation (ToP®) curriculum and other programs.

Our facilitators and consultants uphold the highest levels of quality. Their expertise is recognized and validated by the professional organizations that nationally certify facilitators using a rigorous process: International Association of Facilitators, Institute of Cultural Affairs, International Coach Federation and International Association of Public Participation.

### **541611 Management Consulting**

Since 1990, we have provided consulting services that include management consulting, strategic planning, program design and implementation, policy and regulation development, facilitation and related decision support services. We utilize a collaborative framework to foster participation. We use a wide variety of tools and processes for organizational assessment, consensus decision making, team-building and coalition development. Our meeting and conference design methodologies ensure decisions and results in less time than traditional facilitation techniques and produce tangible results, including team motivation and action.

What sets us apart from our competitors is the powerful ToP® processes which have been used successfully by federal, state and local government. The methods are especially useful in cross-agency collaborations and dealing with complex issues. Over the last 30 years, these proprietary methodologies have been carefully crafted to meet government agency needs. Some of the unique characteristics of this work are:

- By intentionally honoring the diversity of perspectives, this approach successfully integrates the contributions of all involved. ToP facilitators can bring disparate opinions to consensus quickly and respectfully.
- Since there is broad and active participation, groups can deal with far more data in less time than in traditional meetings.
- High levels of participation in the decision-making process generates commitment that increases follow-through and accountability. This approach moves people from superficial buy-in to ownership of decisions, strategies, and plans.
- The breadth and depth of involvement in these processes insures a longer-term investment in the organization and interest in learning and continuous improvement.
- These customizable methods have been used in thousands of situations with various sized groups across the globe to share information, solve problems, make decisions and plan for action.

From the beginning of every consulting project, we listen closely to client needs to clarify expectations and deliverables. We work in partnership with the client to create a set of project success indicators to measure progress and quality during the engagement. We use our varied experience to assist clients in selecting the best course of action using available resources with a focus on timeline, scope and budget.

The consultant works closely with the agency/team to accomplish the needed work, which may include:

- Meeting planning, design, and facilitation
- Outreach and public involvement
- Stakeholder collaboration
- Team-building to align staff
- Consensus building and decision making
- Mediation and conflict resolution
- Program design
- Leadership training and coaching
- Change management
- Strategic Planning
- Policy and regulation development
- Research and survey development/ analysis
- Reports and documentation
- Process improvement

## **611430 Training Courses**

We offer advanced facilitative leadership courses to support government agencies in building staff skills to engage internal and external groups to create expedited and effective results. Courses are customized to achieve the agency's goals. ToP® courses benefit anyone who leads groups and is responsible for the development and implementation of organizational strategies and plans.

We use the best practices in adult learning theory to teach facilitation methodologies. The material presented has immediate usefulness, the techniques and examples are relevant to the learners' lives, the training environment is comfortable and all feel safe to participate. The presentations are engaging and participants have ample opportunity to share their experiences, wisdom and ideas. Each training has demonstrations, opportunities for practice, regular feedback and time to plan how to apply facilitation skill to their work. Each course has a complete manual and resource materials.

Please see the Training Courses section of this document for a catalog of courses available through this schedule.

# Labor Category Descriptions

## PROJECT DIRECTOR – PRINCIPAL FACILITATOR

**Functional Description:** Serves as the senior level primary contact, consultant and facilitator for Executive Teams. Guides development of project managers, facilitators and trainers. Lead facilitated sessions that include multiple stakeholder groups, with moderate to difficult issues. Provides strategy consulting for critical policy meetings, strategic planning meetings, and large leadership conferences (greater than 200 participants). Utilizes experience in the following areas: collaboration, coalition building, public policy and regulation development, team building, professional meeting facilitation, public engagement, stakeholder outreach, organization development, leadership coaching, team leadership training, strategic planning, strategic planning implementation, accelerated action planning and conflict resolution/mediation. Approves contracts, Scopes of Work, budgets and provides general direction on multiple projects. Serves as the Mentor Lead Instructor for the Technology of Participation (ToP®) facilitation and facilitative leadership courses.

