ALASKA MAJESTIC LODGE PROJECT

By

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A

PROJECT

Presented to the Faculty

of the University of Alaska Anchorage

in Partial Fulfillment of the Requirements

for the Degree of

MASTER OF SCIENCE

By

Kelvin Goode, B.S.

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Abstract

The Alaska Majestic Lodge Project proposed to deliver a remote wilderness fishing lodge business plan. The project proposal was derived from a business opportunity that entailed capitalizing on a niche in a sport fishing market in the Becharof National Wildlife Refuge. When in operation, the business is expected to be the only 100% Alaskan Native owned lodge in the region and shall provide services for up to two hundred people seasonally from May to October.

The significance of the project can be demonstrated in reviewing the summer visitor year of 2011. Nearly 1.2 million Alaskan tourists spent an estimated $1.5 billion in the State. In 2013 the visitor volume increased to 1.96 million people, with a rise in spending to about $1.82 billion. Southwest Alaska received nearly $93 million in the summer of 2014.

The journey to capture the opportunity has shown that there is a forecasted net profit of fifty-five percent with a return on the investment of four years, assuming the lodge meets sixty percent capacity. The process undertaken to perform industry and market research allowed for the furnishing of steps necessary to deliver a business plan that incorporated the uniqueness of the business, the profitability of it and the opportunity for guests to see the region through the eyes of its indigenous people.

Key Terms

Business Planning, Project Management, Entrepreneurship, Market Analysis, Bristol Bay Tourism, Alaskan Wilderness Lodge, Alaskan Vacation, Alaska Visitor Statistics, Sport Fishing Alaska, Eco-tourism, Geo-tourism, Adventure tourism

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Glossary

Baseline	A minimum or starting point used for comparisons.
Business Plan	A written document that describes in detail how a new business is going to achieve its goals.
Capability	A capability is a specific competency that must exist in an organization in order for it to execute project management processes and deliver project management services and products.
Interview	A formal or informal approach to elicit information from stakeholder by talking to them directly.
Remote Lodge	A resort hotel that is not accessible via road system.
Lessons Learned	The knowledge gained during a project which shows how project events were addressed or should be addressed in the future with the purpose of improving future performance.
Market Research	The process of gathering information at conferences, online reviews, and a variety of sources to identify market capabilities.
Product	An artifact that is produced, is quantifiable, and can be either an end item in itself or a component item.
Project	A temporary endeavor undertaken to create a unique product, service or result.
Project Management Plan	The document that describes how the project will be executed, monitored and controlled.
Outcome	The tangible or intangible result of applying a capability.
Risk Acceptance	A risk response strategy whereby the project team decides to acknowledge the risk and not take any action unless the risk occurs.
Risk Avoidance	A risk response strategy whereby the project team acts to eliminate the threat or protect the project from its impact.
Risk Mitigation	A risk response strategy whereby the project team acts to reduce the probability of occurrence or impact of a risk.
Risk Transference	A risk response strategy whereby the project team shifts the impact of a threat to a third party, together with ownership of the response.
Stakeholder	An individual, group, or organization who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.
SWOT Analysis	Analysis of strengths, weaknesses, opportunities, and threats of an organization, project or option.
Subject Matter Expert	A person who is an authority in a particular area or topic.

Introduction

Background

The genesis of this product related research project was inspired by the magic that lives in the Becharof Lake region. The sponsors and primary researcher are indigenous peoples of the Alaskan Peninsula. The region, considered sacred to the local people, is comprised of pristine wilderness, tradition and majesty unparalleled. It is here where the highest of values held dear by the people dwell within every root, stream, mountain and creature. The Alaska Majestic Lodge (AML) Project was proposed to capitalize on the opportunity to showcase the beauty and magnificence of the region, to generate profit, and to give back.

Small business is the number one economic driver for the United States gross domestic product (GDP). (U.S. Census, 2014) Choosing to enter the business market offered the widest range of opportunity for the philanthropic and profit minded sponsors. The remote wilderness lodging industry was selected because a market already exists on the Alaskan Peninsula. Most lodges are secluded and offer services that range from sport fishing to wildlife viewing. Research conducted was intended to capture high level market analysis, analyze local competition and deliver the business plan to successfully infiltrate the wilderness lodging industry in the Becharof Lake region. The literature sources used to produce this report can be found in the Literature Review and References section.

Research Question to keep in Mind

Can the requirements to initiate and operate a remote fishing lodge in southwest Alaska be planned, measured and approved using project management methodologies? A project is defined as a temporary endeavor undertaken to produce a unique product, service or result. Developing and delivering the proposed business plan qualified as a project and was thus pursued for further research. As a large emphasis of the project utilized project management methods in delivering the business plan it was confirmed that project management methods positively impacted the delivery of the product in terms of scope and time.

Project Scope and Objectives

The project scope shall deliver a 100% completed business plan no later than November 27, 2015. The AML project management plan shall consult of and incorporate Project Management Institute (PMI) methodologies throughout the project lifecycle.

The objective of the project was to contribute back to the body of knowledge through the means and methods used to deliver the business plan. The project manager's strategy included: researching other operations similar, researching economic viability, incorporating sponsor and personal experience, and iterative consultations with subject matter experts.

For the Reader

Keep the following questions in mind through the report:

• Where can the research presented in this report be applied outside the remote wilderness lodge industry?

• What value is this project contributing to the body of knowledge?

Literature Review

The literature review was purposed to provide a background on the Alaskan tourism industry for wilderness lodges and any information that may pertain to designing a business plan. To better understand business planning required a review of the industry, company types, existing market and sales, operations, management and ownership, critical risks, and financial management. The literature selected for review was chosen based on its merit and the credibility of the author and publisher. Authors were backed by publishers whom ranged from the State of Alaska to the World Wild Life Foundation. A complete list of the sources consulted can be found in the References section.

The information that the literature below conveyed was the information necessary to successfully investigate the remote wilderness lodging industry and deliver a business plan to capture a section of the remote wilderness lodging market for the Becharof region. The literature below aided in understanding the qualities necessary to successfully deliver a business plan focused in the wilderness lodging industry by way of helping to furnish the importance of the research questions, research methods, and analysis strategies.

Literature sources reviewed included:

A Guide to the Project Managmenet Body of Knowledge (PMBOK Guide) 5th Ed., Project Management Institute, Inc., 2013
A Profile of Visitors to Rural Alaska | Alaska Travelers Surve, McDowell Group, 2006
Alaska Visitor Statistics Program, McDowell Group, 2008-2014
Birding Tourism for Western Alaska, Gorman, 2013
Economic Assessment of Bristol Bay Area: National Wildlife Refuges Alaska Peninsula/Becharof Izembek Togiak, Goldsmith, Hall, Hill, 1998
How to Write a Business Plan, Pinson, Jinnet, 1993
Monitoring Visitor Use and Associated Impacts in the Southwest Alaska Network Park, Monz, C.A., 2005
Organizational Project Management Maturity Model (OPM3) 2nd Ed., Project Management Institute, 2008
Rich Dad Poor Dad, Kiyosaki, 1997
Steps to Success for Rural Entrepreneurs: Strarting an Ecotoursim Business in Alaska, Johnson, T.L., 2008
Steps to Success for Rural Entrepreneur: Writing Your Small Business Plan, Bell, Ketchum, Humphries, 2008
Steps to Success for Rural Entrepreneurs: Starting a Rural Alaska Lodge, Bell, Ketchum, Humphries, 2008
Zen Entreprenueurship: Walking the Path of the Career Warrior, Virk, 2013

Research Methods

This project focused on the qualitative approach with quantitative analysis acting as a validation measure. Business related publications were targeted as the primary target content of the research. Other target content included market and economic assessments and project management methods publications. Conducting a literature review and eliciting verbal surveys with subject matter experts were anticipated to yield findings of maximum value with the least amount of effort expensed. The literature review acted as the primary research method due to the availability of published data on the research topic. The interviews were intended to gather local market data and to validate assumptions and data gathered through the literature review. Research topics included:

Literature Search
- Industry research, search of statistics for the proposed business's industry
- Requirements Identification and Analysis for business planning and project management planning
- Research of similar businesses, operation & services offered
- Research of funding agencies for low income minority owned businesses and programs similar
- Project management tools and templates (project charter, procurement plan, other tools etc.)
- Business plan outlines
- Risks and Rewards

Verbal Survey Interviews with subject matter experts
- Logistics assessment

- Costs assessment
- Risk & Risk Response assessment
- Schedule assessment/Work Break Down Structure
- Scope assessment
- Regulatory assessment
- Operations assessment

Assumptions
- Future tourism revenues for sport fishing and tourism in southwest Alaska do not decline.
- Valid business planning information is available in all categories of information searches.

Constraints
- Business Plan submission deadline of November 20th, 2015.

Research Participants

Brett & Lucy Goode were the project sponsors with Kelvin Goode being the primary researcher, herein known as the project manager (PM).

Three advisors to the PM were also recruited to provide expertise when needed. They were: Jim Bates (Member, Advisory Committee), Roger Hull (Chair, Advisory Committee), and LuAnn Piccard (Chair, ESPM Department).

Seven survey participants, five of whom were wilderness lodges located in the region of the proposed business location, and two that were outside the region.

When soliciting responses from stakeholders, four communication strategies were incorporated into the interviewing techniques:

1. Listen
2. Understand
3. Clarify Stakeholder Needs
4. Implement solutions

A list of interview questions was purposed for conducting interviews with similar businesses in the region. Interview questions were crafted for lodge owners or managers with questions structured so as to no leave room for opinion. The interview questionnaire was intended to draw information from the interview participant's business related experience and not opinion grounded information. Five lodges in the region, listed as immediate competition, were selected as potential interview candidates. The selection being based on the similarity in services offered and nearness in proximity to AML's proposed location. The Interview Protocol document and the Informed Consent document can be found in Appendix C and Appendix D.

Results

During the project's infancy, an assumption that ample information in the business planning arena would be available in all categorical searches proved to be correct. Business related findings retrieved from the literature searches were collected and cataloged into the following areas:

- Boating Requirements
- Branding
- Business Start-Up Research
- Do it yourself (DIY) information
- Economic Assessments and Market Research
- Family History and Region Research
- Guide Training
- Infrastructure Related

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- License and Permitting Requirements
- State Requirements

The findings above aided in crafting the interview questions and contributed to the repository of electronic publications gathered throughout the research period. The information gathered above was generated by credible publishers such as: the State of Alaska, the Small Business Administration, private corporations, accredited educational institutions, and private authors. Refer to Appendix C for more information regarding the interview questions generated from the literature review.

Business Planning Research

The findings of the business planning research yielded business planning frameworks. In the 2008 report, Bell, Ketchum, and Humphries business plan outline, *Steps to Success for Rural Entrepreneur: Writing Your Small Business Plan* noted five success factors are identified that contribute to successfully starting and operating a business:

1. Identify a real business opportunity
2. Stay focused
3. Build the right team
4. Provide excellent customer service
5. Develop a solid business plan

It was also stated the following outline lists the key sections of a typical business plan: (pp. 12)
1. Executive Summary
2. Business Description
3. Industry Overview
4. Market Analysis
5. Competitive Analysis
6. Marketing Strategy
7. Ownership, Staffing, and Management Plan
8. Financial Plan
9. Implementation Summary
10. Concluding Comments
11. Appendices
    a. Estimated start-up costs worksheet
    b. Estimated revenue worksheet
    c. Estimated fixed costs worksheet
    d. Profit and loss statement
    e. Cash flow statement

Know The Product
The outline above is similar to the business plan outline selected for use. "The better you can explain the features that distinguish your lodge from other lodging, the better you will be at attracting guests." (Bell, Ketchum, & Humphries, Steps to Success for Rural Entrepreneurs: Starting a Rural Alaska Lodge, 2008) The above information best orchestrated how to develop the business plan outline or framework.

Alaskan Tourism Industry

Tourist volume statistics for the State of Alaska were gathered from the Alaska Visitor Statistics Program. The Alaska Visitor Statistics Program is a State of Alaska Department of Commerce, Community and Economic Development program that monitors and surveys sample populations of the tourists that visit Alaska. Visitor data has been published annually since 2008. This database allowed for a deep-dive assessment of where visitor volumes travel, how much money is spent, and what the most enjoyed and least enjoyed activities were during the visitation.

Between 2012 and 2014 a seven percent increase in tourist volume was realized in southwest Alaska. (Group, McDowell, 2013-2014) The increase in volume contributed an additional $4 million to the visitor industry spending

impact. As the majority of villages in rural southwest Alaska do not possess the infrastructure to support tourism, the economic impact was experienced in the rural lodging industry.

Chart 1. Total Visitor Industry-Related Employment in Alaska, 2013-14

Exhibit I – Chart 1. Taken from (Group, McDowell , 2012-2013)

Table 3. Visitor Industry Economic Impacts by Region, 2011-12, 2012-13, and 2013-14

	2011-12 Impacts	2012-13 Impacts	2013-14 Impacts
Total Visitor Industry Spending	**$3.72 billion**	**$3.93 billion**	**$3.92 billion**
Southcentral	$1.97 billion	$2.05 billion	$2.06 billion
Southeast	$1.00 billion	$1.10 billion	$1.09 billion
Interior	$605 million	$631 million	$626 million
Southwest	$116 million	$120 million	$121 million
Far North	$29 million	$30 million	$30 million
Total Employment Impacts	**37,800 jobs**	**39,000 jobs**	**38,700 jobs**
Southcentral	18,900 jobs	19,200 jobs	19,200 jobs
Southeast	10,200 jobs	10,900 jobs	10,800 jobs
Interior	7,000 jobs	7,100 jobs	6,900 jobs
Southwest	1,400 jobs	1,500 jobs	1,500 jobs
Far North	300 jobs	300 jobs	300 jobs
Total Labor Income Impacts	**$1.24 billion**	**$1.32 billion**	**$1.31 billion**
Southcentral	$580 million	$601 million	$604 million
Southeast	$370 million	$407 million	$405 million
Interior	$240 million	$251 million	$246 million
Southwest	$42 million	$44 million	$44 million
Far North	$11 million	$12 million	$12 million

Note: Columns may not add to totals due to rounding.

Exhibit II – Table 3 taken from (Group, McDowell , 2013-2014)

Exhibit III indicates that an increase in Internet use to reserve and purchase Alaskan vacations. The sudden increase in internet bookings transpired around the time of the technology boom in 2006-2007.
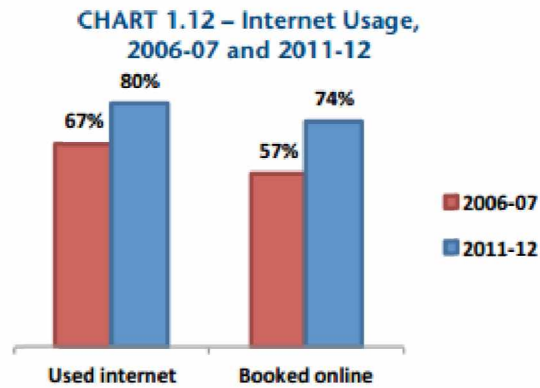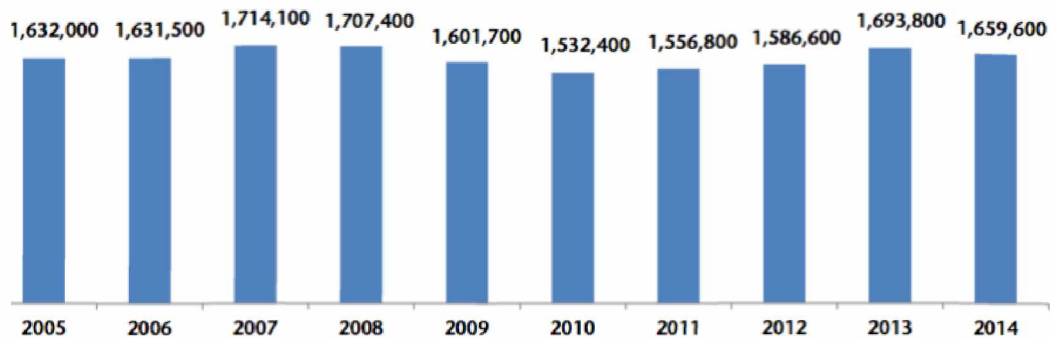
CHART 1.12 – Internet Usage, 2006-07 and 2011-12

Exhibit III – Chart 1.12 taken from (Group, McDowell , 2012-2013)

CHART 4. Summer Visitor Volume to Alaska, 2005-2014

Sources: AVSP V and AVSP VI.

