



and Sacramento Professional Facilitators

# Course Catalog

**Comprehensive leadership and facilitation training  
for Federal Government Agencies and Programs**

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



**Contract Holder**  
Contract GS-47QRAA18D002T

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# Section One

## Online Courses

## Accelerated Action Planning Online

In this hands-on interactive course, learn to energize and align small teams to successfully plan a project or event in a matter of hours, in an online environment. The fast and engaging 8-steps planning process ensures that all the practical details that make for a successful project are covered in a comprehensive, high level action plan produced in just two hours. This process is perfect for unexpected projects where a leader needs to quickly assemble a team to produce an action plan quickly.

AAP online provides the process, templates, and tools to quickly organize a group to develop a workable plan to accomplish a specific objective that has been already been approved in concept.

### Participants will learn to:

- Use online tools and templates to produce an action plan
- Scope a project to ensure the right team is assembled
- Lead small team action planning sessions
- Motivate a team to embrace a plan
- Produce a comprehensive high-level action plan in 2 hours
- Use the ToP AAP template tools to support continued project planning

Accelerated Action Planning is designed for leaders who lead small teams under 12 participants in planning short term projects and events.

## The Agenda

### Module 1:

- Introduction to Accelerated Action Planning
- Overview of the 8-step process
- Defining the project – Four D's
- Project scoping template
- Facilitating Core Agreements - Four Facilitation Processes

### Module 2:

- Developing the Detailed Plan – Four Facilitation Processes
- Documentation
- Templates in Ten Languages Resource
- Facilitating Team Check-in
- Review Game

### The Course Includes:

- State of the art learning platform accessible via computer
- A 12-page guide
- Two instructors
- In-process coaching
- Templates for post course online use in English and Spanish

**Course Length:** Two 2.5-hour sessions on one day (one in the morning and one in the afternoon).

**Participants:** Minimum number is 8. Maximum number is 30.

## **ToP Secrets of Implementation Online**

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 group problem solving methodology.

**Participants build skills to facilitate implementation efforts using a wide variety of tools, models, and templates by learning to:**

- Apply the 40 keys for facilitating implementation success
- Deal proactively 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
- Integrate new leadership, partners, and collaboration from multiple sectors
- Assess change motivation and ability factors so that initiatives are successful
- Lead teams so that they are enthusiastic from the start and throughout implementation
- Ensure the hard work of planning is realized with concrete accomplishments

**ToP Secrets of Implementation is designed for individuals who want to have an engaging and interactive process to implement plans and strategies in an online approach:**

- 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

## **The Agenda**

**Provides facilitation techniques, collaborative tools, and methods to utilize at each level. Each session is devoted to one of the four stages in plan implementation:**

- Day 1: Getting started
- Day 2: Building and sustaining momentum
- Day 3: Adjusting and re-maneuvering
- Day 4: Bringing closure

## **ToP Facilitation Methods Leadership Online Intensive**

Leading effective teams requires developing a culture that honors all contributions and creates a safe space for participation. This is the essence of the Technology of Participation (ToP). ToP Facilitation Methods are structured to assist groups to achieve shared awareness, shared agreement, and turn ideas into actionable plans they own. In this online course participants learn to facilitate three powerful ToP Facilitation Methods – the ToP focused conversation, the ToP consensus workshop and ToP action planning in any setting – whether face-to-face or online. The course incorporates tips, virtual tools and reference works to increase participants facilitative leadership capacity. This modularized course over three weeks includes pre-session assignments and instructor coaching to support practicing and applying methods learned between the sessions.

**Participants strengthen their leadership skills and effectiveness by learning proven facilitation methods to:**

- Achieve group participation in both virtual and face-to-face meetings
- Skillfully lead an exchange of ideas and make critical decisions together
- Design and facilitate focused conversations virtually and in person
- Develop shared agreement while honoring all ideas
- Build specific group plans and strategies that result in committed action
- Apply participatory methods in your world with practice opportunities and coaching
- Engage and inspire team members and staff in creating practical and creative solutions
- Build confidence in leading team projects and facilitating respectful conversations
- Save time and increase productivity using effective virtual collaboration tools
- Discover how to achieve consensus in a day or less while involving everyone

**This course is designed for individuals who want to deepen their capacity and confidence to use ToP Facilitation Methods in their work in an interactive online learning approach.**

- Live demonstrations by three expert ToP instructors who are also certified ToP facilitators
- Hands on facilitation practice, discussion, and coaching
- Participation in a small 5-6-person supportive learning cohort
- Individual reading, presentation, reflection, and evaluation

### **The Agenda**

Designed in 2.5-hour segments covering content, design, practice and feedback

In this 9-session course over six weeks, participants focus on one method per week:

- Week 1: ToP Focused Conversation
- Week 2: ToP Consensus Workshop
- Week 3: ToP Action Planning

Typical meeting days are Monday, Tuesday, and Friday.

**Note:** The three methods above may also be taught in individual courses and purchased as separate courses.

**Format for each week of instruction:**

**Session 1 (Monday): Understand the method.**

Prereading, method demonstration, theory discussion. Consider opportunities to apply method to real life situations.

**Session 2 (Tuesday): Design the Process.**

Using selected applications, learn design and facilitation processes in preparation for personal practice before next session. Receive written coaching feedback on design.

