

**Documentation for the TTN 2011 Virtual Training Work Team Meeting
Monday, February 15, 2010 | Adobe Connect Pro & Maestro Conference
Penny McDaniel – Facilitator | Ester Mae Cox – Technical Orchestration**

Attending: Cheryl Kartes, Nadine Bell, Penny McDaniel, Sheila LeGeros, Catherine Tornbom, Jean Watts, Ester Mae Cox

AGENDA

- 1) Introductions
- 2) Team Ground Rules
- 3) AP - Victory
- 4) AP - Current Reality
- 5) AP - Commitment
- 6) AP - Action Steps
- 7) Reflection & Next Steps

What is your history with ToP?

Cheryl Kartes: began training journey in 1994

Nadine Bell: I began the training journey in 1992.

Sheila LeGeros: Began learning ToP March 2007

Jean Watts: Since we created it in Fifth City 1968

Penny McDaniel: About the same time as Sheila March 2007

Catherine Tornbom: Qualified in 1999

Ester Mae Cox: First ToP Class was December 1998

What is your experience with virtual facilitation?

Nadine Bell: I have facilitated a consensus workshop and been involved in 3 online facilitations.

Sheila LeGeros: 18 months of extensive exploration and client experience

Cheryl Kartes: tried GroupMind, MindNeister, iMap, Google docs, MaestroConference, Elluminate, Adobe Connect Pro, facilitated 2 CW, helped with other sessions, etc

Catherine Tornbom: About 10 months of serious exploration, both as a participant and facilitator.

Jean Watts: Just starting to learn online facilitation

Penny McDaniel: Using basic tools for several years, frequently use some virtual platform for planning meetings, proposals, etc. Last year active on ToP Virtual team and really began exploring more robust technologies. Have facilitated some ToP Virtual Team meetings, a couple of client meetings, and several board meetings for some non-profit organizations.

What drew you to this team?

Cheryl Kartes: longtime dream that we could move ToP towards effective virtual work

Sheila LeGeros: I'm eager to begin teaching virtual facilitation

Nadine Bell: On line facilitation extends our reach and impact.

Jean Watts: Want to begin online ToP training and facilitation

Catherine Tornbom: Exciting and interesting

Penny McDaniel: Love this area, believe it is the future, want to begin teaching and facilitating more virtually

Ground Rules Discussion Notes

A) What are the greatest challenges to virtual teaming?

- Building trust with the team and where that is an issue is when team runs into trouble (particularly when team has not met F2F before)
- Epitomizes the challenges I'm having right this second, ready to print documents, and printer is not willing to print - unexpected problems pop up even with outstanding preparation!
- Keeping people engaged in the participation - to know when to participate and how to participate
- Can't read - can't do color, can't make it user and reader friendly
- Without the visual cue, it's like listening with one ear - missing a lot (missing visual cues)

B) What are best practices you have used related to ground rules for virtual team - both asynchronously and synchronously?

- Really important to get people's attention up front - a lot of people have an image that virtual image they are going to WebEx.. a negative image... horrified that we are going to collaborate in WebEx... tell them this is different thing...
- Prep Work - that everyone has as much advantage as possible - then with there are glitches, things can still happen positively - Start early to be comfortable with technology - start early and often
- Providing very clear information in invitation to participate - correct link to get on visually and audibly - to use VoIP be sure they know the protocols before the meeting starts
- Whatever is said or written online, the intent is positive - the author intends for it to be positive
- People not familiar with each other should speak their name as they begin speaking
- Don't make the same person first or last each time

Agreed Virtual Training Team Ground Rules

- Say name first when speaking
- Arrive to the session at least 10 minutes early.
- Prepare for our meetings as if we were preparing for a client; be understanding if preparation is less than stellar
- Don't talk over others on call
- Commit to doing the prep work prior to our meetings.
- Respond to team emails, if requested, in a timely manner
- Give honest reflection and suggestion helps to each other as we learn

- Be clear if you need a response from team members and by when you need it
- Use "meeting chat" to make side comments or ask for help
- Hold the values of full participation while being flexible as to its implementation.
- Clarify roles and responsibilities with co-facilitators and lead client
- Be flexible to request guidelines depending on the situation