Exhibit IV – Chart 4 taken from (Group, McDowell , 2013-2014)

Observing macro-economic data of the visitor volumes coming to Alaska indicated a steady visitor volume, with a two year delay in the 2008 recession. Four percent of the visitor volume was recorded as traveling to southwest Alaska. (McDowell Group, 2013) Using the data from Exhibit V, it is estimated that a steady trend totaling around 65,000 annual visitors will have visited southwest Alaska since 2005. Assuming that a steady trend continues, as AML matures and the customer portfolio increases a rise in customer reservations will be expected.

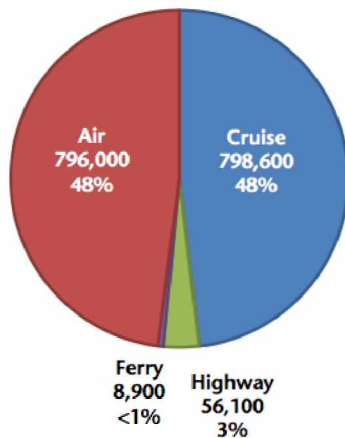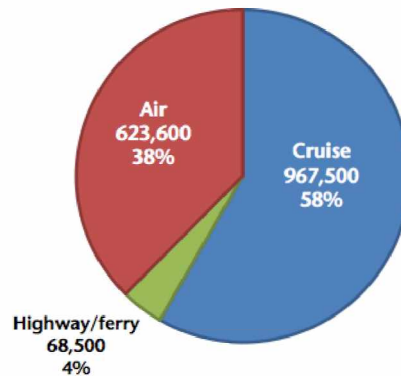## CHART 1. Alaska Visitor Volume, Summer 2014, By Exit Mode

CHART 2. Alaska Visitor Volume, Summer 2014, By Transportation Market

Chart 1: Air 796,000 48%; Cruise 798,600 48%; Ferry 8,900 <1%; Highway 56,100 3%

Chart 2: Air 623,600 38%; Cruise 967,500 58%; Highway/ferry 68,500 4%

Total Estimated Visitors: 1,659,600

Exhibit V – Chart 1&2 taken from (Group, McDowell , 2013-2014)

TABLE 2. Trends in Summer Visitor Volume, By Transportation Market, 2008-2014

	2008	2009	2010	2011	2012	2013	2014
Cruise ship	1,033,100	1,026,600	878,000	883,000	937,000	999,600	967,500
Air	597,200	505,200	578,400	604,500	580,500	619,400	623,600
Highway/ferry	77,100	69,900	76,000	69,300	69,100	74,800	68,500
Total	1,707,400	1,601,700	1,532,400	1,556,800	1,586,600	1,693,800	1,659,600
% change	-0.4%	-6.2%	-4.3%	+1.6%	+1.9%	+6.8%	-2.0%

Sources: AVSP V and AVSP VI.

Exhibit VI – Chart 2 taken from (Group, McDowell , 2013-2014)

Exhibit V and VI indicate that in the summer of 2014 roughly 172,000 visitors traveled to Alaska via the cruise industry and left on a plane. The variance demonstrates that among the three potential "Alaskan travel markets" the top two to advertise are cruise ships and airplanes. Understanding the trends and statistics regarding tourist entrance and exit methods provided the roadmap for where to concentrate brochure and magazine advertising.

Company Overview

Literature viewed:
Steps to Success for Rural Entrepreneurs: Starting a Rural Alaska Lodge, Bell, Ketchum, Humphries, 2008
Steps to Success for Rural Entrepreneurs: Strarting an Ecotoursim Business in Alaska, Johnson, T.L., 2008

The company overview section conveys high level information critical to the company. Knowledge about the company concept, product or service, company target market, company uniqueness, and company structure comprises the company overview. (Herman, 2013). The company concept discusses the background information on location, demographics, economics and the proposed product or service to be marketed.

Determining the company type helped in planning the organizational structure of the business. Exhibit VII from U.S. Census Bureau displays a pie chart of small employer firm legal forms in the U.S. The company type matters as different tax implications vary from business type to business type.
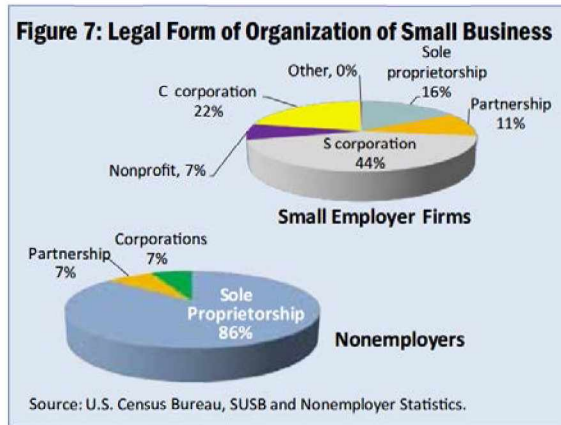
Exhibit VII: Figure 7 taken from (Small Business Administration, 2012)

Market and Sales

Literature Viewed
A Profile of Visitors to Rural Alaska | Alaska Travelers Surve, McDowell Group, 2006
Alaska Visitor Statistics Program, McDowell Group, 2008-2014
Birding Tourism for Western Alaska, Gorman,
Economic Assessment of Bristol Bay Area: National Wildlife Refuges Alaska Peninsula/Becharof Izembek Togiak, Goldsmith, Hall, Hill, 1998
Monitoring Visitor Use and Associated Impacts in the Southwest Alaska Network Park, Monz, C.A., 2005

The sponsors stated that in their preliminary discussions with lodge owners, it was discovered that most lodges only promote face-to-face. It was stated the website and booking sites were used after engaging the potential client.
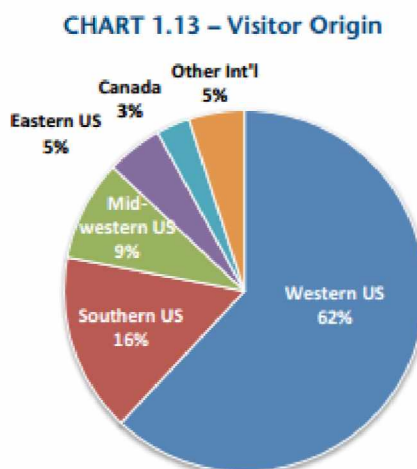
Exhibit VIII – Chart 1.13 taken from (Group, McDowell , 2012-2013)

Exhibit VIII indicates that sixty-two percent of Alaskan visitors originated from Western US. Using this information helped to establish where primary and secondary face-to-face promoting shall take place. The sponsor conducted stakeholder outreach with lodge owners at sports show conventions in Anchorage and yielded indications that similar lodge's customer base are captured via the face-to-face method at sports show conventions.

Listed below are sports show convention locations that will be attended: (The Fly Fishing Show, 2015)

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- Somerset, New Jersey   (Fly Fishing Show)
- Arlington, Texas   (Fly Fishing Show)
- Pleasanton, California   (Fly Fishing Show)
- Pasadena, California   (Fly Fishing Show)

Operations

Research of similar businesses, operation & services offered. Stakeholder discussion with the sponsors was held to identify the services to be offered, the capabilities the company will possess, and any competitive advantages over competition.

Regulation Requirements (Appendix D)
- State Regulations
- Federal Regulations
- Local Regulations
- Licensing Requirement

Management and Ownership

As per the research, lending agencies will likely award funding to a project with an average idea and a great team versus a great project idea with a bad team. (Small Business Administration, 2015) Management and ownership of the company can be viewed in Appendix A.

Table 2: Number of Firms and Receipts by Demographic, 2007

Business Owner Demographic	Firms (millions)	Receipts per firm ($1,000)
All businesses	27.1	1,070
Male	13.9	570
Female	7.8	130
Equally male/female	4.6	240
African-American	1.9	50
Asian	1.6	290
Hispanic	2.3	120
Native American/Pacific Islander	0.3	120
Veteran	3.7	450
Publicly held	0.8	23,860

Source: U.S. Census Bureau, SBO.

Exhibit IX – taken from SBA FAQ Sept 2012

Critical Risks

Identifying and analyzing risk involved several iterative stakeholder discussions with the sponsors. Any risks or corresponding impacts associated with those risks were identified and cataloged in the risk analysis tool. Project Risk Analysis Tool can be found in Appendix G.

Financials

Research of funding agencies for low income minority owned businesses and programs similar were identified.

Rich Dad Poor Dad, Kiyosaki, 1997
There exists over fifteen miles of tax law in the United States. (Kiyosaki, 1997)

A review of the findings from the research above aided in identifying costs of services offered by similar businesses. This list, found below in Exhibit X contributed to the AML pricing strategy.

Stakeholder	Website	Price ($/person) Double Occupancy Room
Tikchik lake lodge	http://www.tikchiklodge.com/travel-information	$ 8,300
Ultima Thule Lodge	http://www.ultimathulelodge.com/rates	$ 7,900
Blue Mountain Lodge	http://www.bluemountainlodge.com/fishing/open-dates-pricing	$ 5,500
Wildman Lake Lodge	http://www.wildmanlodge.com/request.php	$ 7,500
Crystal Creek Lodge	http://www.crystalcreeklodge.com/rates/	$ 10,400
Epic Angling & Adventure, LLC	http://www.epicanglingadventure.com/alaska-wilderness-safari/safari-trip-info/#	$ 6,650
Painter Creek Lodge	http://www.paintercreeklodge.com/rates.php	$ 6,600
Lake Clark Inn	http://www.lakeclark.com/lodge/packages-rates	$ 7,200
Grizzly Skin Lodge	grizskins@att.net	$ 3,900
Tierra Patagonia	http://www.tierrahotels.com/en-us/tierra-patagonia-hotel-boutique-amp-spa/rates.htm	$ 5,100
Average Cost per Week		**$ 6,905**
Median Cost per Week		**$ 6,925**

Exhibit X – Costs of Similar Businesses

A series of assumptions had to be made regarding the estimated costs of goods and services, estimated sales volumes, start-up assets, start-up liabilities, start-up equity were made to produce the cash flow diagram, income statement, and balance sheet. The cash flow diagram, income statement and balance sheet can be found in the business plan appendicies.

Interviews

The timing of the interviews carried the risk of not reaching the proposed interview participant as the interview requests took place during their operating season. Two of the lodges did not furnish responses due to time constraints. Two other lodges stopped the interview after discovering that the project sponsors were considering entering their business arena. The fifth and final lodge owner agreed to talk to, "feel out" what the sponsors' intentions were. The individual stated that most of the information requested was proprietary and backed out of the interview.

In response to the risk realized of not attaining information from similar businesses, the project manager elected to interview a lodge on the road system and a lodge off-grid outside the region of the proposed business location. Out of seven lodges, only one agreed to an impromptu interview. The results of that interview although helpful, did not benefit the project as no consent forms have been returned.

Continual outreach and communication with the sponsors furnished the project requirements, assumptions, constraints and expectations of the end product. The requirements gathering period was composed of several iterative stakeholder engagements sessions with the project sponsors and other pertinent stakeholders.

Analysis

Literature Search
- Industry research, search of statistics for the proposed business's industry
- Requirements Identification and Analysis for business planning and project management planning
- Research of similar businesses, operation & services offered
- Research of funding agencies for low income minority owned businesses and programs similar
- Project management tools and templates (project charter, procurement plan, other tools etc.)
- Business plan outlines
- Risks and responses

Verbal Survey Interviews with subject matter experts
- Logistics assessment
- Costs assessment
- Risk & Risk Response assessment
- Schedule assessment/Work Break Down Structure
- Scope assessment
- Regulatory assessment
- Operations assessment

Analyzing the research gathered validates that the research hypothesis is correct and that a remote wilderness lodge business plan can be generated using project management methodologies. The literature sources selected provided the necessary information to perform analysis and construct a business plan.

Business Planning Research

In review of the results, business planning research through the University of Alaska, State of Alaska, or Small Business Administration can yield business planning templates with steps to aid in delivering quality market and financial analysis.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis		
Project Information		
Project Title: Alaska Majestic Lodge Project	Project Number: 001	
Project Manager: Kelvin Goode		
Section 1: Strengths		
Financially Educated	Humor	Intuitive
Family Oriented	Business Savy	Honesty
Bountiful Land Resources	Unified in Goal	Friendly
Perspective	Culture belongs to region	Quick to learn
Integrity	Creative	Strong work ethic
Innovative	Graditude	Inspired
Section 2: Weaknesses		
Liabilities	Much information to review	Access to land
Small Population	Single human resource for project	Seasonality of the Land
Section 3: Opportunities		
Cultural Preservation	Property tax benefits	Employment
Provide infrastructure	Website development	Access to learning, Education
Alternative Energy	SBA/USDA/small business loans	Disadvantaged Business
Section 4: Threats		
Federal critical habitat designation	Costs outweigh benefits	Delayed land sale
Jealousy	Market Recession	

Exhibit XI – Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis for AML Project

Business Mission:
AML's mission is to promote goodwill, understanding and respect among the various cultural communities of the world.

Business Vision:
AML's vision is to preserve, protect and inspire humanities understanding of and respect for nature so as it remains intertwined in the fabric of modern society.

Business Goals include:
1. Provide a product that promotes the Natural World and the betterment of human character.
2. Provide a product that exhibits first class resort sport fishing, wildlife viewing, and other recreational activities that utilize the regions resources and conform to Alaska Visitor Statistics Program most enjoyed activities experienced by tourists.
3. Provide product that educates clientele protecting and preserving of the natural environment.

Industry

Comparing Exhibit IV and Exhibit V a variance between the visitor dollars spent and dollars obligated to employees' labor earnings. Between 2013 and 2014 nearly $121 million was spent with a total amount of $44 million paid out to labor resources. This leaves roughly $77 million unaccounted. It was assumed that a sum of that money was obligated to travel related expenses and leisure outside the rural lodge accommodations. In southwest Alaska tourists spent, on average, a one night stop in the regional hubs in route to their final destination. (Group, McDowell , 2011) Considering rural Alaska is not connected via road system additional support is provided to the notion that tourists, on average, spend six days off grid with one travel day.

Company Overview

AML will be the first 100% Alaskan Native owned lodge in the region. With the wealth of insight of the region and its people, the owners bring old stories, native traditions and knowledge about the culture and ways of life that no other lodge owner can provide. This adds to experience AML's visitors will be receiving on Becharof Lake's secluded shorefront.

Visitors will be able to enjoy; fishing, bear viewing (among the most concentrated brown bear populations in the world), bird viewing, sightseeing, hiking, kayaking, or other outdoor activities.

Exhibit XII – Organizational Structure

An S corporation (sometimes referred to as an S Corp) is a special type of corporation created through an IRS tax election. An eligible domestic corporation with less than 100 shareholders can avoid double taxation (once to the corporation and again to the shareholders) by electing to be treated as an S corporation. (Small Business Administration, 2015)

Market and Sales

Four out of five Alaska visitors used the internet for planning their Alaska trip. The Internet usage rates for Alaska trips increased from 68% to 81% between the years 2006 and 2011. Booking rates also increased from 42% to 56% for those years. Nearly half the visitor volume booked a component of their trip through a travel agent.

AML's advertising campaign will reach our target market by means of advertising through: brochures, guide books, magazine ads, the lodge website, trade show conventions, follow up surveys from customers and the use of online booking agents or online booking websites.

AML will also work with travel marketing organizations to increase media coverage of AML. As nearly two-thirds of the sport fishing target market originates in the western United States AML will utilize outlets for advertisements such as; Alaska Airlines Sky Team Magazine and Sport Fishers Magazine. AML will also pursue endorsement by brand names such as Cabela's, Orvis, Field and Stream and Alaska Magazine.

Operations

In viewing other lodges in the region the average maximum occupancy ranges from nine to twenty-five people. AML shall offer sport fishing, wildlife viewing, hiking, and educational teachings about the area, environment, and people. There will be six double occupancy rooms for visitors, two four-bed cabins for staff and a main lodge with the kitchen, lounge and office. The lodge manager will also act as winter man for the facility in the off-season. All labor will be seasonal from May to October.

