



## 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:** Professional Services

**Contract Number:** 47QRAA18D002T

For more information on ordering from Federal Supply Schedules go to the GSA Schedules page at [GSA.gov](http://GSA.gov).

**Contract Period:** December 24, 2022 – December 23, 2027

**Current through Mod PS-0019 Effective 12/11/2024**

**Contractor:** HEIDI KOLBE & COMPANY  
5425 Hemlock Dr  
Soda Springs, CA 95728

**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:** n/a

**Web Site:** [www.KolbeCompany.com](http://www.KolbeCompany.com)

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**Contract**

**Administration:** Heidi Kolbe

### CONTENTS

Customer Information	2
a) Management Consulting Pricing	3
b) GSA Labor Categories	4
c) Training Courses Pricing	7
The Kolbe Company Services	8
a) 541611 Management Consulting	9
b) 611430 Training Courses	10
Training Courses Catalog	11

## CUSTOMER INFORMATION:

### 1a. Table of Awarded Categories:

Category	Category Description
541611	Professional Services – Business Administration Services – Management Consulting
611430	Professional Services – Training: Instructor Led Training, Web Based Training and Education Courses, Course Development
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. **Not Applicable.**
- 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. **See pages 3-4.**
2. **Maximum Order:** \$1,000,000.00 for SINs 541611, 611430 & \$250,000.00 for SIN OLM
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.
9. **Foreign items (list items by country of origin):** None
- 10a. **Time of Delivery (Contractor insert number of days):** Specified on the Task Order
- 10b. **Expedited Delivery:** Contact Contractor.
- 10c. **Overnight and 2-day delivery.** Contact Contractor.
- 10d. **Urgent Requirements.** Contact Contractor.
11. **F.O.B Points(s):** Destination
- 12a. **Ordering Address(es):** Same as Contractor
- 12b. **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
13. **Payment address(es):** Same as company address
14. **Warranty provision.:** Contractor's standard commercial warranty.

- 15. **Export Packing Charges (if applicable):** N/A
- 16. **Terms and conditions of rental, maintenance, and repair (if applicable):** N/A
- 17. **Terms and conditions of installation (if applicable):** N/A
- 18a. **Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable):** N/A
- 18b. **Terms and conditions for any other services (if applicable):** N/A
- 19. **List of service and distribution points (if applicable):** N/A
- 20. **List of participating dealers (if applicable):** N/A
- 21. **Preventive maintenance (if applicable):** N/A
- 22a. **Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants:** N/A
- 22b. 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 standard scan be found at: [www.Section508.gov/](http://www.Section508.gov/). **NOT APPLICABLE**
- 23. **Unique Entity Identifier (UEI):** C5KSQTML4LM8
- 24. **Notification regarding registration in System for Award Management (SAM) database:** Registered

## 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	\$111.00

SCLS Eligible Labor Category	SCLA Equivalent Code Title	Wage Determination No
Project Manager II - Facilitator	15050 Computer Based Training Specialist	2015-5632

The Service Contract Labor Standards, formerly the Service Contract Act (SCA), apply to this contract and it includes SCLS applicable labor categories. Labor categories and fixed price services marked with a (\*\*) in this pricelist are based on the U.S. Department of Labor Wage Determination Number(s) identified in the SCLS/SCA matrix. The prices awarded are in line with the geographic scope of the contract (i.e., nationwide).



## **GSA LABOR CATEGORIES – THE KOLBE COMPANY**

### **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.

## Training Courses Pricing: Category 611430

Course/Training Name	Course Length	Min Participants	Max Participants	Location	GSA Awarded Prices
ToP Facilitation Methods: Leadership Edition (Public Training)	3 days	1	1	Customer Facility	\$1,550.00
ToP Facilitation Methods: Leadership Edition (In-House, up to 10 participants)	3 days	4	10	Customer Facility	\$15,500.00
ToP Facilitation Methods: Leadership Edition (In-House, 11-20 participants)	3 days	11	20	Customer Facility	\$30,070.00
ToP Facilitation Methods: Leadership Edition (In-House, 21 -30 participants)	3 days	21	30	Customer Facility	\$43,710.00
ToP Accelerated Action Planning (Public Training)	6 hours	1	1	Customer Facility	\$500.00
ToP Accelerated Action Planning (In-House, up-to 10 participants)	6 hours	4	10	Customer Facility	\$5,000.00
ToP Accelerated Action Planning (In-House, 11-20 participants)	6 hours	11	20	Customer Facility	\$9,700.00
ToP Accelerated Action Planning (In-House, 21-30 participants)	6 hours	21	30	Customer Facility	\$14,100.00
ToP Action Planning and Accelerated Action Planning (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Action Planning and Accelerated Action Planning (In-House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00
ToP Action Planning and Accelerated Action Planning (In-House, 11-20 participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Action Planning and Accelerated Action Planning (In-House, 21-30 participants)	1 day	21	30	Customer Facility	\$19,740.00
ToP Facilitation for Innovation: Inspiring Group Creativity (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Facilitation for Innovation: Inspiring Group Creativity (In-House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00
ToP Facilitation for Innovation: Inspiring Group Creativity (In-House, 11-20 participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Focused Conversation (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Focused Conversation (In-House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00
ToP Focused Conversation (In-House, 11-20 participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Focused Conversation (In-House, 21-30 participants)	1 day	21	30	Customer Facility	\$19,740.00
ToP Focused Conversation Method: Brain Based Leadership (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Focused Conversation Method: Brain Based Leadership (In- House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00