ACTION PLANNING

Victory Circle Ideas from Constant Contact Survey

- Knowing criteria for choosing virtual tools
- Participants are really wowed -- they feel like, "I can do this!"
- Warm hugs and smiles all around -- people are really happy
- Celebration event at night to celebrate the work of the virtual team that
- Includes something really fun for all, -- maybe a goofy skit to reflect back on the work of the past two years
- People saying "I can do this."
- Lots of people interested. Great feedback
- People jazzed about using ToP methods & processes virtually
- The Network wanting more
- People understand the difference between synchronous and asynchronous.
- Knowing appropriate asynchronous tools
- 80 people attending some part of the training. Pre-conference online learning sessions (ahead of the conference - early January). Demonstrations of various tools and ToP methods.
- All Virtual Team Members demonstrating/presenting. Keynote speakers presenting virtual trends for 2011 and beyond. Mobile device apps demonstrated. Online resource directory of ToP Trainer Virtual resources.
- Books written, papers on Internet, ToPpers at conferences! People being interviewed - ToPpers pulling down large contracts and MOBIS contracts so fast it's hard to keep up
- People excited to do more virtually. TTN feeling more confident. I see a one to 3 day event that would have
- 2 to 3 pre-course online events associated with it. 2 to 4 available online software (virtual facilitation tools) like Adobe Connect Pro, Elluminate, etc -- would be 'taught' during the training day.
- Participants have had an opportunity to facilitate an on line session-even a small group session.
- Participants have partnered with someone they will continue to co facilitate on line sessions throughout the coming year.
- Participants feel confident that they can facilitate on line sessions.
- Participants know where they can get the answers to the questions.
- Participants understand the plus/delta's of the various platforms and how they compare with each other.

- Participants would register at least 2 months in advance of the meeting. There would be opportunities to participate in facilitated events that showed how use online software to facilitate TOP methods.
- Pre-TTN meeting events would focus on being a 'participant' in facilitated virtual ToP methods. The training at the TTN meeting would focus on being a 'facilitator' of virtual TOP methods. It would teach participants each of the tools and how to use them to facilitate ORID, Consensus Workshop and Action Planning.
- During the training there would be either a bank of computers, or participants would come with software pre-loaded to their laptops
- Like a collective face to face sandbox to experience using the software
- A well defined series of pre-steps to be sure potential participants in the training have the basics of virtual/cloud computing in place such as: a computer with capacity; practice with the easiest of virtual platforms such as TimeBridge, freeconferencecall.com and Survey Monkey-type programs; registered with Facebook and Linked-in; created or had significant input to their own webpage...etc. This would start mid-year w/ an invitation to entire network so that we have a large group of people more comfortable with the cloud.
- 20 participants in the actual face-to-face 2011 training learning 2-3 key platforms that have worked well for the majority of the virtual team/sub-teams during 2010.
- Consider the training in two parts - first part Virtual and the second part fact-to-face
- 10 virtual team members trained to be trainers for the training in 2011.
- 10 virtual team members commit to the pre-steps work
- Eliciting the imagination of those who had not previously considered going virtual prior to the training and just took our training out of curiosity.

Current Strengths Ideas from Constant Contact Survey

- Energized TTN network
- Network wanting to learn virtual
- Enthusiasm for virtual
- Commitment to do this project
- Lots of talented people
- Good technology
- 11 months to get ready
- Have almost a year to plan this event
- We must interact virtually, which means we'll learn a lot together
- Diversity of our team members -- veterans, newbies, various part of the country, ages, stages of ToP Trainers
- Asked TTN team for \$1000 seed money to be in the budget
- We have some expertise in training and virtual facilitation on the team
- There is a strong commitment from many on the team
- The team from last year that has already done an incredible amount of research on available platforms.
- The experience of Jo/Wayne/Sheila/Cheryl others who have used software with clients.

- With evidence of paying clients it should be easy to sell this training to TTN members.
- We have many sessions and breakouts to be facilitated.
- We have many people interested in virtual facilitation and we have a broad range in skills.
- We have outstanding coaches who can support us in the practice
- We have knowledgeable people who can put together a list of resources to which we can refer to answer questions.
- We have people with experience in the different on line programs that can answer a list of questions that are pulled together in advance of the meeting so we can compare them.
- Our team is filled with flexible, adaptive, creative facilitators who can make this software work for them.
- ToP methods are already very structured; they are easier to translate to a virtual context than some other methods.
- If we create standardized virtual media for particular software (maybe PPT's that we can load up to automatically guide through an action planning process, or a 'pod' guide for ORID, etc.) it's a great 'product' to sell. Maybe, somewhere down the line, there could be a way to work with Adobe Connect Pro or Elluminate etc. to get tailored media?
- All year to practice with the software ourselves.
- We have a year to accomplish this
- The TTN wants it
- Committed: We have lots of committee members
- Experience: Lots of Virtual Team experience from 2009 to build upon
- Motivation - compelling need for all of us in the TTN Network to be brought up-to-date and be more than competent in using the tools
- Experience: We have the best experience in foundational participatory values and practice than anyone in the world
- Concrete create experience facilitating virtually.