Management and Ownership

Management shall consist of the sponsors and the primary researcher. Any gaps in the team: certified guides, chefs, pilot, attorney, and accountant will be contractually signed as a third party consultant. The business will be 51% owned by Kelvin Goode and 49% owned by Lucy Goode.

Critical Risks

The purpose of the risk management plan was to document the processes, tools and procedures that will be used to manage and respond to risk events that have positive or negative impacts on the AML project. This plan addressed the topics of:

- Risk Assessment & Analysis
- Risk Response Selection
- Risk Tracking & Reporting

Risk is defined as an uncertain event or condition that, if it occurs, has a positive or negative effect on one or more project objectives. (Project Management Institute, Inc., 2013) Risks initially identified during the initiation process were known as the controlled risks. Risks identified during the project planning and executing process were to be added to the risk register as uncontrolled risks. Any risk added was to be evaluated regarding the potential for impact on the project. Refer to the AML Risk Analysis example below for more information regarding how risks were cataloged, scored and prioritized. The risk analysis tool was separated into two categories, controlled and uncontrolled risks.

Risk assessment regards the determining of the probability that a risk will occur implications leading to an adverse impact the project's scope, schedule, or quality of workmanship. There are four risk response strategies: (Project Management Institute, Inc., 2013)

1) Risk Avoidance
2) Risk Acceptance
3) Risk Mitigation
4) Risk Transference

Listed below are examples of risks and how they would be evaluated for a response strategy. Exhibit XIII is an example of the risk analysis tool generated to track and evaluate risk events.

Weather

Bad weather will only affect the flights to the lodge. The lodge location is protected from high winds and the lakefront is not subject to harsh surf. When weather inhibits customers from leaving or arriving AML will avoid poor customer feedback through compensation for their time. AML will also have NOAA's statistical analysis on weather patterns near the lodge's location. This will allow AML to mitigate down time and schedule around bad weather days.

Economy

As the national and international economy sways the business for guided fishing will as well. To best mitigate the effects of poor economy AML will advertise in both the national and international market. The national markets of the Midwest will be AML's primary target market. Should a recession hit the US, AML will shift its marketing efforts to better suit an international audience.

The only aspect of local economy that will affect AML's operation is the potential of fuel price increases. To offset this cost, the lodge will utilize wind and solar power. The cost savings realized from alternative energy will provide AML a cost buffer for unanticipated price hikes in fuel.

Risk of Injury

The risk of injury is evident with remote locations. The Kodiak Coast guard station is approximately 60 miles east of AML's location. Should help be needed they are not far. Staff will certified in First Aid and CPR as well as be required to attend safety meetings each day before commencing activities.

AML Risk Analysis									
Risk #	Risk Event	Consequence	Qualitative Analysis	Risk Response	Contingency Response/Action	Probability (1-5)	Impact (1-5)	Score (Imp*Prob)	Ranking
4	Projected Business ROI and profitability do not meet expectations of the project sponsors.	Could lead to re-working of business plan or delaying of projected business initiation timeline.	This risk realized possesses potential to terminate or delay the business launch.	Mitigate	Include Cost Benefit Analysis in business plan and report feasibility with each business plan submission for approval.	1	5	5	5

Exhibit XIII –Risk Analysis Example

Financials

Exhibit XIV indicates that the business is profitable and exceeds the 20% goal as set by the sponsors.

Alaska Majestic Lodge
Compressed Income Statement
Calendar Years (2016-2019)

	2016	2017	2018	2019
Revenue	$ 4,831,502	$ 5,314,652	$ 5,846,117	$ 6,430,729
COGS	$ 1,663,601	$ 1,829,962	$ 2,012,958	$ 2,214,253
Gross Profit	$3,167,900	$3,484,690	$3,833,159	$4,216,475
Gross Margin (%)	66%	66%	66%	66%
Operating Expense	$ 585,778	$ 614,155	$ 645,817	$ 680,856
Net Operating Income	$2,582,123	$2,870,536	$3,187,343	$3,535,619
Net Profit Margin (%)	53%	54%	55%	55%
Cash At End of Period	$ 1,904,857	$ 4,242,016	$ 6,768,837	$ 9,518,381

Exhibit XIV – Compressed Income Statement (4 year forecast)

The total capital required for start-up and operation is estimated to be $2,350,000. AML will seek $160,000 of mortgage debt to obtain the land and $2,190,000 through debt financing. The interest rate is expected to be 7-12%.

The mortgage debt will cover the procurement of the land and some equipment. The funds through debt financing will be used to procure materials for the facilities, fishing vessels, equipment, operation costs and marketing expenses for the mortgage debt and 2-5% for debt financing.

The target funding sources shall possess low interest subsidy loan programs for disadvantaged Americans. Some of our preferred lenders that fit this description are listed in Exhibit XIV.

AML Potential Lending Institutions List					
PID#Alaska Majestic Lodge Project	Identification Information				
Stakeholder	Organization	Org. Position	Location	Role	Website
Alaska Growth Capital	Alaska Growth Capital	Upwards	3900 C St. St. #302 Anchorage, AK 99503	Potential Lending Institution	http://alaskagrowth.com/
CFAB	Alaska Commercial Fishers and Agriculture Bank	Upwards	3040 Lakeshore Drive Anchorage, AK 99517	Potential Lending Institution	http://www.cfabalaska.com/
Division of Capital Investment Phillip Viles (Chief)	Guaranteed Loans Program-Bureau of Indian Affairs	Upwards	1951 Constitution Ave, N.W., Room 20 SIB Washington, DC 20245	Potential Lending Institution	http://www.bia.gov/WhoWeAre/AS-IA/IEED/LoanProgram/index.htm
Bristol Bay Native Corporation	Bristol Bay Native Corporation	Upwards	111 west 16th Ave. Suite 400 Anchorage, AK 9501	Potential Lending Institution	www.bbnc.com
Michael Catsi	Alaska Industrial Development and Export Authority	Upwards	813 West Northern Lights Blvd. Anchorage, Alaska 99503	Potential Lending Institution	http://www.aidea.org/Programs/BusinessExportAssistance/LoanGuaranteeProgram.as
Small Business Administration	Small Business Administration	Upwards	4201 L street Suite 300 Anchorage, AK 99501	Potential Lending Institution	www.sba.gove
USDA Rural Development Program	USDA Rural Development Program	Upwards	800 West Evergreen Suite 216 Palmer, AK 99645	Potential Lending Institution	http://www.rurdev.usda.gov/bcp_gar.html

Exhibit XIV–Potential Lending Institution List

Interviews

After assessing the market trends and published data from third party entities an assessment of similar businesses and competition was required. The verbal interviews were completely voluntary. It was found that it is important to cast the net wide when creating a sample population. A lesson learned through this project was that businesses in the wilderness lodging business are not open to the idea of aiding competition. Interviews with similar businesses around the state are preferable and encouraged. A larger sample population of interview candidates increases the chances of receiving positive feedback and information that can prevent losses of time, money and customer satisfaction.

The fact that the interview candidates willing to interface had concerns about competition and elicited the option to adjourn the interview is a good indicator that they have an edge in their market and are trying to protect their clientele base and their profits.

No adjacent or similar lodges in the region were willing to discuss the inner workings or operating methods of their company. This response was a good indication that money is being spent by guests. Impromptu discussions with lodge owners at sports show conventions yielded that advertising is not needed as the word of mouth marketing method captures the entire company target audience.

Conclusions

The findings of the research indicated that this project would be an attractive project for lending institutions or investors to consider pursuing for funding. The first year's projected net profit margin was 53% at an assumed 60% capacity. The projected percent profit margin more than doubled the twenty percent margin requirement initially set by the sponsors. As no data was captured from the interviews the analysis of the findings are based solely off of the literature review and the personal experience from the project sponsors.

The project sponsors consider the final product a success as it meets the financial expectations, demonstrates the uniqueness of AML and delivers the experience that is wished to be conveyed to tourists. The project was pursued knowing that events would transpire which might heighten risk exposure to the various levels of potential risk events that could alter timelines, scope and quality of workmanship. Knowing this, the project manager's use of performance metrics and change management allowed for controlled and sponsor approved expansion or reduction of the projects scope.

Recommendations for further research

It is recommended that future researchers identify success criteria and perform requirements analysis with several iterative stakeholder discussions during the initiation life cycle of the project. It is highly recommended that investigation into "how" to research take place. The amount of time dedicated to drafting the project report could have been reduced had the appropriate level of research into understanding how to research had taken place. Understanding the expectations of the sponsor will furnish the project manager the opportunity to plan the project to a degree that would be considered successful by the sponsor. Exhibit XV is an example of how lessons learned were monitored and tracked.

Lesson Learned #	Life Cycle Process	Category Area of Knowledge	Issue Category	Problem/Success	Impact	Recommendation for Future	Performance Metric In Use for Lesson Category	Performance Metric Recommended in Future for Lesson Category	Response Method Elicited	Date
8	Planning	Risk Management	Incident Reporting	Was not applying dates for when risks were realized.	Unknown when the risk was realized.	Apply a date section on the risk analysis document	Lessons Learned Reporting	Continued use of lessons learned	Continue with Risk Analysis and backdate unknown items	4/8/2015

Exhibit XV–Lesson Learned Example

The act of NOT performing a thorough and relevant self-assessment or capability test prior to commencing work will decrease the quality of the projects delivery in terms of scope, cost, or time. Self-assessments increase the probability of mitigating any adverse impacts to the project by providing the project manager insight to their own strengths and weaknesses. More importantly, this knowledge can aid in structuring the project manager's approach to solving problems and estimating time or labor requirements in delivering work packages.

The body of knowledge for the subject of business planning is limited in one way that is related to the research question. There exists a limitation of publications that combine the topics of project management and business management into one framework. Future research should be conducted in the business arena that incorporates the use of project management frameworks through PMI or institutions similar in nature. Not many published documents that bring the business and project management together. The research above utilized PMI concepts, to deliver the business plan. The research generated through this process can be used to inspire potential entrepreneurs to utilize project management tools and techniques to deliver business plans. More importantly, the integration of

project management tools holds the potential to allow business owners to deliver a professional grade product of quality the owner accepts.

Stakeholder Surveys-Using the ten knowledge areas of project management (PMBOK 5th Ed., 2013) no more than three questions per knowledge area were drafted. This new stakeholder survey is located in Appendix E. It is recommended to use the survey for future projects similar in nature.

Acknowledgments

The project manager would like to thank the to the elders in the Bristol Bay region, particularly Paul Boskoffsky, thank you for your patience with my curiosity and overwhelming amount of questions. The knowledge that is past from you is and always will be cherished and shall be passed on to future generations. To the AML Project Advisory Committee, your teachings and your positive energy have left a mark of great importance on my life. Being able to work with and know you has been truly, inspiring. To the project sponsors, Brett & Lucy Goode, the gifts you have bestowed have lit the way, and in the near term those gifts will light the world. To the reader, thank you for your time and I hope that this project fetches tailings of inspiration for you in some way.

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Alaska Majestic Lodge
-Business Plan-
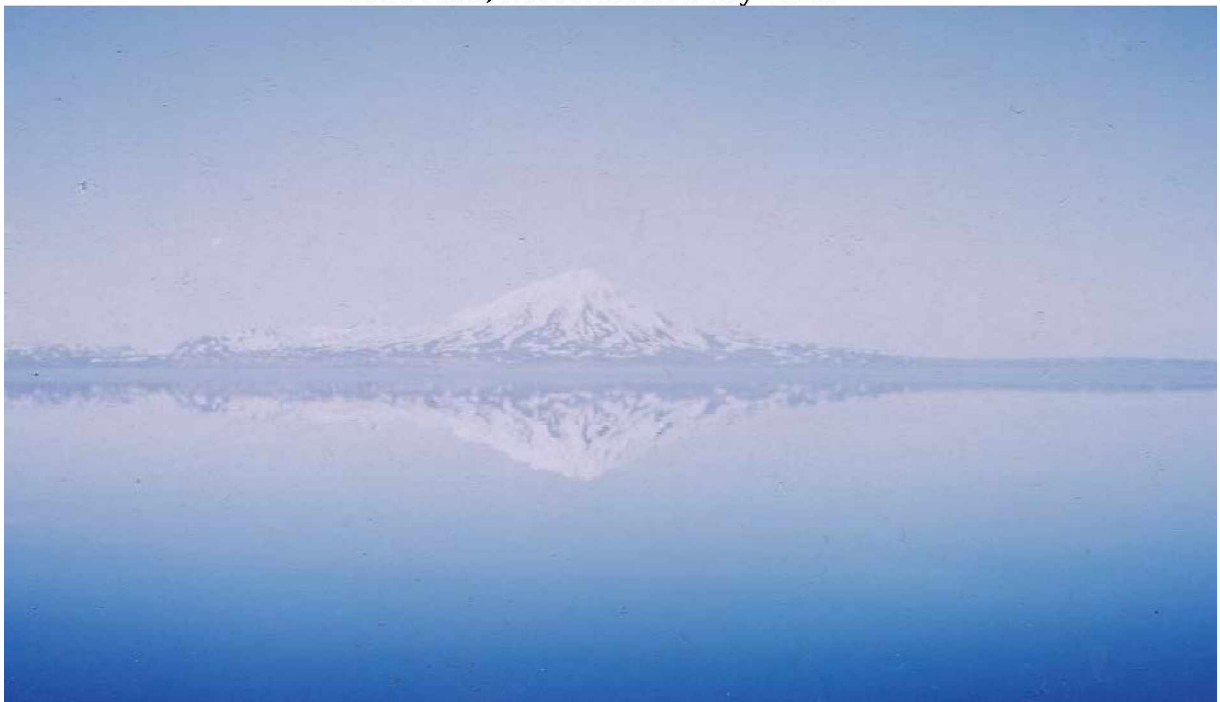
Kelvin Goode
December 2015

Southeast evening view of Mt. Peulik. Location near proposed lodge site.
Above-Photographed by Brett Goode
Next Page-Photographed by Paul Boskoffsky
Mt. Peulik, Northeast mid-day view.

Confidentiality Agreement

The undersigned reader acknowledges that the information provided by Alaska Majestic Lodge in this business plan is confidential; therefore, reader agrees not to disclose it without the express written permission of Alaska Majestic Lodge.

It is acknowledged by reader that information to be furnished in this business plan is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by reader may cause serious harm or damage to Alaska Majestic Lodge.

Upon request, this document is to be immediately returned to Alaska Majestic Lodge.

_____

Signature

_____

Name (typed or printed)

_____

Date

This is a business plan. It does not imply an offering of securities.
For questions regarding this business plan or if this plan is of interest please contact:

Kelvin Goode
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kgchugiaker@hotmail.com

Resumes to be submitted upon request.

Table of Contents

1.0 Executive summary

Beauty, Serenity, Majesty, Solitude; they are a few of many facets that contribute to the value of Alaskan wilderness. What better a place to look for wilderness than Alaska? The last frontier is as infinite with its fishing holes as it is with its moose sightings. Alaska, or The Great Land as known by the Aleuts, with its ability to amaze and wonder, will set the standard for what Alaska tourists consider the best value adventure.

Wilderness fishing lodges provide pinnacle service in terms of fish guiding. Clients willing to pay top dollar expect top dollar service. In terms of uniqueness, wilderness fishing lodges are much like restaurants. No chef cooks the same and every lodge has its own unique feel and delivery of service. Due to Alaska's reputation for world-class fishing, we are pegged at a higher standard in the markets eye. Increasing the visibility of a lodge's operation to an already attentive market ensures client response. This can be seen through the reservation counts of other Alaskan lodges.

The Alaska Majestic Lodge, herein after known as (AML), will be locally owned and operated. AML will be open for business May through October at the lodge location while maintaining a winter office location in Anchorage. The proposed site sits on a 97-acre native allotment located in the Becharof National Wildlife Refuge. Of the twenty-eight lodges in the Southwest Alaska region AML will be the only lodge on the 115 mile shoreline of Becharof Lake. The refuge, with 500,000 acres designated as wilderness by the state of Alaska, presents AML the opportunity to be the first established lodge in the heart of the Becharof National Wildlife Refuge.