**Minimum Education and Experience:** A minimum of ten years of experience in integrated consulting, including facilitating complex initiatives within organizations and communities. Project Directors possess at least four years' experience providing consulting and facilitation services to Executive Teams. Project Directors possess at least 5 years' experience in directing large-scale, multi-sector, multi-party, multi-level, multi-agency, multi-disciplinary projects, and complex change initiatives. Project Directors – Principal Facilitators hold a Master's Degree in Organization Development or a field closely related to the functions performed. Project Directors have earned at least two professional nationally recognized facilitation certifications, are ToP® Mentor Instructors, and must be licensed by the Institute of Cultural Affairs to teach ToP® courses.

## PROJECT MANAGER II – FACILITATOR

**Functional Description:** Serves as a contact for client relations. Provides overall direction and expertise for numerous projects. Consults with the client to determine needs/priorities and define project scope and deliverables. Directs the project staff. Manages overall process within scope, timelines and budget. Leads design teams to design process for meetings. Makes decisions on process methodologies. Provides coaching and feedback as necessary to project staff. Utilizes experience in at least five of the following areas: collaboration, coalition building, public policy and regulation development, team building, professional meeting facilitation, public engagement, stakeholder outreach, organization development, leadership coaching, team leadership training, strategic planning, strategic planning implementation, accelerated action planning and conflict resolution/mediation. Serves as a ToP® Qualified Instructor Course Developer for the Technology of Participation (ToP®) facilitation and facilitative leadership courses, including Internet computer-based virtual training courses.

**Minimum Education and Experience:** A minimum of eight years of experience in integrated consulting, including facilitating complex initiatives within organizations and communities. Project Managers II – Facilitators have at four years' experience in designing and facilitating consensus agreements that are multi-sector, multiparty, multilevel, and collaborative within the context of whole change systems efforts and organization design/improvement efforts. Project Manager II - Facilitators hold a Bachelor's Degree in a field closely related to the functions performed and have earned at least one professional nationally recognized facilitation certification. ToP® Instructors must be licensed as a ToP® Qualified Instructor to teach ToP® courses. A Master's Degree may be substituted for two years of experience.

## BUSINESS ANALYST – NOTETAKER

**Functional Description:** Works independently or as a team member to provide strategy consulting services. Applies analytical approaches to address client issues related to leadership, motivation, process management, strategy and change management, and organization transformation. Conducts research, assessments, evaluations, surveys, studies, analysis for business policy and regulation development. Analyzes business processes, operations and makes recommendations for improvements. Gathers, compiles and presents data in interesting and useful ways. Conducts performance measurement and management studies. Conducts best practices assessments, organization, operation and data analysis. Provides technical expertise in conference planning, stakeholder sessions, and virtual meetings. Documents team planning sessions, implementation plans and prepare reports.

**Minimum Education and Experience:** A minimum of three years of experience in business consulting, organization development, process improvement or a related field with a Bachelor's Degree from an accredited college or university. A Master's Degree may be substituted for two years of experience. A professional certification from a nationally recognized entity in process improvement, facilitation, project management, or a related field may be substituted for one year of experience per certification.



## Technology of Participation (ToP®) Course Offerings

ToP® Facilitation Methods: Leadership Edition, page 10

ToP® Focused Conversation, page 11

ToP® Focused Conversation: Brain Based Leadership, page 12

ToP® Consensus Workshop, page 13

ToP® Action Planning and Accelerated Action Planning, page 14

ToP® Accelerated Action Planning, page 15

ToP® Strategic Planning, page 16

ToP® Secrets of Implementation, page 17

ToP® Approaches to Environmental Scanning, page 18

ToP® Facilitation for Innovation: Inspiring Group Creativity, page 19

Participatory Project Management Part One: Project Design, page 20

Participatory Project Management Part Two: Project Planning, page 21

ToP® Social Process Triangles, page 22

## 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 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® 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<sup>®</sup> Focused Conversation: Brain Based Leadership

**Description:** This course teaches the powerful Focused Conversation method 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

## 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 re-maneuvering
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 re-manuever 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, and 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

## 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 and 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 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