Current Weaknesses from Constant Contact Survey

- Not enough Diversity
- I don't see any weaknesses. All is good
- Enthusiasm greater than time available
- Limited ability to buy tools to experiment with
- Fear of unknown - trying new things
- We are all busy - time to work together and on the project
- The costs of some of the better technologies are high
- Keeping the momentum going throughout the year
- ToP is heavily reliant on the 'art' of facilitation, being able to read the group and reshape the energy - much of it's appeal will be lost in a virtual context.
- It will be hard to brand a 'virtual facilitation' training as ToP without clear delineation of the design patterns of the method and how they are reflected in the virtual landscape.

- Getting all the participants cued up with the software they might need on their computers before participating (Java, maybe others) is largely out of our control. (If done in the training would be a huge time suck).
- Some of us have a mind set that it is difficult and/or we can't do it.
- We have many people who want to learn on line facilitation and limited time to devote to the learning and practice.
- People are very busy and may not be able or willing to put in the practice time needed for mastery.
- We are not all using the same on line program for on line facilitation.
- Licensing issues blocking us from using the software broadly?
- Learning multiple software platforms in one training event could be incredibly confusing.
- Each of us has different software preferences, choosing one to work with could be limiting.
- Time. It takes a long time to be comfortable with the range of functions available on any of these software platforms.... especially for those of us not immediately tech savvy.
- Client and work commitments
- Bite off more than I can chew
- Some adversity to risk-taking
- Time: There is not much time for us to accomplish my hopeful vision
- Competition: Lots of other things in my life to do
- Participants not skilled in computer skills and learning new software quickly

Dangers of Success from Constant Contact Survey

- Everyone in TTN wants to become ToP virtual instructors all at once!
- Done so well that memberships requests repeat performance midyear in 2011 and again in 2012 TTN Meetings
- Overwhelmed by requests for virtual facilitation and can't meet all of them
- We may have to provide a lot more training to the TTN
- We each spend way too much time in front of the computer.
- "Technology" of Participation - we get confused for a 'virtual facilitation' brand.
- We will be going after the same customers.
- Tight budgets become an excuse to cancel planning and learning events in favor of a 'virtual meeting' that short-shifts relationship building aims.
- Software crashes our computers
- Those of us on the team and in the network get so much client work doing cloud work we don't have time to work on the team goals and mentoring our colleagues.
- We may dilute our participatory philosophy and lose the unique value proposition we bring to facilitation
- Not ready to meet the demand

Benefits of Success from Constant Contact Survey

- I can use it in my own business
- We can move ToP into the virtual world
- TTN will feel more up to date and confident
- ToPpers use virtual tools to supplement F2F work
- Preparing to teach virtual facilitation will inform us where we are deficient in virtual facilitation. The benefit of this is it will show us where we need to develop ourselves.
- Learners and presenters are fabulously competent virtually
- ToPpers getting enough virtual work to allow creative juices to flow creating more virtual work
- ToPpers are better trainers as they learn more about essence of what is ToP in designing virtual events
- We can change the way virtual meetings are being done by most of the population
- I would like to see us use the TTN meeting as a way to pilot our first course on virtual facilitation, and get their feedback/critique so that we can fine-tune the course before our first public offering.
- Breaking open a whole new market for some of our members.
- An opportunity for more long term client relationships if you aren't required to be flown in for every meeting but can continue to facilitate ongoing committee work etc, virtually.
- We can partner with facilitators who do not live near us.
- The facilitators in our TTN network will be able to reach more people because we do not have to be face to face.
- We can have greater impact. | We can work a synchronously.
- Our TTN Task Team meetings can be more robust on line.
- Folks who can't attend TTN meetings can participate from afar.
- Great potential for more 'citizen engagement' work and input gathering into policy making processes - especially if using asynchronous software.
- More potential for working with international groups.
- If we can create a little more 'standardized' virtual meetings – with clearly anticipated beginnings, middles and ends.... participants can self-manage their participation better.
- We move ToP Training into this decade with a bang
- We are busy with paid virtual work all the time
- ToP getting fabulous free publicity world wide
- Virtual work pays for the investment in tools
- Learning is beautiful
- As a network we are competent on multiple delivery systems of participatory methods
- We've successfully modeled collaborative work and mentoring
- Becoming established as the best virtual facilitators using participatory methods