AML will offer sport fishing, wildlife viewing, hiking, and educational teachings about the area, environment, and people. There will be six double occupancy rooms for visitors, two four-bed cabins for staff and a main lodge with the kitchen, lounge and office. The lodge manager will also act as winter man for the facility in the off-season. All labour will be seasonal.

AML owners are seeking funding for start-up and land acquisition to commence initiation of this business. AML will seek $2,350,000 in start-up capital to build and operate the business. AML owners will seek bank/investor counselling for the best option to fund this business. It is anticipated that

AML Sales Overview
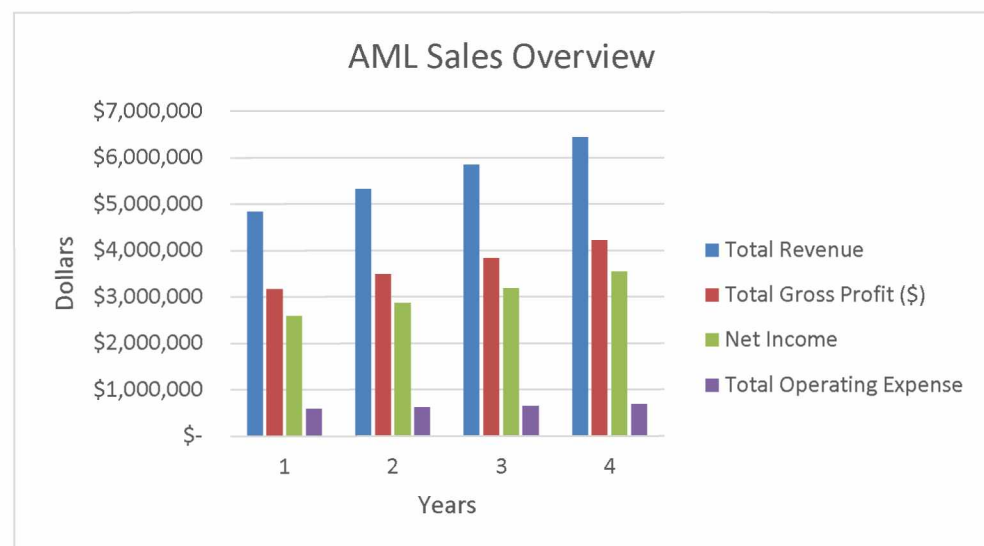
AML will seek debt financing through low interest Native Assistance Loan programs, but AML is open to the idea of equity investment should that become a more attractive funding alternative. With a four year projected net profit margin of 53%, AML will be profitable for any investor or loan entity.

2.0 Industry Analysis

2.1 Industry Overview

The Alaskan tourism industry offers year-round spectacular adventure travel excursions to sight see a variety of destinations throughout our great state. With many outdoor activities available there are numerous lodges that cater services to each activity. The area more specific to this business is known as the Alaskan Peninsula in Southwest Alaska. Roughly the size of the State of California, the Alaskan Peninsula measures to be about 170,000 square miles in area.

Twenty-five to twenty-eight lodges operate in the Southwest Alaska area at any given time during the summer season. Two thirds of the summer visitors that visited southwest Alaska purchased a multi-day package during their visit. The three most popular packages purchased were; fishing lodge packages, wilderness lodge packages, and adventure tours (2013, AVSP).

A summer volume of 1.2 million people spent an estimated $1.5 Billion while on vacation in Alaska from May-September of 2011. The visitor volume increased to 1.96 million people, spending about $1.82 billion in 2013. The Southwest region experienced four percent of that summer visitor volume.
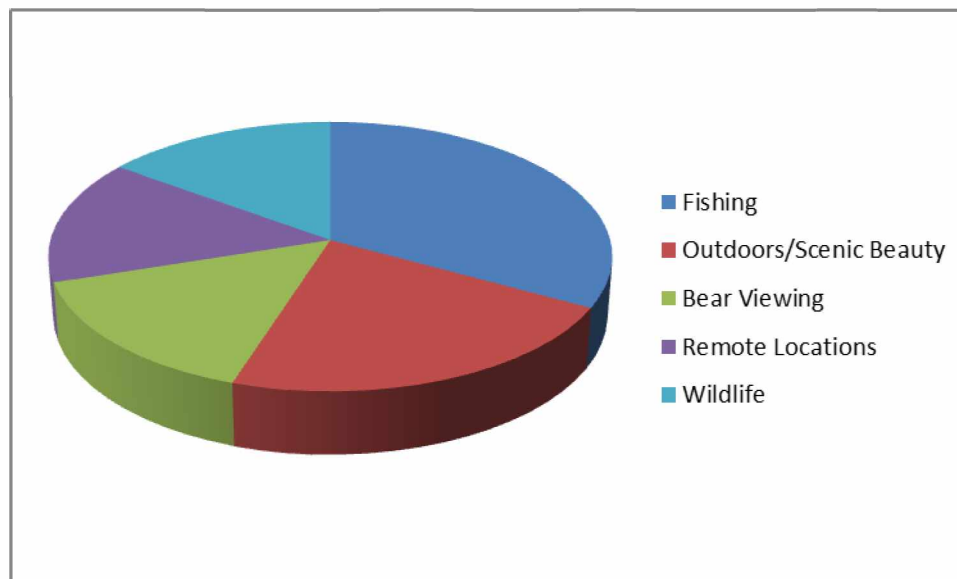

Figure 2.1: Top Five Preferred Activities

The chart above indicates the preferred activity by summer visitor volume for all of Alaska as stated by the Alaska Visitor Statistics Program:

- Fishing   33%

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- Outdoors/Scenic Beauty   22%
- Bear Viewing   15%
- Remote Location   15%
- Wildlife   15%

Since 1980, tourism in southwest Alaska at Katmai National Park, north of AML, cumulatively increased from 11,824 visits to over 82,634 in 2007. An example of Southwest Alaska's economic potential is that in the summer of 2011, over 62,000 people visited the southwest region. This contributed to nearly $84.8 Million to the region's economy. That dollar amount does not account for travel expenses.

Listed below are the top five most enjoyed activities experienced by Southwest Alaska visitors (2013, AVSP):

1) 52 percent enjoyed wildlife viewing
2) 49 percent enjoyed cultural activities
3) 38 percent enjoyed hiking
4) 20 percent enjoyed fishing and
5) 16 percent enjoyed flight seeing

2.2 Competitors

Of the all the lodges on the Alaskan Peninsula are only five direct competitors within a fifty mile radius. The immediate competition, Becharof Lodge and Manditch Lodge, are located outside the mouth of the lakes only entry, forty nautical miles from AML's location. Their clientele fish at that end of the lake and do not venture near AML's location unless chartering planes. The other three lodges; Blue Mountain Lodge, Grizzly Skins Lodge, and Epic Angling and Adventure LLC., are land locked and charter planes to conduct fly-out guiding to other locations.

Outside the businesses mentioned above, there are no other direct competitors. Crystal Creek Lodge, located eighty miles north of AML, is comprised of a log lodge and two small cabins. They offer freshwater fishing and scenic or wildlife tourism packages. Crystal Creek Lodge has been in operation for eighteen years. They use floatplanes and boats to entertain guests who wish to sport fish at various lakes and rivers.

Another competitor is No See Um Lodge. They are located on the Kvichak River thirty miles south of Lake Iliamna, the largest lake in Alaska. They can accommodate up to twenty guests per week in two five-bed houses. Each room is equipped with two twin beds and a bathroom. They provide normal amenities, but lack a nearby superior fishing spot. Due to this they often fly their guests to other fishing locations; this increases their cost which is inevitably passed on to the customer. This has led them to be one of the highest priced lodges in the area.

The largest competition in the region is Brooks Lodge. Their primary attractions are bear viewing and scenic wildlife viewing. A large-scale operation such as Brooks Lodge cannot offer the personal quality service that AML will offer.

2.3 Current Target Market

AML's target market will be anyone ranging in age from their late twenties to their late sixties. AML will target anyone seeking an amazing and unique outdoor or fishing adventure. The blunt of AML's advertising campaign will take place in the western part of the United States as it's shown that two thirds of the market resides there. The top two international visitor groups in the region are shown to be Japanese and German.

3.0 Company

3.1 Concept

AML will be built on the sandy shore of the second largest lake in Alaska and secluded on one of the only native allotment properties in the Becharof National Wildlife Refuge. Due to the exclusive nature of this location the fishing spots remain virtually untouched.

The primary service to be delivered by AML will be sport fishing. AML will also provide service in the other top four most preferred activities by Southwest Alaska visitors. Sport fishing, Hunting licenses and liquor will be available at the lodge for the guests to purchase.

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AML will be the first 100% Alaskan Native owned lodge in the region. With the wealth of insight of the region and its people, the owners bring old stories, native traditions and knowledge about the culture and ways of life that no other lodge owner can provide. This adds to the already unique experience AML's visitors will be receiving on Becharof Lake's secluded shorefront.

Visitors will be able to enjoy; fishing, bear viewing (among the most concentrated brown bear populations in the world), bird viewing, sightseeing, hiking, kayaking, or other outdoor activities. Our guests will wake up, go outside, and enjoy the majestic views and many outdoor activities in complete pristine beauty and seclusion.

"Becharof Lake covers an area of 453 square miles"

Becharof Lake is a 37-mile long lake located 23 miles southeast of Egegik in the Aleutian Range. Becharof Lake is the second largest lake in Alaska. It ranks eighth on the list of largest lakes in the United States by volume and fourteenth on the list of largest lakes in the United States by area, 453 square miles.

It is estimated that nearly 6 million salmon travel to the lake every year. The large population of salmon attract brown bear, which can be found at Becharof in some of the highest numbers in the state. Bear viewing grossed fifteen percent of the regions total tourism revenue in 2011. AML is located between three major tributaries that converge to the lake. Each tributary contains dozens of feeding brown bears.

Our heritage is our legacy—what we live with today is what we pass on to future generations. AML's objective is to preserve our culture, our heritage and nature's fish and wildlife for future generations.

AML's focus will be achieved through excellent customer service that the AML employees will provide. We locals consider the lake region sacred. As my Aunty puts it, "it's our Shangri-La". The lake and its surroundings are absolutely unspoiled. It is in our culture to maintain the lakes pristine nature for future generations.

3.2 Product/Service

AML will offer vacation packages that will include the following:

- Sport fishing
- Sight seeing
- Bird Watching
- Kayaking
- Wilderness Hiking

Our visitors will also enjoy wildlife viewing and local cultural activities when they stay at AML.
The shoreline will have a floating dock with three aluminium boats equipped with outboard motors, weather-proof canopies, and complete tackle and bait for fishing. The dock will have tie downs for the floatplanes, various kayaks and canoes.

There is a historic cabin on the property built by the original owner. This will be preserved as a historic site. Not far from the lodge's location, there is the nationally recognized Kanatak Hiking trail. The lodge will offer guided hiking trips on this trail to the Pacific Ocean side of the Aleutian Range.

3.3 Our Target Market

Our target market is any individual looking for a unique fishing adventure. Many successful fishing lodges attribute their success to attending sports show conventions. Starting up we will utilize this practice to showcase our unique location and quality fishing.

It has been found that our target market customers are looking for a unique and personable experience with the lodge they select for their fishing trips. To best capture these potential clients, the owners will market in the winter and will work on site during the sport fishing season.

3.4 Why we are unique

AML will be the only lodge on the 453 square mile lake. Visitors at AML can expect three full-course meals and different themed cabins in the seclusion of Becharof Lake. AML's visitors will wake up in their own luxurious cabin to a day of sport fishing or other memorable activities.

We will be the only 100% native owned fishing lodge on the Alaskan Peninsula. As such, AML qualifies for low interest native assistance loan programs. These loan programs offer a wide array of funding opportunities for native owned start-up businesses like AML.

AML's mission is to promote goodwill, understanding and respect among the various cultural communities of the world.

AML's vision is to preserve, protect and inspire humanities understanding of and respect for nature so as it remains intertwined in the fabric of modern society.
Another unique characteristic of AML is that we will pledge to contribute back to the region's economy by funding higher education scholarships and vocational programs for disadvantaged locals.

3.5 Company Structure

The corporate structure of AML will be as follows in Figure 3.1

Figure 3.1-Alaska Majestic Lodge Company Structure

AML will be established as a Class S Corporation headquartered seasonally at the lodge location May to October and in Anchorage November to April. There will be seven

employees under management during the summer season and three during the winter season.

4.0 Market and Sales

4.1 Target Market

Advertising will target people who want a truly unique Alaskan Adventure Vacation ranging in age from their late twenties to late sixties.

4.2 How we will attract our customers

Once established, AML intends to lead a commercial marketing campaign similar to that of Tierra Patagonia, a world class resort in Bolivia. View their website and advertising commercial at the URL link provided below:
http://www.tierrapatagonia.com/

Customer solicitation face-to-face will be a powerful form of promotion. This may be attributed to the fact that personal selling will enable AML to match the customer's needs. We will be able to converse with potential customers regarding specific qualities of AML's product line as well as details on the advantages of choosing AML over our competitors. Another important determinant in personal selling is the fact that a certain aspect of care must be provided to each prospective client. The added quality of service from this method has proved successful for similar lodges. This type of selling takes place annually at huge sportsman trade shows and conventions all over the United States.
We plan on attending annual trade shows listed below:

- Dallas, Texas   (Dallas Safari Club)
- Somerset, New Jersey   (Fly Fishing Show)
- Arlington, Texas   (Fly Fishing Show)
- Pleasanton, California   (Fly Fishing Show)
- Pasadena, California   (Fly Fishing Show)

The other package that we will market is our guided day trip package. Since 71% of 2011 Western Alaska visitors spent at least one night in Anchorage we will advertise day trips through various Anchorage media outlets.

4.3 Marketing Channels

AML's advertising campaign will reach our target market by means of advertising through: brochures, guide books, magazine ads, the lodge website, trade show conventions, follow up surveys from customers and the use of online booking agents or online booking websites.

It is anticipated that the primary sales channels will be the owners marketing their business at national outdoor & sportsman tradeshows and conventions as well as social media through the internet. For booking packages; AML will provide an 800 number year round. The AML contact number will be provided on all written advertising, both paper and electronic.

Four out of five Alaska visitors used the internet for planning their Alaska trip. The Internet usage rates for Alaska trips increased from 68% to 81% between the years 2006 and 2011. Booking rates also increased from 42% to 56% for those years. Nearly half the visitor volume booked a component of their trip through a travel agent.

Competitor sport fishing outfits also make their money by word of mouth. AML will capitalize on this with customer satisfaction surveys to improve to service delivery methods.

4.4 Website and Social Media

AML will have a fully developed website capable of allowing customers to book trips online, an 800 number to call and book through the lodge or links referring clients to preferred partner travel agencies. AML plans to advertise through social media via Facebook, LinkedIn, and fishing forums like National Sport Fishers Association.

AML will also work with travel marketing organizations to increase media coverage of AML. As nearly two-thirds of the sport fishing target market originates in the western United States AML will utilize outlets for advertisements such as; Alaska Airlines Sky Team Magazine and Sport Fishers Magazine. AML will also pursue endorsement by brand names such as Cabela's, Orvis, Field and Stream and Alaska Magazine.

5.0 Operations

5.1 Service

The Alaska Majestic Lodge will be a full service resort lodging facility. This will include three double occupancy guest log cabins with different themes for each cabin, two cabins for staff, the main lodge and a sauna. Each cabin will be equipped with a supply room to hang sports gear and raingear. Each cabin will also be equipped with bathrooms and showers. Three meals per day will be served along with daily housekeeping and laundry service. The lodge will provide chest waders, fishing rods and reels, lures, tackle and other amenities that customers will need to fish. The lodge staff will also prepare fish caught in airline approved containers for the client to take home at their departure.

AML's primary focus will be to maximize a great memorable experience for the customer using the safest delivery method possible. The guides will be Certified Wilderness Guides through the Professional Association of Wilderness Guides and Instructors (PAWGI) and will be registered guides through the state.

The logistics of actually transporting the client from their locale to our lodge will be covered by two routes. The primary route for transporting visitors will be a chartered floatplane from Anchorage to AML. The alternate route is to fly direct to King Salmon with Alaska Airlines and to the lodge via float plane. The King Salmon route will likely be used by the day user customer.