**Session 3 (Friday): Reflect on Process Facilitation.**

Reflect on your experience of facilitating your design, consider alternatives, learnings, areas to build upon and further applications that resonate in your world.

**The Course Includes:**

- Reading, discussing, designing, feedback and the experience of facilitating one's designs provides an intensive pathway into learning and applying ToP Facilitation Methods, whether working face to face or online
- State of the art learning platform
- Nine 2.5 hour sessions – three focused on design and practicing each ToP method
- Individual coaching on session designs, private and in writing, between sessions
- An 86-page comprehensive course manual
- Two resource books: The Art of Focused Conversation and The Workshop Book
- Small learning groups of six participants led by expert ToP instructor
- Practice in an online virtual setting
- Templates for design and reflection for all three methods
- Access to course materials for six months after course completion
- Certificate of completion
- Resources and templates to ensure your future success
- One hour of complementary facilitation coaching after the course

The more you participate, the more you get out of the course. This is an interactive, engaging course.

**You should expect to spend:**

- Nine 2.5-hour online sessions over six weeks
- 1-2 hours of reading, design, and reflection weekly
- 1-hour practice of newly acquired skills, on your own, to share with the group

**Course Length:** Nine 2.5-hour sessions over six weeks.

**Participants:** Minimum number is 10. Maximum number is 15.

## Tools and Tricks for Powerful Online Collaboration

Facilitators need to learn new, creative ways to engage participants. Many new tools and tricks have emerged recently. But tools and tricks are not enough. They are only valuable when they support the meeting purpose. We will help you identify which tools are appropriate where. You will learn what tools to use to keep participants engaged and interested.

### Participants build skills to successfully facilitate online meeting by learning to:

- Develop confidence in utilizing multiple tools simultaneously to enhance meeting goals
- Experience a variety of tools in various scenarios
- Apply the online meeting design framework for selecting appropriate tools
- Assess whether to use tools in various situations

Designed for Individuals who feel good about the basics of facilitating online meetings and are ready to add more pizzazz to their next online collaboration

### The Agenda

Offered in a three-hour format. During this fast-paced session, participant will use tools and learn new ways to impress and engage participants when:

- Informing
- Seeking Feedback
- Brainstorming
- Collaborating
- Making a Decision

### The Course Includes:

Guided practice identifying effective tools for an actual online meeting

Introduction to nearly 20 tools for supporting online collaboration

Hands-on experience with multiple tools

After the class, participants receive a comprehensive resource list of recommended and popular tools

**Course Length:** One 3-hour session.

**Prerequisite:** Although not required, Designing Powerful Online Meeting Experiences is recommended.

**Participants:** Minimum number is 8. Maximum number is 30.



## **ToP Strategic Planning Online**

ToP Strategic Planning – Online Edition preserves the richness of the face to face version and moves it into the virtual world. Highly participatory, the Online Edition breaks down barriers and builds engagement wherever you may be.

### **Participants build the capacity to facilitate participatory strategic plan by learning to:**

- Enable geographically dispersed teams to actively engage in strategic planning processes
- Generate high levels of participation and commitment
- Enable a group to commit to a common vision and own the resulting plan
- Align members around common goals and long-term strategies
- Facilitate teams in discovering big breakthroughs
- Lead a structured planning process that results in concrete accomplishments
- Motivate groups and organizations to take focused action

### **ToP Strategic Planning Online is designed for individuals who want an interactive and creative learning approach and who want to:**

- Experience, practice, and learn to facilitate the complete strategic planning process
- Facilitate strategic planning face to face or online
- Experience this robust process in an engaging virtual format that deepens skills with ToP methods
- Collaborate with large numbers of stakeholders to develop long-term strategy quickly
- Leaders who depend on others for successful implementation of organization strategies

## **Agenda**

There are five 3.5-hour sessions over 5 days. Each session is devoted to one of five phases of developing a strategic plan:

- **Day 1:** Preparation and Design
- **Day 2:** Practical Vision
- **Day 3:** Underlying Contradictions
- **Day 4:** Strategic Directions
- **Day 5:** Focused Implementation

**The Course Includes:**

- State of the art learning platform accessible via computer (Zoom, Mural)
- A 93-page comprehensive course manual
- Opportunities to facilitate ToP Focused Conversations and Consensus Workshops with instructor coaching
- Small learning groups of 20 maximum
- Group online discussions and reflections of practice
- Practice in an online virtual setting
- Live demonstrations by three expert ToP instructors who are certified ToP Facilitators
- Templates in three online formats (Mural, PowerPoint 365 or Google slides) to ensure your future success
- Certificate of completion
- Continuing education units
- One hour of complementary facilitation coaching after the course

**Course Length:** Five 3.5-hour sessions over five days.

**Prerequisite:** ToP Facilitation Methods is required.

**Participants:** Minimum number is 10. Maximum number is 30.

# Section Two

## Core Methodologies in the Technology of Participation

# 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

# 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® 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

# Section Three

Building on the  
Core Methodologies

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## **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

# Section Four

## Specialty Courses

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## **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

# Section Five

## Technology of Participation® (ToP) **Supplemental Information**

[www.topspf.org](http://www.topspf.org) • [www.kolbecompany.com](http://www.kolbecompany.com)

## 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.