Discussion Comments about Victory and Current Reality

- People are quite ambitious
- Combination of very concrete and very imaginal and out in the ethers
- These are all wonderful and would be great to stage them
- Want to pick the ones that give us a real win in 2011
- Pretty thorough
- Get these collected and back out to people for read ahead of time so not reading them together in the meeting

Discussion On the Way to Determining Commitment

- For those not wanting to dive in, coaching them, training them, in that process we learn how to teach it...
- Difference to commitment to virtual team - time and \$\$ commitment
- Participant on the team – Learning to drive the bus... as passenger, you can observe and learn about driving the bus, but to learn how to drive the bus, you have to actually drive the bus.
- Request discussion - huge variety of stuff proposed in that victory - What really is optimal thing to do at that meeting in January?
- Need a shared practical vision - don't have the foggiest idea what we're saying in the victory
- Have to see something - bank of computer pre-loaded with software - some ideas are very abstract
- Wondering if we've got a difference between those who have been on the team and those who are new to the team.... I see many of the ideas as possible - Not sure where that leads us
- What is optimal way to do the training to train people on virtual - very challenging to teach virtual in F2F. - Thinking it needs to be done over time - 90 minutes is optimal time for virtual event - an enormous amount of knowledge transfer needs to happen - how can we chunk something out?
- Could be an introduction to the world of virtual - with opportunity to sign up for more OR have sessions first and then learning and reflection at the TTN meeting
- Couple of my suggestions was to start 6 months out - encourage people to do the most basics - some are not using social media - basic agility to get around the web - might want to do levels - where we gradually develop the capacity of our members - first with basics, and then more advanced stuff
- Need to do training virtually - when and how do we start?
- In this group, we have a wide variety of experience - we need to get the newbies up to speed - one of our first tasks
- Virtual training before the conference - put together materials - conference may be opportunity to get people enrolled and excited
- When we get the newbies up to speed, that will inform the later work
- Some of us (number 10) to follow on Sheila's idea - agree to work out training guidelines, we want to get them people-sized (not huge) - help us to get to the next level - get the license and then go nuts with it.... sort of a way to step into that - be

concrete as possible as we start and would like to be measurable ideas so we will be clear about whether or not we achieved it

- First image I have is "waves" - we have different styles - some want to dive in; some want to put their toe in the water; so maybe we offer several styles - some want just information
- Needs to be a clear (pre-requisites given at TTN meeting – for Virtual Team members) - Experimented as a participant - I have played with Elluminate - don't have experience with Adobe - just playing with Sunny's Elluminate
- To offer virtual training in different styles
- To offer sessions before the end of 2010
- To do a practical vision - to shape vision with more discussion
- Question what exactly does the training itself look like? What are we putting in place? Need to get the right question.
- What kind of training are we actually doing?
- What will that look like?
- Not wanting another team meeting

Commitment Consensus

We are committed to creating a series of online virtual learning experiences to bring our team up to speed virtually and to prepare to train other TTN members before or after the January 2011 TTN meeting.

Key Action Notes: What do we need to work on between now and early May?

- Get everyone up to speed on technology between now and May 1
- Jean Watts - wanting more experience
- Nadine - done a little bit on Adobe and little bit on Elluminate
- Catherine - technology piece on Elluminate - wanting more - Also Cheryl Kartes
- Cheryl - for those exploring any one of the particular media - each of them should be tracking best practices, and steps to follow - so these are captured and able to be shared with others
- How do we combine dualities of limited time and trying not to do too much? An idea.... very best way I've learned... get a partner... Figure out best ways to work together.... get together on a moment's notice.... getting partners that are committed to each other and push each other....
- Get learning partners....
- Find a learning partner and practice with at least one tool proficiently
- Jean working with Sunny on Elluminate - Sunny has decided on Elluminate
- Choose learning partner - choose technology for a situation... One of the huge factors is the client themselves - what is comfortable with?
- Somehow offline - who is looking for learning partner with specific tool/technology - what are people interested in learning? Do you want to be included as people are experimenting with learning a technology?
- Have a partner to look around

- Between now and early May, every team member will work to be up-to-speed in knowing how to facilitate virtually

A Reflection Question: We had an opportunity to hear and see what team members put down in the victory and current reality for our ToP Virtual Training Team's action plan - what words or images stand out?