AML will contract with a commercial pilot to fly clients from lodge location to Anchorage or King Salmon via floatplane. A positive aspect of the chartered flights out of Anchorage is that it provides the customers a chance to flight see. Flight seeing adds to the memorable experience AML's visitors will be expecting. A direct flight also provides visitors with more time at the lodge instead of being delayed at connecting airports.

The lodge will have one primary chef, one assistant chef and one housekeeper. The facilities manager will be responsible for the maintenance and upkeep of the facility and all of its equipment.

The owners' and manager will alternate between guiding clients and overseeing operations at the facility should one of the guides become incapable of performing work. The manager will contract with professional services for the accounting and legal work. Services for construction will be contracted out as needed throughout the construction process and into operation, should those services still be required.

5.2 Company Capabilities

Once the lodge is established, it is the intention of the owners to work with the community, the native corporations and local governing agencies to help spread the mission and vision of AML.

AML will have a maximum capacity of twelve people. The following services will be available for purchase:

1. Daily Guide Service Fee $ 250
2. 6 day package $ 4,995
3. Private Group Reservation 6 day package $ 59,940
4. Kayak and Canoe Rental (Day Fee) $ 50

Each package will include all amenities the visitor would require. Three full course four-star meals with snacks in between will be served to AML's visitors for the duration of their stay.

It is preferred that the 6 day package be purchased as it does make scheduling easier and it is more economical for the customer. Each Package will offer a variety of activities including kayak trips, hiking trips, sport fishing and sightseeing.

AML will encourage its employees and visitors to understand and follow the company's core values. As discussed above, the preservation of the region's unique wealth and appeal is paramount in AML's mission. So when our guests understand and follow the owner's values this provides them with a chance to view a region of rare beauty in its most awesome form and through the eyes of its people.

5.3 Competitive Advantage

The advantages that AML possesses over its competitors are abundant in many ways. The lodge will be the only establishment on the Becharof Lake shorefront. The lake is 36 miles long, 16 miles wide and has a surface area of 453 square miles. The lake shoreline is estimated to be between 110 and 120 miles and as said before, "does not have one lodge or commercial resort on its shores". This would make AML the first lodging resort on the

shoreline of Becharof Lake. Also, AML's location is not just any particular spot. It is smack dab in the middle of the three largest tributary systems flowing into the south end of the lake.

Our competitors will not be able to compete against AML's shorefront real estate, premium service and the staff's knowledge about the region; its people and their culture. Our customers will wake up, drink coffee and see the water run red with salmon a stone's through away from the lodge.

Staying at AML versus with one of our competitors will also save our visitors at least ten hours per six day package. Essentially, an entire day will be saved should they stay at AML. This also benefits AML in that there are cost savings realized from not having to fly every day like our competitors do.

Another advantage is that the very region AML is nested in happens to be the heart of one of the largest salmon spawning grounds in the world. The annual salmon run is estimated at around 6 million salmon per year, the second largest in the world.

The land parcel is one of few privately owned properties in the Refuge. The majority of those properties are restricted native allotments, including the owner's property. The limited number of other properties in prominent locations ensure limited competition.

The owners of AML qualify for low interest subsidy loans as first time Native American business owners. This is possible through various loan entities such as: Alaska Commercial Fishers and Agriculture Bank (CFAB), Guaranteed Loans Program-Bureau of Indian Affairs, Bristol Bay Native Association, Alaska Growth Capital, and the USDA Rural Development Program.

6.0 Management &Ownership

6.1 Management Team

Brett Goode, as Director of Operations, will be responsible for the lodge's overall operation and management. Brett's extensive background and experience as a construction superintendent on multi-million dollar contracts will ensure the success of the oversight management required for the design and construction process. Brett also holds a US Coast Guard masters license for merchant marine vessels, is a few hours away from a pilot's license and possesses extensive fishing experience.

Lucy Goode will be the Director of Finance & Administration. Lucy has extensive experience managing multi-million dollar contracts in local government as village president and as tribal administrator. She currently works as General Manager for Paug-Vik Inc. Ltd. Village Corporation. She also works as a consultant for her tribe's Transportation Program. Her background working in QuickBooks and grant management with Federal/Tribal Government will ensure the success of the business financially. Lucy is currently pursuing her Bachelors in Business Administration and will be the 49% owner.

Kelvin Goode will be the Director of Marketing and Planning. He will be responsible for the lodge's planning and strategic marketing. Kelvin is a mechanical engineer and is currently pursuing his master's degree in project management. He is near complete with the master programs and expects to graduate with a 3.8 GPA. As a project manager Kelvin has had successful experience in planning and managing multi-million dollar construction projects with the in hospital construction and pipeline construction. Kelvin will be the 51% business owner.

6.2 Gaps in Team

Certified Guides will need to be hired, one being a lead guide. Both Brett and Kelvin can also act as guides if needed. We also need the chef, chef's assistant and housekeeper. Our outsourced team includes the pilot, attorney, and accountant.

6.3 Board of Advisors

The board of advisors will include a variety of subject matter experts. The Board of Advisors will include people under the following designations:

- ➢ Native Elders of the Region
  - \> Paul Boskoffsky, Elder
  - \> P.O. Box 408
  - \> Naknek, AK 99633
  - \> Jack Abalama, Elder
  - \> P.O. Box 209
  - \> Egegik, AK 99579
- ➢ Business Attorney
  - \> William F. Mede, Attorney
  - \> Turner & Mede, P.C.
  - \> 1500 West 33rd Ave. Suite 200

> Anchorage, AK 99503

➢ A Banker or Investor Advisor will be considered as well. Currently we do not have one selected at this time.

West shore sand dunes, Becharof Lake.
Photos taken by Kelvin Goode

Project Management Department, University of Alaska Anchorage

7.0 Critical Risks

7.1 Potential risks and risk responses

Weather

The weather will only affect the flights to the lodge. The lodge location is protected from high winds and the lakefront is not subject to harsh surf. When weather inhibits customers from leaving or arriving AML compensates them for their lost time. AML will also have NOAA's statistical analysis on weather patterns near the lodge's location. This will allow AML to schedule around highly probable bad weather days.

Economy

As the national and international economy fluctuates the business for guided fishing tends to as well. To best mitigate the effects of poor economy AML will advertise in both the national and international market. The national markets will be AML's primary target market. Should a recession hit the US, AML will shift its marketing efforts to better suit an international audience.

The only aspect of local economy that will affect AML's operation is the potential of fuel price increases. To offset this cost, the lodge will utilize wind and solar power. The cost savings realized from alternative energy will provide AML a cost buffer for unanticipated price hikes in fuel.

Risk of Injury

In this line of business, no matter how safe the operation there is always a risk of injury. Nothing is more important than our visitors' health and safety. AML guarantees it will take appropriate measures to ensure maximum safety for our customers. The Kodiak Coast guard station is approximately 60 miles east of AML's location. Should help be needed they are not far. Also we will have certified staff in First Aid and CPR as well as safety meetings each day before commencing activities.

Lodge Location
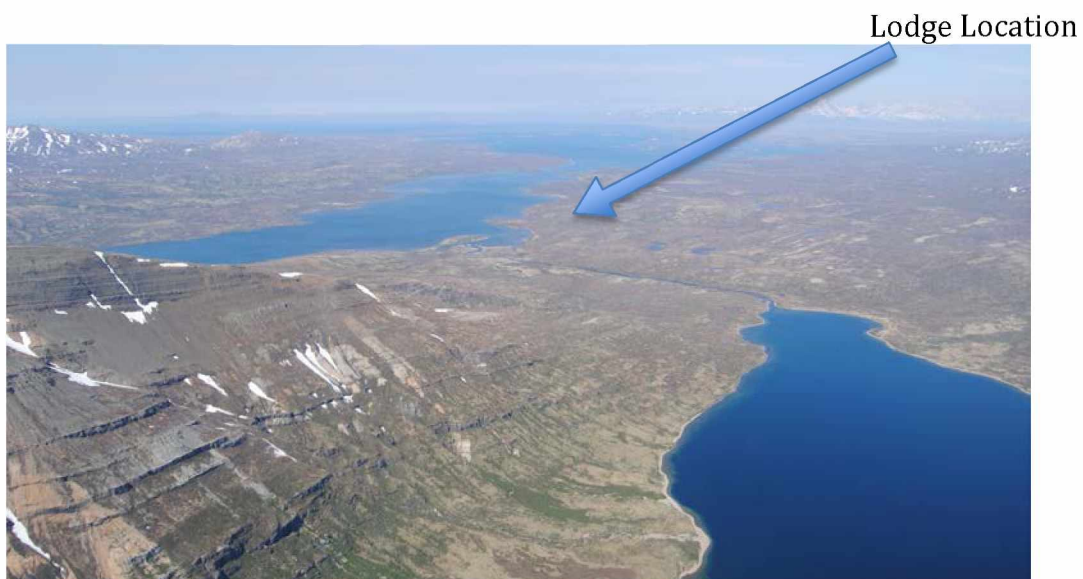
8.0 Financials

8.1 Capital

The total capital required for start-up and operation is estimated to be $2,350,000. AML will seek $160,000 of mortgage debt to obtain the land and $2,190,000 through debt financing. The interest rate is expected to be 7-12% for the mortgage debt and 2-5% for debt financing. These interests are quoted from the preferred lending institutions mentioned in Appendix E.

The target funding sources shall possess low interest subsidy loan programs for disadvantaged Americans. Some of our preferred lenders that fit this description are Alaska Growth Capital, Alaska Commercial Fishers and Agriculture Bank (CFAB), Guaranteed Loans Program-Bureau of Indian Affairs, Bristol Bay Native Corporation, Small Business Administration and the USDA Rural Development Program. The owners are long time CFAB stockholders and qualify for a start-up business program for fishermen who want out of the commercial fishing industry.

The mortgage debt will cover the procurement of the land and some equipment. The funds through debt financing will be used to procure materials for the facilities, fishing vessels, equipment, operation costs and marketing expenses.

8.2 Overview of Financials

The compressed income statement below indicates that the projected returns will be high in regards to profit margins. Please see the Addendum 10.1 for full financials.

Alaska Majestic Lodge
Compressed Income Statement
Calendar Years (2016-2019)

	2016	2017	2018	2019
Revenue	$ 4,831,502	$ 5,314,652	$ 5,846,117	$ 6,430,729
COGS	$ 1,663,601	$ 1,829,962	$ 2,012,958	$ 2,214,253
Gross Profit	$3,167,900	$3,484,690	$3,833,159	$4,216,475
Gross Margin (%)	66%	66%	66%	66%
Operating Expense	$ 585,778	$ 614,155	$ 645,817	$ 680,856
Net Operating Income	$2,582,123	$2,870,536	$3,187,343	$3,535,619
Net Profit Margin (%)	53%	54%	55%	55%
Cash At End of Period	$ 1,904,857	$ 4,242,016	$ 6,768,837	$ 9,518,381

Project Management Department, University of Alaska Anchorage

Appendix A

Supplemental Informative web sites:
http://becharof.fws.gov/
http://www.outdoorindustry.org/advocacy/recreation/economy.html
http://www.commerce.state.ak.us/ded/dev/toubus/research.htm
http://www.americantrails.org/nationalrecreationtrails/trailNRT/Kanatak-Trail-Becharof-NWR-AK.html
http://www.fishalaskamagazine.com/

Websites to market our lodge:

http://www.alaskafishing.com/accommsw.html
    $150 Annually
http://www.resortsandlodges.com/lodging/usa/alaska/southwest.html
    $240 Annually
http://alaska-fishing-directory.com/bristol_bay_lodges_guides.html
    $84 Annually
http://www.1getaway.com/1getaway/links-resorts-and-lodges-us-alaska-southwest.htm
www.alaskawildernesstravel.com
http://alaskatia.org
https://secure.travelalaska.com/
http://www.fishingpursuits.com
http://www.southwestalaska.com/index.php?option=com_content&view=article&id=24&Itemid=59

Sports Shows Schedule:
http://www.huntingfishingandoutdoorshows.com/

Alaska Majestic Lodge

Income Statement
Calendar Years (2016-2019)

	2016 Total	2017 Projection	2018 Projection	2019 Projection
Revenue				
6 Day User	4,595,400	5,054,940	5,560,434	6,116,477
Private Group Reservation (6 day)	59,940	65,934	72,527	79,780
Kayak and Canoe Rental (Day)	500	550	605	666
Daily Guide Service	128,000	140,800	154,880	170,368
Add 1 User Day	3,425	3,768	4,144	4,559
Breakfast	12,902	14,193	15,612	17,173
Lunch	14,746	16,220	17,842	19,626
Dinner	16,589	18,248	20,072	22,080
	-	-	-	-
	-	-	-	-
Total Revenue	$ 4,831,502	$ 5,314,652	$ 5,846,117	$ 6,430,729
Cost of Goods Sold				
6 Day User	781,218	859,340	945,274	1,039,801
Private Group Reservation (6 day)	781,218	859,340	945,274	1,039,801
Kayak and Canoe Rental (Day)	50	55	61	67
Daily Guide Service	67,840	74,624	82,086	90,295
Add 1 User Day	651	716	787	866
Breakfast	9,032	9,935	10,928	12,021
Lunch	10,322	11,354	12,490	13,738
Dinner	13,271	14,598	16,058	17,664
	-	-	-	-
Total Cost of Goods Sold	$ 1,663,601	$ 1,829,962	$ 2,012,958	$ 2,214,253
Total Gross Profit ($)	$3,167,900	$3,484,690	$3,833,159	$4,216,475
Gross Profit Margin (%)	65.57%	65.57%	65.57%	65.57%

Operating Expenses				
Sales & Marketing	8,000	8,400	8,820	9,261
Mortgage Payment	9,000	9,450	9,923	10,419
Utilities	6,000	6,120	6,242	6,367
Security	2,500	2,500	2,500	2,500
Phones/Internet	3,250	3,348	3,448	3,551
Insurance	15,000	15,000	15,000	15,000
Accounting/Tax	1,000	1,020	1,040	1,061
Travel & Entertainment	4,000	4,060	4,141	4,224
Supplies	30,000	30,900	31,827	32,782
State License	500	500	500	500
Product Development & Branding	1,500	1,500	1,500	1,500
Vehicle Upkeep	8,000	16,700	27,500	40,400
Payroll Taxes 15%	45,134	47,391	49,760	52,248
Total Personnel	104,000	109,200	114,660	120,393
Equipment	25,000	28,750	33,063	38,022
Benefits	8,000	8,080	8,161	8,242
Janitorial	4,000	4,000	4,000	4,000
Office Supplies	3,500	3,500	3,500	3,500
Bad Debt	-	-	-	-
Payroll and IT Services	300,894	306,912	313,050	319,311
Repairs & Maint.	1,500	1,575	1,654	1,736
Misc	3,500	3,675	3,859	4,052
Web Site	1,500	1,575	1,670	1,786
Total Operating Expense	**585,778**	**614,155**	**645,817**	**680,856**
Net Income	**$2,582,123**	**$2,870,536**	**$3,187,343**	**$3,535,619**
Net Profit Margin (%)	**53.44%**	**54.01%**	**54.52%**	**54.98%**

Appendix C

Alaska Majestic Lodge
Projections - Balance Sheet
Calendar Years (2016-2019)

	2016 Projection	2017 Projection	2018 Projection	2019 Projection
ASSETS				
Current Assets				
Cash	1,904,857	4,242,016	6,768,837	9,518,381
Accounts Receivable	-	-	-	-
Total Current Assets	1,904,857	4,242,016	6,768,837	9,518,381
Long-Term Assets				
Furniture and Fixtures	120,000	140,000	165,000	195,000
Accumulated Deprecriation (Bldg.)	(8,000)	(24,700)	(52,200)	(92,600)
Building	400,000	835,000	1,375,000	2,020,000
Total Fixed Assets	512,000	950,300	1,487,800	2,122,400
Other Assets				
Equipment	45,000	73,750	106,812	144,833
Office Equipment	5,000	10,000	15,000	20,000
Vehicles	300,000	375,000	475,000	600,000
Miscellaneous	-	-	-	-
Prepaid Marketing	-	-	-	-
Grants	-	-	-	-
Other (Current Asset) Land	160,000	336,000	529,600	742,560
Total Other Assets	510,000	794,750	1,126,412	1,507,393
TOTAL ASSETS	2,926,857	5,987,066	9,383,049	13,148,174
LIABILITIES & EQUITY				
Current Liabilities				
Accounts Payable	136,734	150,408	165,449	181,993
Notes Payable	-	-	-	-
Line of Credit	-	-	-	-
Total Current Liabilities	136,734	150,408	165,449	181,993
Long-Term Liabilities				
Mortgage	-	-	-	-
Long- Term Loan	-	-	-	-
Long-Term Liabilities	-	-	-	-
Total Liabilities	136,734	150,408	165,449	181,993
Equity				
Paid In Capital				
Outside Investors	-	-	-	-
Partner's Capital	48,000	48,000	48,000	48,000
Retained Earnings	$2,582,123	$5,628,658	$9,009,601	$12,758,180
Total Equity	2,630,123	5,676,658	9,057,601	12,806,180
Total Liabilities & Owner's Equity	2,766,857	5,827,066	9,223,049	12,988,174
	(160,000)	(160,000)	(160,000)	(160,000)

