



# PLANNING AND IMPLEMENTING

LEVEL 3 PROJECT





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# INTRODUCTION

A structured plan brings objectives into focus. A plan gives team members an understanding of a project and the necessary steps toward completion. Planning and implementation skills are useful as you work toward goals in both your personal and professional life.

In this project, you will learn to develop realistic plans to meet your objectives, identify the necessary resources, and successfully monitor a project to completion.

## YOUR ASSIGNMENT

**For all assignment details and requirements, review the Project Checklist on page 12.**

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**Purpose:** The purpose of this project is to practice developing a plan and bringing that plan to fruition.

**Overview:** Select any small-scale project, such as a family party, a short trip, a themed Toastmasters meeting, or any other event or project that requires planning. Develop and implement the plan, with or without help from others. At a club meeting, deliver a 2- to 3-minute report or a 5- to 7-minute speech about your experience. Submit the Project Completion Form on page 25 to your vice president education to confirm you completed all planning resources.

Throughout this project you will see icons in the margins next to the text. These icons indicate additional resources available online.



**Video:** Sign in to Base Camp to watch a video that supports this project.



**Interactive Activity:** Sign in to Base Camp to complete an interactive activity.



**Resource:** Sign in to Base Camp to view this resource online.

# ASSESS YOUR SKILLS

Evaluate your current skill level by rating each statement.



Select the appropriate number based on your skills today:

**5**  
EXEMPLARY

**4**  
EXCEL

**3**  
ACCOMPLISHED

**2**  
EMERGING

**1**  
DEVELOPING

Pre-Project					Statement	Post-Project				
5	4	3	2	1	I am able to set and achieve clear goals.	5	4	3	2	1
5	4	3	2	1	I am able to take stock of necessary resources.	5	4	3	2	1
5	4	3	2	1	I am able to create an effective project schedule.	5	4	3	2	1
5	4	3	2	1	I am able to identify potential risks.	5	4	3	2	1
5	4	3	2	1	I am able to delegate tasks accordingly.	5	4	3	2	1
5	4	3	2	1	I recognize how this project applies to my life outside of Toastmasters.	5	4	3	2	1

# COMPETENCIES

**The following is a list of competencies that you will learn and practice in this project.**

- Integrate clear, concise goals into your plan.
- Establish a process for meeting milestones during the implementation of your plan.
- Identify resources you have or that are needed.
- Create a schedule to complete a project on time.
- Delegate tasks to the most capable team members.



# PROJECT INITIATION

At the onset of a project, fully define what needs to be accomplished and whom the project affects.

## IDENTIFY STAKEHOLDERS

Internal stakeholders include teammates, project leads, volunteers, or anyone whom the project affects directly. External stakeholders are those who do not work on your project, but are affected in some way, such as vendors or the community.

## SET CLEAR OBJECTIVES

Setting a clear objective for the project ensures that you create a viable schedule and keep your project on track.

For example, your objective is to redesign your club's website. Some goals for this project objective include holding a brainstorming session to generate at least five design ideas and setting a due date for a rough draft.

## DEFINE THE SCOPE

The scope of a project defines and describes exactly what work is involved in the project. This provides your team with a frame of reference so that everyone knows they're working toward the same outcome. The scope of the work may be formal and in writing, as in the case of working with a vendor. The project scope outlines when specific components of the project must be completed (these may be called milestones), as well as the budget and final product or outcome.

For example, you are working with a vendor to produce 100 copies of a 10-page booklet. You wouldn't pay the vendor her price without agreeing exactly what she is to do and when the finished product must be delivered to you. You agree that the booklet will be printed in black and white to keep costs down; therefore, color printing is outside the scope of this project.

# PROJECT PLANNING

## Outline a Plan

A good plan outlines for everyone involved how a project will be completed.

## Define Project Tasks

Assess the steps you must take in order to accomplish each goal and create a task list. Clearly define each task.

## Estimate Completion Time

Estimate how long each task will take and the resources needed to complete them. Estimating the time required to accomplish each of the tasks will help you create a manageable project schedule. Add extra time in your plan to account for the unexpected.

## Manage Dependencies

A dependency is an action or activity that cannot be done until another action is completed. For example, a dependency for an event would include an estimate of attendance. Estimating attendance will help determine the number of handouts you will need to assure your planned space will accommodate all your attendees.

## Set a Schedule

To create a project schedule, draft a rough timeline and establish milestones. Milestones mark the completion of a project phase. A milestone corresponds to an agreed-upon date for completing a project goal.

## Identify Milestones

Identify milestones that are meaningful and achievable. A milestone for the project of updating your club's website might be the approval of a rough draft of new content.

