NSA-WI Speakers Lab Pilot

PROJECT CHARTER

VERSION: 1.2
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Revision Control

Version	Date	Section	Description	Author
1.0	8/4/17	All	Initial Release	Jacy Imilkowski
1.1	8/22/17	All	Initial Review w/ Roger Wolkoff	Jacy Imilkowski
1.2	8/27/16	Structure	Added section on structure and roles	Jacy Imilkowski
1.3	10/8/17	Project Considerations, Risks	Added considerations gathered during pilot sessions, added risk for session no-show	Jacy Imilkowski

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PURPOSE OF THE DOCUMENT

This document is the project charter of the NSA-WI Speakers Lab Pilot Project

The purpose of this charter is to establish a common understanding between the project sponsors and the project team regarding the goals and objectives of the project. The project charter provides the foundation for the project by documenting:

- Project goals and objectives

- Project scope

- Project work plan

- Project deliverables

- Project organization

- Roles and responsibilities of the project participants

- Risks and the strategies used to mitigate those risks

- Considerations concerning the project

The Project Charter may evolve during the life of the project, but it is the basis for evaluating any changes to project's scope and objectives and assessing the impact of proposed changes on schedules and budgets. The Project Charter is a "stake in the ground" for the project team and it gives the Project Sponsor a basis for evaluating project direction and results.

DEFINITIONS

NSA	National Speakers Association
NSA-WI	National Speakers Association - Wisconsin Chapter
Chapter Member	Phrase inclusive of Academy and Professional members of NSA and NSA-WI
Eloquence	The art of speaking and the use of powerful and persuasive presentations. This means creating the proper setting for an effective presentation as well as the concrete skills related to presenting, performing, and theatrical methods.
Expertise	The knowledge, skills, and experience in a specific area. Speakers should know which body of expertise is ideal for them and be able to effectively research and develop their content.
Enterprise	The purposeful undertaking of a successful speaking business venture. This includes business management, sales and marketing knowledge, as well as the skills necessary to generate income through speaking engagements and other revenue streams.
Ethics	The principles or standards governing the conduct of those in the speaking profession. Ethics is the foundation and summation of the three other competencies. It is about who you are as a person – both personally and professionally – and encompasses your reputation, character, and integrity.

PROJECT OBJECTIVES AND GOALS

The goals of the NSA-WI Speakers Lab are:
- To provide a safe and supportive environment to support NSA-WI members' personal and professional development
- Enhance the overall value of both professional and academy chapter membership.

The project objectives are:

Eloquence
- Provide opportunity for NSA-WI members to refine their platform skills through presentation and peer feedback
- Give participants recordings of their presentations for ongoing learning and benchmarking of development

Ethics
- Create an experience for members to leverage the community (the important second half of our the NSA National Non-Theme Concept, WSLTC)
- Build community and connection among Academy and Professional chapter members

PROJECT BENEFITS
- Safe environment for professional platform skill development
- Additional program to enhance the membership offering of NSA-WI
- Opportunity to showcase NSA-WI offerings to potential members
    - Offer 1-2 sessions/year for the public to attend. This allows more public community members to see what NSA-WI does and learn about Professional and Academy membership.
- Additional Support of Academy members to enhance path to professional membership
- Potential to open up another academy session for other learning if a dedicated session or speaker lab is committed to Academy Platform skills.
    - Purpose of the Academy Platform session is for the academy members to present their "eloquence keystone" in front of professional members
- Deepen relationships between members and strengthen NSA-WI Community.

PROPOSED SESSION STRUCTURE AND ROLES

Sample Facilitator Schedule with 9:30am start. Actual start time is TBD.