Appendix D

Alaska Majestic Lodge
Projections - Statement of Cash Flows
Calendar Years (2016-2019)

	2016 Projection	2017 Projection	2018 Projection	2019 Projection
OPERATING ACTIVITIES				
Net Income	2,582,123	2,870,536	3,187,343	3,535,619
Adjustments to reconcile Net Income				
to net cash provided by operations:				
Depreciation	8,000	16,700	27,500	40,400
Accounts Receivable	-	-	-	-
Accounts Payable	136,734	13,673	15,041	16,545
Payroll Clearing	-	-	-	-
Net cash provided by Operating Activities	**2,726,857**	**2,900,909**	**3,229,883**	**3,592,564**
INVESTING ACTIVITIES				
Furniture and Fixtures	(120,000)	(20,000)	(25,000)	(30,000)
Building	(400,000)	(435,000)	(540,000)	(645,000)
Equipment	(45,000)	(28,750)	(33,062)	(38,021)
Office Equipment	(5,000)	(5,000)	(5,000)	(5,000)
Vehicles	(300,000)	(75,000)	(100,000)	(125,000)
Miscellaneous	-	-	-	-
Net cash provided by Investing Activities	**(870,000)**	**(563,750)**	**(703,062)**	**(843,021)**
FINANCING ACTIVITIES				
Opening Bal Equity	-	-	-	-
Outside Investors	-	-	-	-
Partner's Capital	-	-	-	-
Grants	-	-	-	-
Net cash provided by Financing Activities	**-**	**-**	**-**	**-**
Net cash increase for period	1,856,857	2,337,159	2,526,821	2,749,543
Cash at beginning of period	48,000	1,904,857	4,242,016	6,768,837
Cash at end of period	**1,904,857**	**4,242,016**	**6,768,837**	**9,518,381**

Appendix E

AML Potential Lending Institutions List					
PID#Alaska Majestic Lodge Project	**Identification Information**				
Stakeholder	**Organization**	**Org. Position**	**Location**	**Role**	**Website**
Alaska Growth Capital	Alaska Growth Capital	Upwards	3900 C St. St. #302 Anchorage, AK 99503	Potential Lending Institution	http://alaskagrowth.com/
CFAB	Alaska Commercial Fishers and Agriculture Bank	Upwards	3040 Lakeshore Drive Anchorage, AK 99517	Potential Lending Institution	http://www.cfabalaska.com/
Division of Capital Investment Phillip Viles (Chief)	Guaranteed Loans Program-Bureau of Indian Affairs	Upwards	1951 Constitution Ave, N.W., Room 20 SIB Washington, DC 20245	Potential Lending Institution	http://www.bia.gov/WhoWeAre/AS-IA/IEED/LoanProgram/index.htm
Bristol Bay Native Corporation	Bristol Bay Native Corporation	Upwards	111 west 16th Ave. Suite 400 Anchorage, AK 9501	Potential Lending Institution	www.bbnc.com
Michael Catsi	Alaska Industrial Development and Export Authority	Upwards	813 West Northern Lights Blvd. Anchorage, Alaska 99503	Potential Lending Institution	http://www.aidea.org/Programs/BusinessExportAssistance/LoanGuaranteeProgram.as
Small Business Administration	Small Business Administration	Upwards	4201 L street Suite 300 Anchorage, AK 99501	Potential Lending Institution	www.sba.gove
USDA Rural Development Program	USDA Rural Development Program	Upwards	800 West Evergreen Suite 216 Palmer, AK 99645	Potential Lending Institution	http://www.rurdev.usda.gov/bcp_gar.html

Loan Entities-Anchorage Area

- Alaska USA Federal Credit Union Anchorage
- Alaska Seeds Bank Anchorage
- Anchorage Heritage Land Bank Anchorage
- Bank of America Home Loans Anchorage
- Denali Alaskan Federal Credit Union Anchorage
- GMAC Mortgage Corporation Anchorage
- First National Bank Anchorage
- Key Equipment Finance Anchorage
- Matanuska Valley Federal CU Eagle River
- National Cooperative Bank FSB Anchorage
- Northern Skies Federal Credit Union Anchorage
- Northrim Bank Anchorage
- Green, Curtis - State Farm Insurance Agent Anchorage
- Swiss Port Anchorage
- UBS Financial Svc Anchorage

- [Wachovia Securities](#) Anchorage
- [Wells Fargo Investments](#) Anchorage

Appendix B

Project Management Department
UNIVERSITY of ALASKA ANCHORAGE

<u>**INFORMED CONSENT DOCUMENT**</u>
EXPERT OPINION AND PRODUCT OR SERVICE INFORMATION REQUEST

Researcher(s):
Kelvin A. Goode – Principal Investigator (Project Manager)
(907) 952-1805

WHAT IS THE REASON FOR THIS SURVEY?
This survey is purposed to attain information regarding a prospective product/service for sale or expert advice regarding the sequence of project activities and their corresponding timelines. The goal of the survey is to attain enough quality information regarding the project such that the implementation of the project unfolds with minimized risk. Findings will be used for the planning and development of the business and will be kept confidential under lock and key or a personal external hard drive.

WHAT WILL I BE ASKED TO DO?
Individuals that choose to participate will complete a telephonic interview with the Researcher, Kelvin Goode. The interview will focus on a particular product or service that is being offered and information associated with its functionality. The participant may be asked to send product information or cost and shipping information. Subject Matter Experts will be asked to advise on work tasks, identify potential risks and offer any suggestions for alternative routes of action.

IS THERE ANY COMPENSATION?
No, however the choice to participate may win future business with the researcher's project.

WHO CAN PARTICIPATE?
You are invited if you are a sales or procurement representative for the company of your employ or if you are a subject matter expert with intimate understanding of the business idea and project site location.

WHAT ARE THE POTENTIAL BENEFITS AND RISKS?
There are no personal benefits, however there is potential for benefits to the organization of your employ. There are no risks.

WHAT ABOUT CONFIDENTIALITY?
The answers will be kept completely private stored on a personal external hard drive (if electronic) and under lock and key in my home (if hard copy). No personal identifiable information will be used when recorded. Random identifiers will be assigned and kept on a sheet of paper, which is set for destruction three years after the interview.

WHAT IF YOU DON'T WANT TO PARTICIPATE IN THE SURVEY?
Participation is completely voluntary. Should you start, you may stop at any time without reason and may elect to pass and move to the next question without providing an answer.

WHAT IF I HAVE QUESTIONS?
If there are questions or concerns regarding participant rights, please contact Sharilyn Mumaw, (UAA Research Compliance Officer) at (907) 786-1099. If there are questions regarding the research, please contact Kelvin Goode, (Principle Investigator) at (907) 952-1805 or Roger Hull, (Faculty Advisor) at (907) 786-1923.

I have read and understand the above and agree to participate in this study:
- ○   **YES**
- ○   **NO**

Name: (Print)_____ **Date:**_____
Name: (Sign-electronic works as well)_____ **Date:**_____

Appendix C

UAA Project Management Department
UNIVERSITY of ALASKA ANCHORAGE

INTERVIEW PROTOCOL FORM
EXPERT OPINION AND PRODUCT OR SERVICE INFORMATION REQUEST

INTERVIEW DATE:
ORGANIZATION:
PARTICIPANT AND ROLE:

OTHER DISCUSSION:

REFERENCES DISCUSSED:

ADDITIONAL COMMENTS:

INTERVIEW INTRODUCTION

You have been selected as either a subject matter expert or preferred vendor to help provide input for a Thesis Capstone Project that I am working on to graduate from the University of Alaska Anchorage. The project is the business design and construction planning effort. Please review, sign and send the consent form to me electronically so that we can get started with the information request.

Firstly, thank you for choosing to take part in this project. This interview is expected to take no less than 15 minutes, however this depends on the product/service in discussion. The following paragraph is a summary of the project to which the research is concerned.

> An opportunity has risen to design and construct a wilderness fishing lodge that caters first class service to customers willing to tour remote regions of the Alaskan Peninsula. The proposed lodge site is nestled off the grid in a region known as the Becharof National Wildlife Refuge. The lodge, located on the shores among the thickest salmon runs in the world, will be prime real estate for a fishing operation.

The purpose of the research is to gather data concerning the requirements for business planning, construction planning, execution and operation.

All Survey Questions will be conducted verbally.
The participant may choose to sign the consent form or not participate.
All questions asked with responses provided will be archived for three years.
The following are not all of the questions as each vendor or participant possesses and sells a unique service or product. Questions not on here will be added and archived to the individual's survey.

MECHANICAL VENDORS
What are the optimal operating temperature(s) for the requested equipment?
What is the thermal footprint of the material used to build the facilities?
What system(s) is ideal for our project and how much would they cost?

ELECTRICAL VENDORS
Are these systems compatible with 480 V 3 Phase?
What types of bad weather are the solar roofing tiles able to withstand?
What is the energy production per square foot on the solar tiles?

EQUIPMENT VENDORS

How heavy is this piece of equipment?

How much does this piece of equipment cost?
Is there Freight On Board (FOB) to the Jobsite?
Is cost of shipping included?

What are the lead times associated with receiving the piece of equipment to the jobsite?

How efficient on fuel is this piece of equipment?

SHIPPING VENDORS
How much does it cost per pound to ship?
Are there advantages to using this type of shipping method?
Are there dangers to using this type of shipping method?
What is the lead time associated with shipping the said item?

BUSINESS COMPETITION
What services does the lodge offer?
Where is the lodge located?
How much do those service packages cost?
What sorts of risks are associated with services offered?
How many facilities does the said company have? Dining, Housing, Other?
Are there extra costs at the lodge site when I get there?
Will I experience a high volume of foot traffic in the lodge while I'm there?
Is there a benefit to locals from the services offered?
What benefit will I expect to receive from the stay at this lodge versus another?

SUBJECT MATTER EXPERT
Do you feel the shipping methods are feasible for that geographical region?
What provisions might we need for that specific location?
What sorts of wildlife protection would be advisable for that specific location?
Are these logistics plans feasible? If not, might there be suggestions for alternative approaches?

Appendix D

Kelvin Goode	Regulation Requirements			
PM 686B Fall 2015				
Requirement Description				
Health Requirements				
General health and safety standards, water and sewage disposal system required.				
Facility Cleanliness, floors, walls, ceilings, no sleeping accomodations in areas of food storage, prepared, served.				
Linens after guest cleanliness				
Food Service Requirements				http://dec.state.ak.us/eh/fss/
Commercial Ventilation requirements				
Food Service Permit, requires dishwasher that reaches 160deg F during full cycle,				
Alaska Department of Environmental Conservation (DEC)				
Division of Environmental Health/Food Safety and Sanitation Program				
Chapter 31 of the Alaska Administrative Code (AAC)				
Commercial Recreation on State Lands				
Register and attain a commercial recreation permit with Department of Natural I				http://www.dnr.state.ak.us
Fire Safety Requirements				
Alaska Department of Public Safety, Division of Fire and Life Safety				http://www.dps.state.ak.us/fire/
Zoning Requirements				
Lake and Pen borough Sub division regulations and general standards				
Building Code Requirements				
Lake Alaska Statutes and Home R Permitting				www.lakeandpen.com
Americans with Disabilities Act (ADA)				http://www.usdoj.gov/crt/ada/ada homl.htm; call 800-514-0301.
Insurance Requirements				
Property and Liability				
Life and Health				
How many rooms you will rent, and how many people will you rent to?				
Will you be transporting guests? Will you be serving guests food?				
What is the square footage of your lodge and the average ceiling heights?				
When did you last upgrade your heating system, roof, plumbing, and wiring?				
What is the estimated replacement cost of all contents – business and personal?				
Reporting Requirements				
IRS Reporting, keep records three years, list name & residence of customer				
Income Tax Requirements				
Accountant should discuss taxes w owner				
Business License requirements				
Department of Commerce, Community and Economic Development (DCCED) b				907-269-8173
May require more than one license if providing more service than just lodging. Maybe a Professional license.				
Lake and Pen borough license				

Appendix E
Questionnaire Survey for Future
Rural Alaska Lodges

This survey has been generated by Kelvin Goode, UAA Student, in an effort to incorporate lessons learned.

This survey is completely voluntary and no response is required should the survey participant not want to furnish a response. Any survey participant response will be kept completely anonymous. If there are questions regarding this survey please do not hesitate to contact the surveyor, Kelvin Goode at (907) 952-1805 or at kagoode@alaska.edu.

Thank you for your time and consideration,

Respectfully,

-Kelvin Goode, UAA Project Management Student

Integration Management

Project Genesis: What inspired you to create a business where it's at?

Project Sponsoring: How was the project funded?

Company Type: What type of company are you? Sole Proprietor, corporation? Were there advantages or disadvantages in selecting this business model for the location or service type?

Service Capacity: What is your service capacity? Is there a special reason why that's the number selected? Is it environment related or logistics related?

Knowledge Application: Were any construction or project management methodologies used in the building or creating of your business? If so, were they helpful?

Scope Management

Services Offered: Does your company offer more than one service?

Service Packages: Is there a, "most popular package" for your establishment?

Business Activities: What activities are most enjoyed by customers? Are there more than one?

Gear: Is gear expensive? How does their gear performance relate from excellent quality brands to not so excellent?

Power: How does your establishment supply power demands and energy generation off grid? Is it safe or high risk?

Cost Management

Shipping: What is the best shipping method for your location? Is that the only method to ship goods and services?

Materials: How does the cost of shipping the materials compare to an average on the grid lodge? Is it more logistical?

Risk Exposure: How does the high risk and added costs of being at your location impact your company?

Time Management

Scheduling: Are any scheduling methodologies used? Example: MS Project, Primavera.

Weather: How does the weather play a role in scheduling and transporting customers?

Communications Management

Marketing: Being off grid and not accessible to roads, how do you market to your customers? Are some marketing techniques more effective than others?

Communication: What is the primary mode of communication from your location to the outside world?

Communication: How far in advance do you have to communicate with your customers to book reservations?

Human Resources Management

Guides: What is the maximum number of customers one of your guides can provide services to? Do you contract your guides in house?

Quality Management

Food: What food style is served at your establishment? Has it always been that way? Are there preferred food suppliers for your location? Is food included in the service package?

Entertainment: Is there a most popular form of entertainment when not guiding or outside?

Customer Satisfaction: How does your establishment rate customer satisfaction?

Risk Management

Weather: What alternatives are there for customers should bad weather occur?

Insurance: Were there difficulties finding insurance coverage for such a business? Are there preferred providers for your line of business at your location?

Safety: What safety programs do you have?

Bears: Do you have bear vandalism or bear safety problems?

Procurement Management

Transport: How do customers arrive to your location? Is it safer to contract transportation services out or to own and perform in house?

Contracting: Did you purchase or build your establishment? Was a contracting method used? If so, would you use it again?

Accounting system: Does your company use any cost accounting or purchasing software? Are there benefits with that software system over others? Are there disadvantages?

Stakeholder Management

Clientele: How do you generate your customer base? What is the target audience for your business?

Lessons Learned: From the 30,000 foot view of your business, if there were a few things you'd do over again what would they be and why?