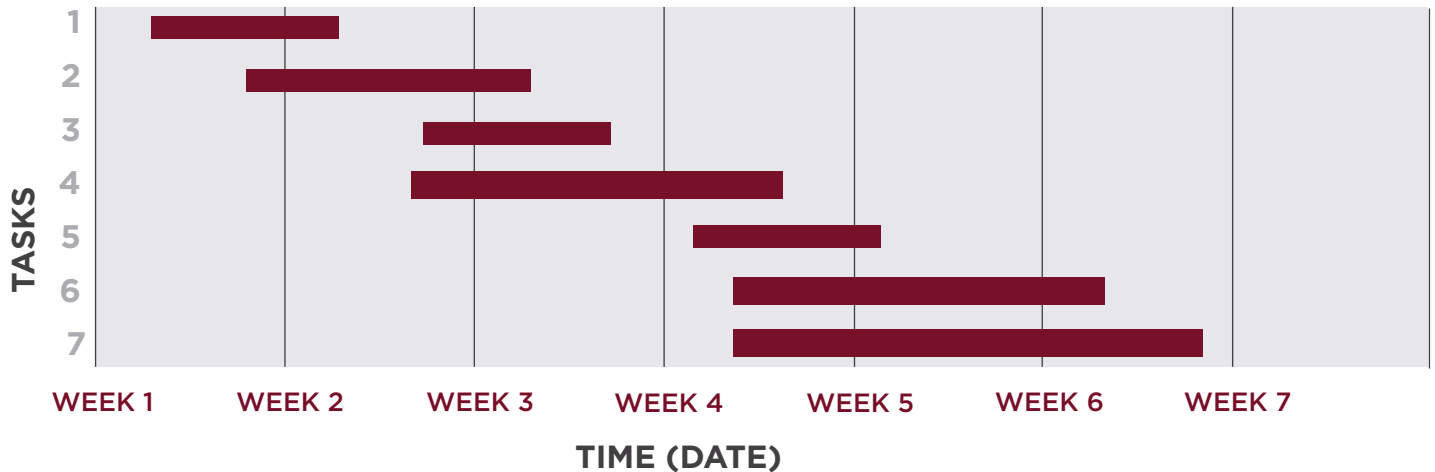


Use the Project Plan on page 17 to develop your plan.



## USE A GANTT CHART

You can plan your schedule by utilizing a Gantt chart. A Gantt chart is a graphical representation of the project tasks and milestones presented on a timeline. Each task is assigned an estimated completion date. The chart shows how each task affects the completion of other tasks.



## PLANNING BEST PRACTICES

- Identify the resources—materials, people, and budget—required to accomplish your plan. Once you identify what you have, determine how to acquire any missing resources.
- If you need to create a budget, identify and estimate the expenses you expect to incur. To avoid unexpected expenses, anticipate as many as you can.
- Project management software offers a variety of tools and features, such as file sharing, message boards, and time tracking. It usually has a to-do list or task features, as well as calendars for tracking milestones.
- Anything that might impede the project schedule is a risk. Create a list of possible risks and plan a response for each so that you are prepared to handle them if they occur.



# PROJECT IMPLEMENTATION

The implementation phase of a project is when you put your plan into action.

## ASSEMBLE YOUR TEAM

Based upon your resource planning, assemble a project team capable of fulfilling your objectives. Look for members who possess the skills required to complete the project and who will actively contribute to the team.

- Find willing participants with shared values and goals
- Build strong working relationships
- Share your plan or form your plan with the team

## DELEGATE TASKS

Delegation is the assignment of a task or tasks to other team members. One of the roles of a team leader is to delegate tasks to ensure you meet milestones. Assign tasks, when possible, based on the team members' interests, expertise, and availability. The better you know your team, the better you can assess their strengths.

## CREATE A COMMUNICATION PLAN

A communication plan helps you consider your audience, clarify your goals, and determine how to relay your messages to them.

To create a communication plan, take the actions described. Consider your project team and other stakeholders when developing your plan. Define how you will communicate updates to your team and keep stakeholders well informed.

- Identify your target audience.
- Determine the most effective way to distribute your message.
- Outline your message using the proper tone for each audience and distribution method.

# PROJECT MONITORING

Keep your team apprised of any changes or updates. As tasks are completed, have a system in place for tracking and notifying others so that all team members know the status of the project.

## TRACK PROGRESS COMPARED TO PLAN

Assess your progress and make adjustments as necessary.

## COMMUNICATE PROGRESS

Communicate with team members to make sure they are clear on their tasks and that deadlines are manageable.