9:30	Attendees begin arriving for 10 minutes of fellowship time. Ask attendees to sign the sign-in sheet. Ask speakers if they have an intro they want you to read. Explain the 30 minute time limit and Guest Enricher role. Ask if they want you to cue them at a certain time.
9:40	**<u>BRIEF</u>** Intros – Each attendee share name and what they speak on.
9:50	Start meeting and explain roles: 1. Cell phone ringers off 2. 3 people (names) will speak in this order. Each has a total of 30 minutes. Each speaker has provided each attendee with an evaluation form of the speakers choosing to receive their feedback and suggestions. Please add your name and contact info so speaker can contact you if there are questions. 3. Speakers are working on new or problem material and want ideas on how to improve both content and delivery. Speakers will provide the attendees with the key areas where they want help and also any unique aspects of the audience for whom the talk is designed. 4. Attendees observe the speakers delivery style and listen to their content. 5. Attendees make notes on the evaluation form and then participate in the verbal discussion of ideas designed to help the speaker improve. 6. Give evaluation forms to the speaker 7. Special *Guest Enricher-Evaluator* (GE) offers suggestions (usually 5 minutes)
9:55	First speaker – Present and receive Feedback (comments from GE during the last 5 minutes)
10:25	Speaker and Attendees record ideas on their "Learning Journal" sheet Option (if time): Have a few attendees **<u>BRIEFLY</u>** share an idea they recorded
10:28	Second speaker – Present and receive Feedback (comments from GE during the last 5 minutes)
11:58	Speaker and Attendees record ideas on their "Learning Journal" sheet Option (if time): Have a few attendees **<u>BRIEFLY</u>** share an idea they recorded
11:00	Third Speaker Feedback from all; Invite comments from GE during the last 5 minutes
11:30	Speaker and Attendees record ideas on their "Learning Journal" sheet Option (if time): Have a few attendees **<u>BRIEFLY</u>** share an idea they recorded
11:32	Invite GE to give feedback to Facilitator. If there is time, can add ideas about how we all keep learning, practicing, getting feedback, and getting more professional as speakers.
11:42	Announce next lab. Adjourn the Lab.

PROJECT SCOPE

IN-SCOPE
- Eloquence
- Ethics
- Platform skills development
- Speech evaluation & observation
- Video recording of presentation feedback for ongoing review and learning
- Facilitator Guide for consistent leadership of Speakers Lab Sessions
- Speakers Lab Participation Agreement

OUT-OF-SCOPE
- Expertise
- Enterprise
- Professional quality video recording for the purpose of professional distribution
- Marketing or other business discussion outside of platform feedback

Note – While knowledge of Expertise and Enterprise may be gained thorough the Speakers Lab, they are not primary objectives.

PROJECT PLAN & ESTIMATES

Tasks	Estimated Completion Date
Project Kick Off	7/21/17
Pilot Session 1	8/5/17
Pilot Session 2	8/18/17
Initial Draft of Project Charter to President	8/25/17
Initial Draft of Facilitator's Guide to President	8/25/17
Pilot Session 3	9/16/17
Present Proposal to Board	9/28/17
Pilot Session 4	9/29/17
Board Feedback on Proposal	??

PROJECT TEAM, ROLES & RESPONSIBILITIES

The following table lists the roles needed to successfully complete the project:

Role	Responsibilities	Contact Person
Sponsor	- Authorize & approve project - Provide guidance during initial pilot sessions. - Approve budget - Resolve issues.	Lisa Haen
Strategic Planning Committee	Work with Sponsor and project team to integrate Speakers Lab into NSA-WI chapter structure once pilot phase is complete	NSA-WI Board
Team - Pilot Session Members	- Participate in team meetings & discussions. - Present material and provide feedback on presentations - Provide feedback on the Speakers Lab event itself (timing, process, development, etc.	Jim Schneider, Cheri Neal, Krista Sobieski, Chad Lawson, Ruth Lawson, Kirsty Blattner, John Nepper,

Role	Responsibilities	Contact Person
Project Manager 1 (Pilot Session Pilot)	- Coordinate team activities. - Project planning - Monitor project progress. - Resolve issues - Report project progress to the Sponsor - Communicate issues to the Sponsor - Develop Program Materials	Jacy Imilkowski
Project Manger 2 (Pilot Session Co-Pilot)	- Coordinate team activities - Project planning - Monitor project progress - Develop Program Materials	Roger Wolkoff

PROJECT RISKS

The following overall project risks have been identified. The risks are classified into categories:

- **Logistical risks**: Are those risks that exist as result of the nature and characteristics of business itself, or the risks that arise due to the limited resources of the organization.
- **Technical risks**: Are created due to the complexity of technology being used, or due to the system operations.
- **Experiential risks**: Are risks that come from within the business organization. They are the result of structure or culture of the organization itself.
- **Ethics risks**: Are related to the factors outside of the business organization.

The impact of each risk on the project is analyzed and a mitigation strategy is developed to minimize the potential negative impact of risks on the successful completion of the project.