Alaska Majestic Lodge Project

Kelvin Goode, MSPM Student
Fall 2015, PM 686B

UAA Project Management
UNIVERSITY of ALASKA ANCHORAGE

KEEP CALM AND FISH ON

The plan, overview of all the finer project management planning. Issues encountered, risks realized/contingency planning, lessons learned, WPI/SPI, Scope changes and the journey to here.
Talk first about PM 686A (Project or inputs) then PM 686B (products or outcomes)

Go over agenda in one minute, synopsis of the planning, where we are. Add schedule, changes, and project management vernacular.

Rewording headings to help reinforce what is said.

3-5 min – High Level (PM)
20 min – Knowledge areas (BP)
5 min – Contributions

This project is very close to our hearts. I used this picture as a symbol of that. The symbol of our Tribe is the Eagle. I personally look at them with mysticism.

The plan, overview of all the finer project management planning. Issues encountered, risks realized/contingency planning, lessons learned, WPI/SPI, Scope changes and the journey to here.
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How do we put down into words what is expected and scoped? Project Planning

Before we get to the project, I'd like to speak a little about myself.
- Born in Dillingham
- Raised in Egegik
- World Traveler
- Connoisseur of Cultures
- Am Very Excited about This Journey

"If you work just for money, you'll never make it, but if you love what you're doing and you always put the customers first, success will be yours."- Ray Kroc

Ray Kroc: October 5, 1902 – January 14, 1984

Spring 2015 Kelvin
Goode PM 686A

Do not ask more than once on people's quotes. One and done.
Will explain why we Identify with Ray Kroc. It's our home, it's where our heart is. Therefore whatever we create, shall incorporate all of our heart, blood, sweat and tears.

Preserve, Protect, Inspire

- 100% Native Owned Lodge
- Single Proposed Lodge on Becharof Lake Shore
- No other available property on Becharof Lake
- 100% Vested in the Region
- Belief in Giving Back

Fall 2015, Kelvin Goode
PM 686B

Brett Goode – 2013 Ugashik Mountain Trek

Why is this opportunity important?
Opportunity to share something close to our hearts.
Opportunity to share our heritage
Lucrative Opportunity

This place is our home. It's the place most sacred to us.

Project Goals & Objectives
- Product doubles as template for future
- WPI is greater than .90
- Lessons learned, risk and scope changes are cataloged

Product Goals & Objectives
- Product Promotes Natural World
- First Class Service
- Wild life viewing

Project Scope

Alexandria Goode – 2013, Ugashik Mountain Trek

Project Scope Includes

Initiating and Planning Deliverables
-Development of Stakeholder Identification and Analysis
-Development of Risk Identification and Analysis tool
-Development of overall project schedule
-Monitoring of Work Performance
-Development of Project Management Plan
-Development of Research Methods, Surveys and Research Data Analysis

Executing, Monitoring and Controlling, and Closing Deliverables
-100% Complete Business Plan
-Development of list of Approved Vendors and Funding Agencies
-100% Complete Project Management Plan

Fall 2015, Kelvin Goode
PM 686B

Business Goals include:

Provide product that promotes the Natural World and the betterment of human character.
Provide a product that exhibits first class resort sport fishing, wildlife viewing, and other recreational activities that utilize the regions resources and conform to Alaska Visitor Statistics Program most enjoyed activities experienced by tourists.
Provide product that educates clientele in protecting and preserving of the natural environment.

Why A Lodge?
    Spread visuals throughout presentation.
    Was it interesting? Adjust to make interesting.
    Visualize more than bullets

Project Objective: The objective of the project is to deliver a final business plan of the proposed Alaska Majestic Lodge business. The business plan should provide the steps necessary to successfully saturate the market for sport fishing and tour guiding in the Becharof National Wildlife Refuge. Through this endeavor, the Project Manager shall demonstrate his knowledge and mastery of project management principles via demonstration of understanding the project management knowledge areas of Scope Management, Time Management, Risk Management and Quality Management.

PMP has included all but procurement, cost, human resources.

Understanding Success

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Strengths

Financially Educated	Humor	Intuitive
Family Oriented	Business Savy	Honesty
Bountiful Land Resources	Unified in Goal	Friendly
Perspective	Culture belongs to region	Quick to learn
Integrity	Creative	Strong work ethic
Innovative	Gratitude	Inspired

Section 2: Weaknesses

Liabilities	Much information to review	Access to land
Small Population	Single human resource for project	Seasonality of the Land

Section 3: Opportunities

Cultural Preservation	Property tax benefits	Employment
Provide infrastructure	Website development	Access to learning, Education
Alternative Energy	SBA/USDA/small business loans	Disadvantaged Business

Section 4: Threats

Federal critical habitat designation	Costs outweigh benefits	Delayed land sale
Jealousy	Market Recession	

"There are no secrets to success. It is a result of preparation, hard work, and learning from failure." – Colin Powell

Fall 2015, Kelvin Goode
PM 686B

Proves we're well versed in the project management arena as well as the business arena. Signifies professionalism and an understanding for how to set goals and objectifies that are tangible and within our level of knowledge to attain.

Why is what we plan to do important?

Things I learned in the wilderness: Observation, Knowledge, Common Sense & Gratitude – *Paul Boskoffsky*
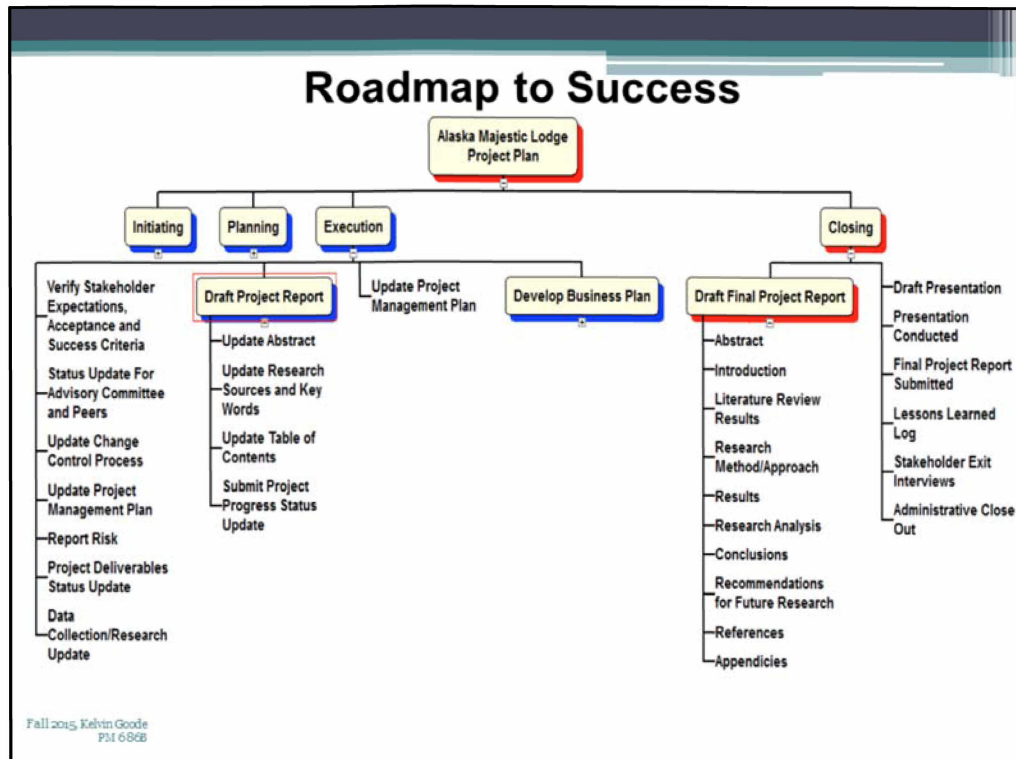
Work break down structure must accommodate the scope requirements. All of the work and only the work. Be sure to link to the Divide and conquer and project scope slide.

Table of Contents

Divide and Conquer

Nothing is particularly hard if you divide it into small jobs. ~ *Henry Ford*

Fall 2015, Kelvin Goode
PM 686B

Do not ask more than once on people's quotes. One and done.

Will explain why we Identify with Ray Kroc. It's our home, it's where our heart is. Therefore whatever we create, shall incorporate all of our heart, blood, sweat and tears.

       Industry Overview
       Competitors
       Current Target Market

Company
       Concept
       Product/Service
       Our Target Market
       Why we are Unique
       Company Structure
Market and Sales
       Target Market
       How we will attract our customers
       Marketing Channels
       Website and Social Media
Operations
       Service
       Company Capabilities
       Company Advantage

Management & Ownership
    Management Team
    Gaps in Team
    Board of Advisors
Critical Risks
    Potential Risks and Risk Responses
Financials
    Capital
    Overview of Financials
Supporting Documentation aka Appendicies
    Information regarding the region, marketing information and sports show
    conventions

This slide is dedicated to delivering information regarding what fruits AML hopes to produce with regards to research.

University of Alaska Center for Economic Development

Looked at business planning websites and sources that can aid in developing a business plan.

Looked at businesses within the state

Looked at Tourist Volume and Spending Information. Cross Referenced that with the number of lodges in southwest.
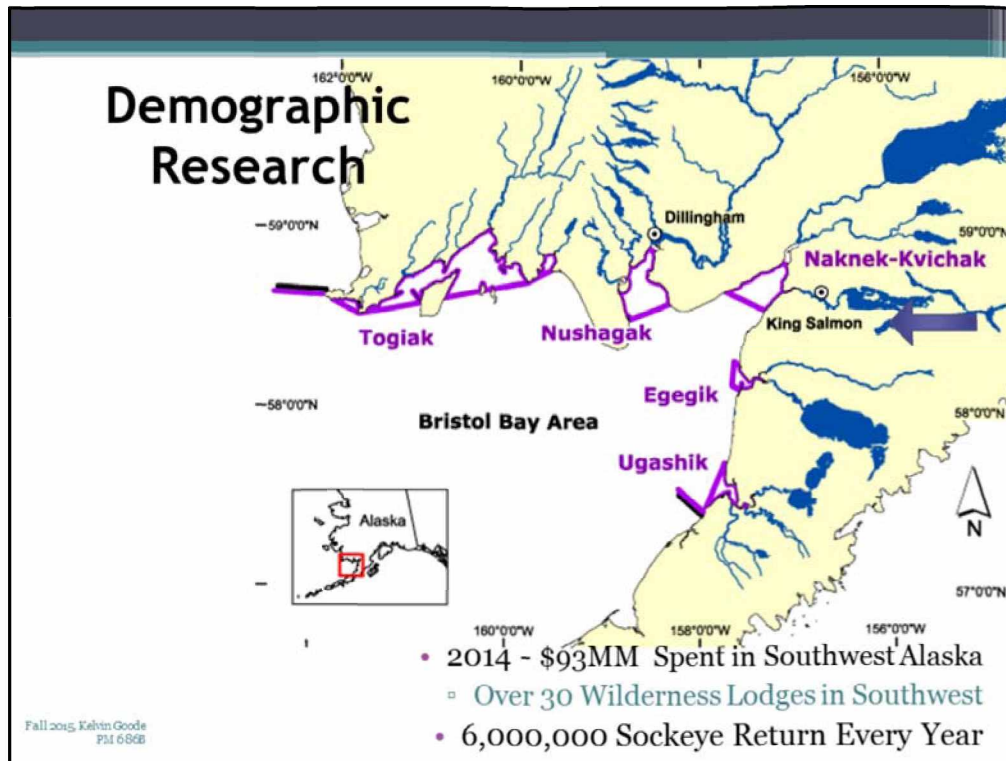
Becharof National Wildlife refuge is about 1750 square miles.

Becharof Lake is 453 square miles.

755 square miles of the Refuge was designated as the Becharof Wilderness by the Alaska National Interest Lands Conservation Act.

37 miles long lake.

23 miles southeast of egegik.

Becharof lake is the second largest lake in alaska.

The Alaska Visitor Statistics program has shown that since 2012 a 7% increase in tourist volume has been realized in Southwest Alaska.

AML will seek $2,350,000 in start-up capital to build and operate the business.

This project is very close to our hearts. I used this picture as a symbol of that. The symbol of our Tribe is the Eagle. I personally look at them with mysticism.

The plan, overview of all the finer project management planning. Issues encountered, risks realized/contingency planning, lessons learned, WPI/SPI, Scope changes and the journey to here.
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How do we put down into words what is expected and scoped? Project Planning

Why is this opportunity important?
Opportunity to share something close to our hearts.
Opportunity to share our heritage
Lucrative Opportunity

This place is our home. It's the place most sacred to us.

Trailblazing – Use words like this for Title headings.
*Confusing words contribute to lack of attention.
6,000,000 sockeye salmon return to spawn every year

Brown Bears, Caribou, Moose, 200 types of birds, fox, wolf, beaver and other critters
Competition
Nearest established lodge over 40 miles away
Any competition fly guests in daily
        Increases their overhead and lessens their guests time fishing!
28 lodges on the Alaskan Peninsula
Other Competition
        State, National and International resorts similar to AML

Discuss how important the land means in our culture and how this opportunity will help our people and the land we're tasked with preserving.

How it all unfolded
- Opportunity Realization
- Project Definition
- Business Analysis
- Research Approach
- Analysis of Findings
- Product Delivery

Paul Boskoffsky – 2015, Becharof Lake

Fall 2015, Kelvin Goode
PM 686B

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How it all unfolded

Change Management & Risk
- Total of 12 Changes
- Total of 21 Risks

# of events
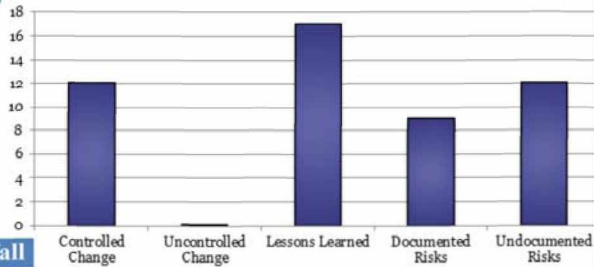
Risk Score & Urgency Matrix Waterfall				
Prob	Threats			
5	3C		6C		1U, 12U
4		14U			1C
3			2C, 7C	2C, 10U	4U
2			5U, 6U		7U
1				3U	4C, 8U, 9U, 13U
	1	2	3	4	5
	Impact				

Fall 2015 Kelvin Goode
PM 686B

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Risk, Lessons Learned & CO example

Change Request Form
Project Information
Project Title: Alaska Majestic Lodge Project — Project Number: 001
Project Manager: Kelvin Goode

Section 1: Change Request
Requester Name: Kelvin Goode — Date of Request: 11/15/2014 — Change Request Number: 005
Requester Phone: 907-952-1805
Item to be Changed: Cost of project — Priority(1-5): 5
Description of Change: After conducting a more in depth Rough Order of Magnitude Estimate the anticipated cost will increase.
Estimated Cost & Time: The anticipated costs go from $680,000 to $2,350,000

Section 2: Change Evaluation
Evaluated by: Brett Goode — Work Required: Perform a more detailed cost estimate.
What is Affect: Overall cost increase, decrease in risk exposure
Impact to Cost, Schedule, Scope, Quality, and Risk: Cost increase of $1,670,000. Schedule, scope, quality did not change. Cost related risk exposure went way down.

Section 3: Change Resolution
Accepted X — Approved by (Print): Brett Goode — Signature: Brett Goode — Date: 11-17-14
Rejected
Comments:

Section 4: Change Tracking
Completion Date — Completed by (Print): — Signature: — Date:
Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Fall 2015 Kelvin Goode
PM 686B

AML Risk Analysis

Risk #	Risk Event	Consequence	Qualitative Analysis	Risk Response	Contingency Response/Action	Probability (1-5)	Impact (1-5)	Score (Imp*Prob)	Ranking
4	Projected Business ROI and profitability do not meet expectations of the project sponsors.	Could lead to re-working of business plan or delaying of projected business initiation timeline.	This risk realized possesses potential to terminate or delay the business launch.	Mitigate	Include Cost Benefit Analysis in business plan and report feasibility with each business plan submission for approval.	1	5	5	5

Lesson Learned #	Life Cycle Process	Category Area of Knowledge	Issue Category	Problem/Success	Impact	Recommendation for Future	Performance Metric In Use for Lesson Category	Performance Metric Recommended in Future for Lesson Category	Response Method Elicited	Date
8	Planning	Risk Management	Incident Reporting	Was not applying dates for when risks were	Unknown when the risk was realized.	Apply a date section on the risk analysis document	Lessons Learned Reporting	Continued use of lessons learned	Continue with Risk Analysis and backdate unknown items	4/8/2015

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Discuss the usefulness in these templates helping to track and monitor the project and how these contribute to the body of knowledge.