ToP Focused Conversation Method: Brain Based Leadership (In- House, 11-20 participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Focused Conversation Method: Brain Based Leadership (In- House, 21-30 participants)	1 day	21	30	Customer Facility	\$19,740.00
ToP Consensus Workshop (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Consensus Workshop (In-House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00
ToP Consensus Workshop (In-House, 11- 20 participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Consensus Workshop (In-House, 21-30 participants)	1 day	21	30	Customer Facility	\$19,740.00
ToP Strategic Planning (public course)	2 days	1	1	Customer Facility	\$1,050.00
ToP Strategic Planning (In-House, up to 10 participants)	2 days	4	10	Customer Facility	\$10,500.00
ToP Strategic Planning (In-House, 11-20 participants)	2 days	11	20	Customer Facility	\$20,370.00
ToP Strategic Planning (In-House, 21-30 participants)	2 days	21	30	Customer Facility	\$29,610.00
ToP Approaches to Environmental Scanning (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Approaches to Environmental Scanning (In-House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00
ToP Approaches to Environmental Scanning (In-House, 11-20 participants participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Secrets of Implementation (public course)	2 days	1	1	Customer Facility	\$1,050.00
ToP Secrets of Implementation (In-House, up to 10 participants)	2 days	4	10	Customer Facility	\$10,500.00
ToP Secrets of Implementation (In-House, 11-20 participants)	2 days	11	20	Customer Facility	\$20,370.00
ToP Secrets of Implementation (In-House, 21-30 participants)	2 days	21	30	Customer Facility	\$29,610.00
ToP Social Process Triangles (public course)	1 day	1	1	Customer Facility	\$700.00
ToP Social Process Triangles (In-House, up to 10 participants)	1 day	4	10	Customer Facility	\$7,000.00
ToP Social Process Triangles (In-House, 11-20 participants)	1 day	11	20	Customer Facility	\$13,580.00
ToP Social Process Triangles (In-House, 21-30 participants)	1 day	21	30	Customer Facility	\$19,740.00
ToP Secrets of Implementation Online (individual in public course)	4 - 3.5 hour sessions	1	1	ONLINE	\$1,050.00
Accelerated Action Planning Online (individual in public course)	2 - 3 hour sessions	1	1	ONLINE	\$500.00
ToP Strategic Planning Online (individual in public course)	5 - 3.5 hour sessions	1	1	ONLINE	\$1,050.00
ToP Facilitation Methods Leadership Online Intensive (individual in public course)	9-2.5 hour sessions	1	1	ONLINE	\$1,550.00
Meetings That Work (individual in public course)	2 days	1	1	Customer Facility	\$1,050.00



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## 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 skills 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 in this schedule.

## **Technology of Participation (ToP®) Course Offerings**

- ToP® Facilitation Methods: Leadership Edition, page 11
- ToP® Focused Conversation, page 12
- ToP® Focused Conversation: Brain Based Leadership, page 13
- ToP® Consensus Workshop, page 14
- ToP® Action Planning and Accelerated Action Planning, page 15
- ToP® Accelerated Action Planning, page 16
- ToP® Strategic Planning, page 17
- ToP® Secrets of Implementation, page 18
- ToP® Approaches to Environmental Scanning, page 19
- ToP® Facilitation for Innovation: Inspiring Group Creativity, page 20
- ToP® Social Process Triangles, page 21
- ToP® Secrets of Implementation Online, page 22
- Accelerated Action Planning Online, page 23
- ToP® Strategic Planning Online, page 24
- ToP® Facilitation Methods Leadership Online Intensive, page 25
- Meetings That Work, page 27
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## 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 is 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 to do so.
- 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: 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 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<sup>®</sup> 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 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 is 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:** Six hours

**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-maneuver 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 or permission of the instructor

**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

## ToP<sup>®</sup> 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

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## ToP Secrets of Implementation Online

*Course is designed for facilitative leaders who want an engaging and interactive process to implement strategies either online or in person. Learn online tools & 40 keys to facilitating the implementation of plans and strategies with groups. This interactive course presents the four-phase implementation journey, strategies to build and sustain momentum, and process tools for adjusting plans when faced with challenges. Comprehensive manual, templates for online use, and resources are provided.*

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

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## Accelerated Action Planning Online

*For team leaders who want to develop a project action plan with a small team of less than 12 participants. This hands-on interactive course presents an 8-step process to ensure all the practical details for a successful project are covered. Teams can plan a project or event in just two hours using this template-based process. Students receive templates for use on-line or in person and a handout describing the action planning process.*

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.

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## ToP Strategic Planning Online

*Participants learn to lead strategic planning using the powerful Technology of Participation (ToP) facilitation tools and a five-step process. Learn to develop shared vision, goals, and strategies to create team alignment. This structured process generates high levels of commitment and participation. Tools, templates, and a comprehensive course manual are provided for online and in person use. ToP Facilitation Methods is a prerequisite. 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.

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## ToP Facilitation Methods Leadership Online Intensive

*Participants learn and practice facilitating three powerful Technology of Participation (ToP) Facilitation Methods – the ToP Focused Conversation, the ToP Consensus Workshop and ToP Action Planning. The course incorporates virtual tools, reference materials, and personal coaching to increase collaborative leadership capacity. This nine-session modularized course over six weeks provides ample practice time to apply the learning at work.*

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 three 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 3 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 three weeks.

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



## Meetings That Work

***Participants learn 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. Participants learn effective and efficient ways to maximize input, decision making and commitment while utilizing the expertise of everyone in the room. Diversity in the group becomes one of its greatest assets.***

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 indecision 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