External stakeholders may not be interested in the execution of each individual task. Instead, report on milestones and provide regular project updates.

Use the Event Planning Worksheet on page 20 to track resources, tasks, and goals for your project or event.



## REVIEW AND APPLY

Before you complete the assignment, take a moment to read through the questions you see here. If you are not able to answer them comfortably, review the project.

- What are the best steps to take when setting goals?
- List the steps you will take to set up milestones in your plan.
- What is the value of a clearly defined schedule?
- What resources do you have? What do you need?
- When delegating, what strategies will you use to identify the best team member for each task?



# COMPLETE YOUR ASSIGNMENT

Now that you have read through the project, plan and prepare your speech or report.

**Review:** Return to page 2 to review your assignment.

**Organize:** Use the Project Checklist on page 12 to review the steps and add your own. This will help you organize and prepare your assignment.



**Schedule:** Work with the vice president education to schedule your speech.

**Prepare:** Prepare for your evaluation. Review the evaluation resources on pages 14–16 and share all resources with your evaluator before your speech. You may choose to share your evaluation resources online.



# PROJECT CHECKLIST

## Planning and Implementing

**Purpose:** The purpose of this project is to practice developing a plan and bringing that plan to fruition.

**Overview:** Select any small-scale project, such as a family party, a short trip, a themed Toastmasters meeting, or any other event or project that requires planning. Develop and implement the plan, with or without help from others. At a club meeting, deliver a 2- to 3-minute report or a 5- to 7-minute speech about your experience. Submit the Project Completion Form on page 25 to your vice president education to confirm you completed all planning resources.

**This project includes:**

- Developing and implementing a plan for a small-scale project
- The Project Plan resource
- The Event Planning Worksheet
- The Project Completion Form
- A 2- to 3-minute report or 5- to 7-minute speech

Below are tasks you will need to complete for this project. Please remember, your project is unique to you. You may alter the following list to incorporate any other tasks necessary for your project.

Create a plan to accomplish a small-scale project of your choosing.

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Review your project plan with a mentor or other leader.

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If you are working with a team, build your team.

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Review your project plan with your team.

---

---

Implement your plan.

---

---

Schedule your report or speech with the vice president education.

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---

Write your report or speech.

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Rehearse your report or speech.

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Submit your signed Project Completion Form to the vice president education.

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After you have completed all components of the assignment, including your report or speech, return to page 3 to rate your skills in the post-project section.

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# EVALUATION FORM

## Planning and Implementing

Member Name \_\_\_\_\_ Date \_\_\_\_\_

Evaluator \_\_\_\_\_ **Speech Length:** 2 – 3 minutes or  
5 – 7 minutes

**Speech Title** \_\_\_\_\_

### Purpose Statements

- The purpose of this project is for the member to practice developing a plan and bringing that plan to fruition.
- The purpose of this speech is for the member to share some aspect of planning and implementing his or her small-scale project.

### Notes for the Evaluator

The member completing this project has spent time developing and implementing a plan for a small-scale project.

About this speech:

- The member will deliver a well-organized speech about some aspect of his or her experience.
- The speech may be humorous, informational, or any style the member chooses.
- The speech should not be a report on the content of the “Planning and Implementing” project.

### General Comments

You excelled at:

You may want to work on:

To challenge yourself:



For the evaluator: In addition to your verbal evaluation, please complete this form.

5 EXEMPLARY	4 EXCELS	3 ACCOMPLISHED	2 EMERGING	1 DEVELOPING	
<b>Clarity:</b> Spoken language is clear and is easily understood					Comment:
5	4	3	2	1	
<b>Vocal Variety:</b> Uses tone, speed, and volume as tools					Comment:
5	4	3	2	1	
<b>Eye Contact:</b> Effectively uses eye contact to engage audience					Comment:
5	4	3	2	1	
<b>Gestures:</b> Uses physical gestures effectively					Comment:
5	4	3	2	1	
<b>Audience Awareness:</b> Demonstrates awareness of audience engagement and needs					Comment:
5	4	3	2	1	
<b>Comfort Level:</b> Appears comfortable with the audience					Comment:
5	4	3	2	1	
<b>Interest:</b> Engages audience with interesting, well-constructed content					Comment:
5	4	3	2	1	
<b>Topic:</b> Shares some aspect of the planning or implementing process of his or her small-scale project					Comment:
5	4	3	2	1	

# EVALUATION CRITERIA

## Planning and Implementing

This criteria lists the specific goals and expectations for the speech. Please review each level to help you complete the evaluation.