Penny McDaniel: we had a lot of variety in ideas

Jean Watts: Commitment statement

Nadine Bell: Lot's of people interested.

Sheila LeGeros: Big dreams and visions -- that are supportive of TTN

Nadine Bell: I can do this!

Catherine Tornbom: A complex Ven Diagram showing the interconnectedness and complexity of our task, yet contained in a form.

Penny McDaniel: Seems like a lot of interest

Cheryl Kartes: Our commitment is starting to grow to match some of our vision

Nadine Bell: We learn from training the new members of our team

B Reflection Question: When considering our new ToP Virtual Training Team, Where are you most excited? Most concerned?

Sheila LeGeros: Excited to be finally thinking about training -- we've worked hard to get to this stage

Penny McDaniel: I am excited about learning more and teaching it to others since you learn best what you teach

Catherine Tornbom: Most excited about learning from each of you; most concerned that I'll miss gems of wisdom.

Nadine Bell: Excited we are learning virtual facilitation and we are learning how to teach it effectively.

Jean Watts: Trainers of us newbies are already overworked

Cheryl Kartes: ex= learning with each other

Penny McDaniel: I am concerned that we have a lot of work ahead of us and fitting it into my schedule

Sheila LeGeros: I am concerned about when will I start to earn money for training?

Nadine Bell: Concerned we all have full plates and there is so much to do.

C Reflection Question: In addition to creating our victory and current reality we determined our commitment as a team, what insights does this give us about the team? What difference will achieving our commitment make to us? The TTN? The field of facilitation?

Sheila LeGeros: We are all in this together

Penny McDaniel: The team is very thoughtful and wants to do a good job

Nadine Bell: We agree on what we will be doing.

Cheryl Kartes: we all have important things to contribute

Nadine Bell: We are interested in sharing and learning as much as we can from each other.

Catherine Tornbom: This whole process is a series of incremental steps - we are taking some of those step together and some individually, but all with lots of support.

Penny McDaniel: It will keep ToP alive and growing in the field, it will keep the field moving forward

Jean Watts: more exposure of participatory facilitation

Cheryl Kartes: we will be moved forward as a collective entity

D Reflection Question: Many of the tools we used today you may have experienced before, such as Adobe, TimeBridge, Maestro Conference, a Survey Tool from Constant Contact - what did you find easy? Most difficult?

Sheila LeGeros: I found the survey in Constant Contact very easy

Nadine Bell: Easy writing the answers to the questions.

Cheryl Kartes: survey didn't work at all for me

Nadine Bell: difficult staying on top of all of the answers.

Penny McDaniel: Easy putting stuff on screen, not so easy seeing all of it

Cheryl Kartes: TimeBridge is great way to find the best time for folks

Jean Watts: maestro conference, TimeBridge, survey are all easy to participate in; adobe seems to have more limitations

Sheila LeGeros: I couldn't download the PDF at first -- finally found it in my downloads

Penny McDaniel: Getting the survey answers out in advance would be helpful versus reading all in the meeting

Catherine Tornbom: Each time I experience a colleague facilitating one of the platforms, I learn something new. Today was about design and engagement. Always mindful of participation and styles of processing.

Nadine Bell: difficult some of the answers to the survey questions were not captured in writing so we could see them.

Cheryl Kartes: MaestroConference can be really useful as a host/facilitator

E Reflection Question: We won't meet virtually, at least synchronously, until after the IAF Conference but when we do what would we change or do differently from this meeting?

Sheila LeGeros: Give us a pre-read

Cheryl Kartes: pre-work has more time to prepare

Jean Watts: Use Elluminate so we can talk over the computer instead of over the phone

Nadine Bell: See the answers to the questions before the meeting so that we are prepared to discuss them.

Penny McDaniel: get survey results sooner and post results so everyone has read and can reflect on before meeting - don't read all of the pieces

F Reflection Question: What are the next steps for this team?

Penny McDaniel: figuring out a schedule of when to meet and how often

Penny McDaniel: Everyone practice practice practice

Ester Mae Cox: Penny & Ester Mae will post this skeletal Action Plan to Huddle on behalf of our team

Sheila LeGeros: Thank you to Ester Mae and Penny for facilitating tonight. Greatly appreciated!!!

Nadine Bell: Penny I don't think you heard me say that I am interested in mind jet too.

Jean Watts: Thanks for excellent facilitation

Nadine Bell: Muchas gracias