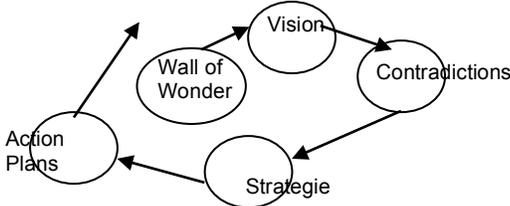<table>
<tr><td colspan="2" align="center">ToP Strategic Planning Design Pattern
Application Level</td></tr>
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The Big Picture

Name	**ToP Strategic Planning**
Overview	The ToP Strategic Planning method enables a group to create a set of strategies and practical action plans for implementation. It enables each person to contribute, builds consensus at each step and generates commitment to successful implementation It includes a series of 5 workshops. Historical Scan – Wall of Wonder Practical Vision Underlying Obstacles – Contradictions Strategic Directions Action Planning
Metaphor	We can move forward together.
Graphic	
Logical Framework	The Wall of Wonder places the planning within the organization's own historical context as well as the field of endeavour and the related events in society. It provides the group with an opportunity to rehearse its history and become conscious of its accomplishments, strengths and possibilities as well as its setbacks, weaknesses and dangers. It prepares the group to look at their future. The time considered is usually the whole life of the organization. The Vision workshop enables the group to articulate what it wants to achieve and the situation it wishes to put in place. It provides the group with a sense of purpose and prepares them to examine their current situation. The time horizon is usually 5 years. The Contradictions – Underlying Obstacles workshop enables the group to examine the barriers it will need to address in order to achieve the vision. It provides an understanding of the systemic and strategic issues that prevent forward momentum. The time horizon under consideration is the present and short range future. The Strategies – Strategic Directions workshop enables the group to create strategic initiatives that will address the barriers and move the organization toward achieving its vision. It provides the group with practical strategic directions from which strategic initiatives can be created. The time horizon is 1 ½ - 2 years. The Action Planning workshop enables the group to create practical initiatives to carry the strategic directions forward. It grounds the vision in concrete actions and

	provides a schedule of tasks. The time horizon is usually 3 – 6 months. In some cases, it is as long as a year.
Pattern of Collaboration	**Generate** **Reduce** **Clarify** **Organize** **Evaluate** **Consensus Building - Commitment**
Best uses	
Do not use	
Notes Contributor's explanation	

	Rational Aim	Experiential Aim	Product		
	The group will build a consensed upon set of strategies to move forward in the specified area.	Each member will contribute. The group will form a consensus. The group will be committed to success.	Results of the workshops – A set of strategic directions, specific strategies and action plans.		

Essential Steps								
Assumptions								
ICA Associates	Historical Scan	Practical Vision	Underlying Obstacles - Contradictions	Strategic Direction - Strategies	Action Planning	Benefits Going through the full cycle ensures comprehensiveness	Consequences Some groups do not have 21/2 days to dedicate to this	References
Key Assumptions	Whole history – project future trends May be a conversation, depending on time	Clear areas of consensus on future direction	Solid understanding of systemic and strategic issues	Strategies arranged into major directions	Groups focused on creating action plans they will implement Group may not want to go that far			
Variation Name								
Key Assumptions								
Variation Name								
Key Assumptions								

Script - Copy and use this table to describe each major step in the process. Use it for each methodological variation	
ICA Associates	
Context	
Procedures	These are notes toward the creation of design pattern variations of the Historical

	Scan, ToP Consensus Workshop and Action Planning methods
	Historical Scan What is done is highly related to the time available. In some cases, this step is shortened to a conversation, a brainstorm of accomplishments and a reflective conversation or not included. When the full time is available, the classic Historical Scan procedures are used. There are always some variations in the interpretive level procedures that are related to the specific situation, context and needs of the group. **Practical Vision – Underlying Contradictions/ Obstacles – Strategic Directions** Classic ToP Consensus Workshop procedures are followed. A procedural variation in the naming section includes a focused conversation on each cluster of ideas that enables the group to create an appropriate name for the cluster of ideas. This is true for all consensus workshops done by Canadian trained facilitators. The naming convention used in the Obstacles workshop is (1) name of the block, (2) how it blocks and (3) what it blocks. Statement of the name may reverse # 2 and #3. **Action Planning** The ToP Action Planning Workshop is used. The DesignPattern developed by Wayne Nelson is very close to what is done. In some cases, the steps are altered to meet the needs of a specific group. Some organizations have asked us to strengthen it as an accountability framework. Some have asked us to simplify it to accommodate the capacities and time restrictions of the participants.
Ground Rules	

Using this design pattern - - in a face to face or virtual environment

Described for a Face to Face Environment

Group size	This process has been used as it is in groups ranging from 10 to over 100
Space needs .	- A blank, flat wall at least 8 feet wide. - Seating at tables enabling everyone to be close enough to the front to read 5" x 8" cards. - Working space for small groups – ensuring enough distance between group to allow each group to have its own conversation without being disturbed by other groups.
Timeframe	Each workshop requires 3 hours.
Tools	Cards – markers – flip charts – Hold-it or a "sticky wall
Pre-event preparation of participants	Invitations – clear time schedule – contextual notes – focus questions and basic descriptions of the key workshops
Atmosphere	A working environment – Décor related to the organization and its mission/ purpose are appropriate
Preparation	Preparation of contexts, instructions and procedures for each workshop with specific modifications made for the specific needs and requirements of each group. Preparation of graphics related to contexts and instructions

Challenges	
Tips	
Modifications	
Example	