### Clarity

- 5 – Is an exemplary public speaker who is always understood
- 4 – Excels at communicating using the spoken word
- 3 – Spoken language is clear and is easily understood
- 2 – Spoken language is somewhat unclear or challenging to understand
- 1 – Spoken language is unclear or not easily understood

### Vocal Variety

- 5 – Uses the tools of tone, speed, and volume to perfection
- 4 – Excels at using tone, speed, and volume as tools
- 3 – Uses tone, speed, and volume as tools
- 2 – Use of tone, speed, and volume requires further practice
- 1 – Ineffective use of tone, speed, and volume

### Eye Contact

- 5 – Uses eye contact to convey emotion and elicit response
- 4 – Uses eye contact to gauge audience reaction and response
- 3 – Effectively uses eye contact to engage audience
- 2 – Eye contact with audience needs improvement
- 1 – Makes little or no eye contact with audience

### Gestures

- 5 – Fully integrates physical gestures with content to deliver an exemplary speech
- 4 – Uses physical gestures as a tool to enhance speech
- 3 – Uses physical gestures effectively
- 2 – Uses somewhat distracting or limited gestures
- 1 – Uses very distracting gestures or no gestures

### Audience Awareness

- 5 – Engages audience completely and anticipates audience needs
- 4 – Is fully aware of audience engagement/needs and responds effectively

- 3 – Demonstrates awareness of audience engagement and needs
- 2 – Audience engagement or awareness of audience requires further practice
- 1 – Makes little or no attempt to engage audience or meet audience needs

### Comfort Level

- 5 – Appears completely self-assured with the audience
- 4 – Appears fully at ease with the audience
- 3 – Appears comfortable with the audience
- 2 – Appears uncomfortable with the audience
- 1 – Appears highly uncomfortable with the audience

### Interest

- 5 – Fully engages audience with exemplary, well-constructed content
- 4 – Engages audience with highly compelling, well-constructed content
- 3 – Engages audience with interesting, well-constructed content
- 2 – Content is interesting but not well-constructed or is well-constructed but not interesting
- 1 – Content is neither interesting nor well-constructed

### Topic

- 5 – Delivers exemplary speech about some aspect of the planning or implementing process of his or her small-scale project
- 4 – Delivers excellent speech about some aspect of the planning or implementing process of his or her small-scale project
- 3 – Shares some aspect of the planning or implementing process of his or her small-scale project
- 2 – Mentions some aspect of the planning or implementing process of his or her small-scale project, but does not fully address
- 1 – Delivers a speech on a topic other than some aspect of the planning or implementing process of his or her small-scale project

# PROJECT PLAN

## Project Plan

Project	
Purpose	
Resources	
Budget	
Key Deliverables	
Milestones	
Notes	

### Project Team

<b>Project Manager</b>	
------------------------	--

<b>Team Member</b>	
--------------------	--

Delegated Task	
Milestones	
Deadline	
Contact Information	

<b>Team Member</b>	
--------------------	--

Delegated Task	
Milestones	
Deadline	
Contact Information	

Team Member	
Delegated Task	
Milestones	
Deadline	
Contact Information	

Team Member	
Delegated Task	
Milestones	
Deadline	
Contact Information	

# EVENT PLANNING WORKSHEET

Use this form to assist you in planning your event.

## Name of Event

Location \_\_\_\_\_ Date/Time \_\_\_\_\_

Objective \_\_\_\_\_

## Venue

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Space rental							
Security deposit							
Insurance							
Parking/transportation							
Other							

## Marketing and Registration

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Invitation design							
Invitation printing							
Website							

**Marketing and Registration** (continued)

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Advertisement							
RSVPs							
Other							

**Catering**

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Meals							
Beverages							
Servers needed							
Table skirting							
Chair covers							
Other							

**Audio/Visual**

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Microphones							
Screens							
Projectors							

**Audio/Visual (continued)**

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Internet access							
Other							

**Rental Items**

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Tents							
Stage							
Tables							
Podium							
Other							

**Décor**

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Lighting							
Signage							
Flowers							
Table skirting							
Other							



### Entertainment

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Musicians							
Speakers							
Other							

### Planning and Organizing

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Office space							
Office supplies							
Communication costs							
Travel expenses							
Other							

### Administrative Costs

Item Description	Vendor Contact	Assigned to	Start Date	Due Date	Dependency	Budgeted Amount	Status
Accounting							
Legal							
Staffing							
Other							



# PROJECT COMPLETION FORM

I completed all components of my "Planning and Implementing" project, including the Project Plan resource and Event Planning Worksheet.

Member Name \_\_\_\_\_

Member Signature \_\_\_\_\_ Date \_\_\_\_\_



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