(See next page for table of risks)

Risk Type	Probability	Risk	Impact on Speaker	Suggested Mitigations
Technical	High	Video equipment not available for a meeting	• Lost learning opportunity for watching feedback later	• Attendee record on phone • Attendee serve as note taker to capture feedback • NSA-WI Invest in audio/video capture technology • Presenter required to bring own video equipment.
Logistics	Low	Location not available for lab	• Not able to present	• Have remote backup (Zoom, etc.) available if needed)
Logistics	Med	Low attendance	• No one to give feedback	• Have Speaker lab calendar • Add to Events calendar • Incentive – every attendance is entry into a drawing for free meeting • Have registration process o Use existing NSA-WI registration functionality
Logistics	Med	Registered Attendee no-Show	• Fewer persons for feedback • If no-show was a speaker, it may prevent someone else from using that time	• Have a back-up presenter registration. • Charge a registration fee for session (or annual registration fee) • Negative consequence for no-show (i.e. can't present in Speakers Lab for 6 months after 2 no-shows).
Logistics	High	Geographic hardship	• Speakers may not be able to attend sessions as often as desired (for both presentation and sharing of feedback to others.	• Have meetings in different locations in state (Madison, Milwaukee, Fox Valley, LaCrosse) • Leverage video conferencing technology (Zoom, GoToMeeting, etc.) • Let speaker send in videos for review and feedback. Capture in writing and send to speaker

Risk Type	Probability	Risk	Impact on Speaker	Suggested Mitigations
Experiential	low	Speaker feels hurt/upset/harassed	• Weakens community bond • Lessens trust • Lessens trust in NSA-WI and Speakers Lab	• Have a facilitator for every meeting. • Create to explain how feedback works • Require attendees read the NSA-AZ article on feedback • Create a feedback structure that goes to the board, should someone have an issue
Ethics	low	Video shared publically without permission	• Speaker may not want footage shared • Impact on professional image (ex: unpolished content, casual comments not intended for professional consumption) • Lessens trust in NSA-WI and Speakers Lab	• Attendees sign Speakers Lab agreement (which includes National Ethics) • Video is only released to the speaker, speaker may distribute from there.
Technical		Access to and storage of video	• Nowhere to store video • Security of video	• Choose a single video storage process for all material (YouTube, Drive, Dropbox) • Board direction requested on direction security requirements
Technical	Med	Lack of knowledge of how to operate video equipment	• Unable to capture video	• Have speaker bring their own video equipment. • Have NSA-WI supply equipment with user guide

PROJECT CONSIDERATIONS

The following project considerations and questions are presented for review by the Board:
1. Supplies
   a. Will there be a "box" that has forms, facilitator guide, etc. that needs to be toted?
      i. If there is a box how will the facilitator access it?
   b. Who will pay for printing of forms?

2. Meeting Facilitation
   a. Will every meeting have and facilitator?
   b. Who will be trained as facilitators?
   c. Who will choose/train facilitators?

3. Video
   a. Who will supply video equipment? Speaker, Facilitator or NSA-WI?
   b. Will NSA-WI invest in video equipment for Speakers Lab?
      i. If so, how will the facilitator get that equipment?
   c. Who will run video?
   d. Should there be a shared video repository for those that want to share their learning with the group?
      i. Where will it be?
      ii. How will it be protected from public or unwanted views?

4. Attendance
   a. To ensure attendance to sessions (i.e. prevent someone from signing up then not showing up, thus impacting the rest of the attendees), should there be a fee (either per session or annual)?
      i. Suggestion from pilot group was a $25 annual fee to join the lab group, to help pay for supplies and put their skin in the game.
   b. What are the repercussions for habitual no-shows?
      i. Dis-allowed from speaking for "X" months?
   c. Will NSA-WI reach out to professional membership to invite Guest Evaluators to sessions?

5. Registration
   a. Will registration be done through NSA-WI site?
      i. If so, will it be flexible so attendee can "un-register" and open their space up to another attendee if they cannot attend?
   b. Should Academy members be given priority registration?
      i. Example: Only Academy members can register until "X" weeks prior to the Lab. After that Professional members may register as well.

6. Location
   a. Can Speakers Labs be held in different geographic locations (Milwaukee, LaCrosse, Wausau, etc.)?

b. Can Speakers Labs be held remotely via Zoom/Skype/etc.?
c. If someone cannot attend due to geography, can they send a video for the audience to watch and provide feedback on?

7. Academy Integration
    a. Would NSA-WI like to leverage a session or two of speaker lab as a dedicated Academy sessions for academy development?
    b. Could/should this replace the Academy Platform Eloquence session?
    c. Can this be done while ensuring that Academy members are being served?

8. Board Sponsorship
    a. Will Speakers Lab be included under one of the board area's responsibilities (membership, marketing, programs, etc.)?

PROJECT APPROACH

MATERIALS DEVELOPMENT

NSA-AZ shared many materials (checklists, feedback forms, processes) for and information about developing a Speakers Lab. Jacy has received permission from NSA-AZ to adapt these materials to WI. NSA-AZ is to be credited on any adapted materials.

NSA-WI will develop new materials (Facilitator's guide, etc.) as needed.

CHANGE CONTROL PROCEDURE

Any scope change to the project should be recommended with appropriate justifications. The change request should be made to Strategic Planning Committee for approval.