Lessons learned, changes and wpi were the metrics used to convey project information to the sponsors and advisors.

Opportunities for Funding

Fall 2015, Kelvin Goode
PM 686B

This slide is dedicated to delivering information regarding what fruits AML hopes to produce with regards to funding.

The total capital required for start-up and operation is estimated to be $2,350,000. AML will seek $160,000 of mortgage debt to procure the land and $2,190,000 through debt financing. The interest rate is expected to be 7-12% for the mortgage debt and 2-5% for debt financing.

AML Competitor Overview

Stakeholder	Website	Price ($/person) Double Occupancy Room
Tikchik lake lodge	http://www.tikchiklodge.com/travel-information	$ 8,300
Ultima Thule Lodge	http://www.ultimathulelodge.com/rates	$ 7,900
Blue Mountain Lodge	http://www.bluemountainlodge.com/fishing/open-dates-pricing	$ 5,500
Wildman Lake Lodge	http://www.wildmanlodge.com/request.php	$ 7,500
Crystal Creek Lodge	http://www.crystalcreeklodge.com/rates/	$ 10,400
Epic Angling & Adventure, LLC	http://www.epicanglingadventure.com/alaska-wilderness-safari/safari-trip-info/#	$ 6,650
Painter Creek Lodge	http://www.paintercreeklodge.com/rates.php	$ 6,600
Lake Clark Inn	http://www.lakeclark.com/lodge/packages-rates	$ 7,200
Grizzly Skin Lodge	grizskins@att.net	$ 3,900
Tierra Patagonia	http://www.tierrahotels.com/en-us/tierra-patagonia-hotel-boutique-amp-spa/rates.htm	$ 5,100
Average Cost per Week		**$ 6,905**
Median Cost per Week		**$ 6,925**

Fall 2015, Kelvin Goode
PM 686B

Understanding the competition that operate successfully and what their rates are provide indications for pricing parameters and sales projections.

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Alaska Majestic Lodge

Compressed Income Statement

Calendar Years (2016-2017)

	2016	2017	2018	2019
Revenue	$ 4,831,502	$ 5,314,652	$ 5,846,117	$ 6,430,729
COGS	$ 1,663,601	$ 1,829,962	$ 2,012,958	$ 2,214,253
Gross Profit	$3,167,900	$3,484,690	$3,833,159	$4,216,475
Gross Margin (%)	66%	66%	66%	66%
Operating Expense	$ 585,778	$ 614,155	$ 645,817	$ 680,856
Net Operating Income	$2,582,123	$2,870,536	$3,187,343	$3,535,619
Net Profit Margin (%)	53%	54%	55%	55%
Cash At End of Period	$ 1,904,857	$ 4,242,016	$ 6,768,837	$ 9,518,381

Fall 2015, Kelvin Goode
PM 686B

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*make note on the change from when we started to now with the may to september. State we initially thought we would end in september, but research indicated that some lodges run into october.

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Mt. Peulik, 4,836 ft
North View

Quyana!

(Thank You!)
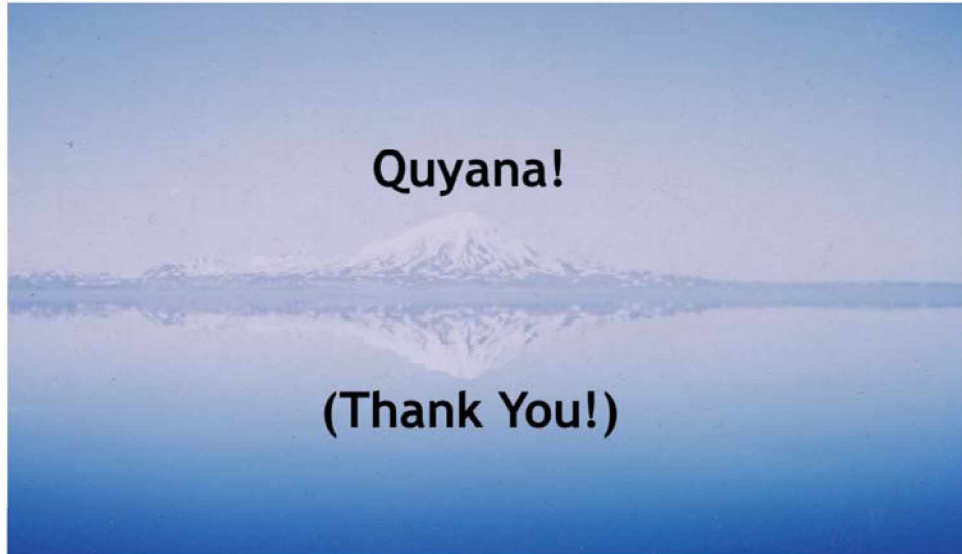
Lessons Learned Narrative
Alaska Majestic Lodge Project

The Alaska Majestic Lodge (AML) Project came with many successes and failures. Of the risks and opportunities that were cataloged, more risks were cataloged than opportunities. Forward thinking indicates that it is likely that once the construction of the lodge initiates more opportunities will be logged. A lesson is an activity that you do in order to learn something. (Merriam-Webster, 2015) The act of performing this project was the largest lesson for the project manager.

The cataloging of lessons learned was selected as one of the projects key performance indicators. This quality metric contributed to more than normal forward thinking as a result of reflection through hindsight of project successes and failures. Seventeen lessons learned were gathered during the project lifecycle. The first ten of the lessons learned were focused either on the initiating or planning project life cycle with the other seven being occurring during the executing or closing lifecycle of the project.

Several lessons learned were captured during PM 686A and PM 686B. Lessons learned were cataloged in nearly all ten Project Management Institute knowledge areas. Some of the lessons resulted in a development of new methodologies that were implemented in work practices. Others resulted in recommendations and templates to use that could impact future projects. The most interesting lesson I learned between PM 686A and PM 686B was how traceability exists between lessons learned, risks, and any knowledge area that lesson event was logged on. Understanding that there was traceability lead to tracking it. The effort put forth in tracking the traceability between knowledge areas allowed for a more thorough understanding of the intricacies between the "cause" and the "effect" of risk events and how those events impacted the project's success as well as the knowledge retention of the project manager.

The lessons learned category that delivered the highest value was lessons to do with scope. The largest undocumented realized risk encountered thus far had to do with over scoping. The project started in the fall of 2014 with end deliverables that included a business plan, design plan and construction management plan. Hundreds of hours was spent on the planning effort for construction. Dozens of those hours spent directly interfacing with sponsors. That realized risk event had a traumatic effect on meeting success criteria and was definitely a hard lesson to learn. The result of that event contributed to the decision to defer and extend PM 686A scope into the spring of 2015. Although it was a disappointment having to defer, the effects of over scoping provided additional time and valuable experience to understanding the importance of identifying tangible project and product ideas and outcomes.

Prior to the project execution a strengths, weaknesses, opportunities, threats (SWOT) analysis was conducted on the project team by the project manager. The SWOT analysis allowed for the team to realistically review their strengths and weaknesses. It provided the verification needed to understand where work packages would be subcontracted downstream. Also, understanding more about the constraints, assumptions and how they impact the project manager's capabilities aided in developing a more structured implementation strategy for the many scope items that were identified. A great question asked before starting was, "have I thoroughly assessed assumptions, constraints, and my capabilities?" More often or not, the majority tend forget the self-capability assessment and to jump straight in to the work. It was understood that in doing that, we might miss out on the opportunity to provide a product of the highest quality. The results from conducting an in depth and iterative SWOT analysis may have yielded information that could have aided in developing a more realistic approach in pursuing scope in the fall of 2014.

Over scoping had a pancake effect on other project related tasks later in the project. Tasks such as developing and following the project schedule resulted with work quality below what I would typically produce. As we all know, having a schedule is one thing, following a schedule is another issue. This an issue that I am still encountering all the way at the end of the project. I developed a baseline schedule, but it was insufficient for all that I wanted to accomplish and did not do a very good job of capturing required work. This led to an ad hoc pursuit in completing and submitting deliverables, ultimately leading to the deferral option for the fall of 2014. Not following the schedule, as I've found, results in a procrastination of efforts and lessened quality of workmanship.

Another contribution to lessons learned was with regards to ensuring traceability between documents. Some documents have direct links to one another. The project charter, scope statement and project management plan are a good example of this. I found that I would sometimes update the scope, project management plan or charter and not

update the corroborating documents. This played a big role in loss of time as I spent time trying to identify what was the most up to date document. In one case I submitted an older version of work without knowing it because I forgot to update corroborating documents. It was required to spend several hours combing through the documents to find discrepancies which allowed for an accurate update of all documents such that equilibrium of information was evident throughout the project. After this trial, any time changes to documents were made a new copy was saved with the new dated version and the changes were immediately reflected in the corroborating documents.

One persistent problem experienced was that sometimes great questions would pop up while working, but documentation of those questions was forgotten. Lack of documentation with regards to questions or clarification requests had an impact on project outcomes in terms of issue identification and resolution. Addressing questions and documenting them provided answers for this project and future projects. A questions log contributes to successful contributions to lessons learned knowledge and is also a great tool to have when conducting stakeholder outreach and communication. Possessing questions prior to a meeting allows for the project manager to maximize the value that can be attained from input of advisors and sponsors.

Regarding travel related risks a very valuable lesson learned is to conduct an assessment on what project management needs might be required when traveling remotely or away from home. Create a checklist to mock that. There were a few incidents where I was remote and not equipped with a particular tool and thus did not possess capability to complete work in that area. I was able to focus on other work, but the fact that the tool was forgotten led to me not being able to complete some work.

One issue encountered was that a risk analysis tool was created and was not used to its maximum potential. The primary reason for this was that the risks were supposed to directly link with work packages in the work break down structure, which did not get completed until nearly the end of the spring semester of 2015. This is an example of what happens when there is a traceability breakdown between related knowledge areas.

Another problem encountered was that I did not correlate my actual hours worked to the schedule until late in project. Realizing the importance of this, I created an activity log and every time work is completed, the time started and time completed is tracked. This activity log is really helpful in two ways, it helped in furnishing motivation and also provided data on what work was completed. This contributed to identifying the work performance index.

Through the PM 686A and PM 686B process I have gathered insight and experience. Hindsight is 20/20 for the future. I enjoyed the Project Management program and feel that PM 686A/PM 686B process lives up to the expectation of being a great method to demonstrate what we're made of and how capable we are at performing work and meeting timelines. If I could go through the process again, the top three things I would do differently are:

1. Create the work break down structure early in the project and update weekly.
2. Keep a communications log.
3. Implement PERT Analysis.

The Top five Recommendations for future PM 686A/686B Students:

1) Set a timeline and stick to it. This is important beyond measure, procrastination is to a successful project as rotten fruit is to our health. Use the schedule as the tool it is, when it is cast aside it is of no use and cannot perform its intended purpose of reporting anticipated key dates.
2) It is advised that future students perform a capability analysis on the project team. A strengths, weaknesses, opportunities, threats (SWOT) analysis was performed prior to ensuing on this project.
3) Start thinking about projects to pursue around PM 603. Document any projects that possess potential for an interesting opportunity long before initiating 686A. If there are issues, conduct a SWOT on a project specific basis.
4) Use an activity log to document hours worked and what work packages were associated with that work. This can be very good information to track as it allows for a more in depth opportunity to conduct PERT analysis.
5) Highly suggest establishing traceability between: risks, lessons learned, scope changes, and work packages. Understanding event traceability contributes to a higher understanding of the interconnections between knowledge areas.

Alaska Majestic Lodge Project Critical Knowledge Areas

Selection of 3-4 Knowledge Areas used during project to demonstrate mastery, how they will be applied to the project and how performance will be measured.

Scope Management

The metric selected to monitor and report scope performance was logging controlled changes vs. uncontrolled changes with listed impacts held against scope, time, cost and quality. The costs will only impact the financial section of the business plan as there were no costs associated with the project. Monitoring controlled vs. uncontrolled change relate to risk, quality and time management and it is important to demonstrate that traceability of cause and effect between the selected metrics. The output of the change management plan is an accepted and approved change to the project. Any change request requires inputs from risk or quality to move forward with approval. This pertains to all project changes outside user requested changes.

The scope management knowledge area has been a useful area in the planning of the project as it requires the project manager to consider how the performance and planning of work will affect the overall success of the project in terms of delivering a tangible product that is also acceptable. Had this knowledge area not been selected, the project manager would have been creating work non-pertinent to achieving the goals set forth by the owner. "Don't boil the ocean"-LuAnn Piccard. This knowledge area has allowed for an assessment to take place prior to planning. Thus far, there have been eight approved project changes. Overall there were twelve approved changes. Refer to the change management plan for more information.

Risk Management (Deferred as Knowledge Area to Executing, Monitoring and Controlling and Closing Project Lifecycle)

The metric selected to monitor and report risk performance was the number of identified risks vs. the number of unidentified risks. Risk reporting shall take place at each PPM update and the impacts those risks have on Scope, Quality and Schedule shall be addressed.

Project risk was used as a knowledge area until March 11th. It was decided then to defer this knowledge area to PM 686B as the risks on the planning side of the project mostly relate to risks external to project activities. Risks of this stature are mostly uncontrolled in nature. Risks such as starting a new job or the passing of a family relative. They are risks that were realized and impacted the project in some way with regards to time, scope and quality.

The risk management section worked will in the PM 686B scope. This section of the work entailed larger degree of risk and can be noticed if looking at the late execution through closing lifecycle. Overall there were seven documented or controlled risks and fourteen undocumented or uncontrolled risks that were realized.

Quality Management

The metric selected to monitor and report quality performance was the listing of at least three lessons learned. The lessons learned shall be broken down by knowledge area and recommendations for mitigation measures shall be supplied to prevent that issue from occurring in similar projects in the future. This metric was selected as it works well with the Plan, Do, Check, Act methodology. Thus far, seventeen lessons learned have been logged. Of those logged, several have impacted the project in ways that required the project manager to change project direction or management methods.

Time Management

The metric selected to monitor and report schedule performance was a work performance index (WPI) with a threshold set from 0.90 to 1.10. Overall the project is sitting at WPI of 1.01 and an SPI of .65. Slipped tasks shall be monitored and address impacts on scope, risk or quality. Thus far, the time management knowledge area has been the least used area. In using the lessons learned metric from the quality knowledge area, this was identified and SPI

was changed to WPI. With the work performance index, an activity log was generated and any work conducted on the project is cataloged, allowing for accurate reporting with regards to time spent.

After the development of the activity log, more time was spent developing an approach used in determining the sequencing and duration of scheduled work. The largest issue identified with regards to time management concerns its relation to risk management. During the course of planning this project, a few uncontrolled risk events external to the project took place that aided in temporarily inhibiting project progress. The largest of which being the acceptance of a new position as a project engineer for an Anchorage construction firm. The act of balancing work and schooling deliverables proved more difficult than anticipated. Had more time been spent in delivering a time management plan of sufficient quality it is probable that the act of completing work tasks would have been timelier.

Project Management Plan
Alaska Majestic Lodge Project

Table of Contents

Project Objectives

The objective of the project is to deliver a final business plan of the proposed Alaska Majestic Lodge business. The business plan should provide the steps necessary to successfully saturate the market for sport fishing and tour guiding in the Becharof National Wildlife Refuge. Through this endeavor, the Project Manager shall demonstrate his knowledge and mastery of project management principles via demonstration of understanding the project management knowledge areas of Scope Management, Time Management, Risk Management and Quality Management.

Project Justification

The Alaska Visitor Statistics program has shown that since 2012 a 7% increase in tourist volume has been realized in Southwest Alaska. The increase in added volume contributed an additional $4 million to total the visitor industry spending impact, which came to $120 million. Considering most villages in southwest Alaska do not possess the infrastructure to support tourism, the majority of the economic impact was seen in the lodging industry.
The area of interest for the proposed project is in the Becharof National Wildlife Refuge. There are no wilderness resorts in the refuge, ensuring a competitive edge in the market. The sponsors have conducted preliminary evaluation and found that lending institutions for a project of this stature are willing to provide funding after the property is procured. Comparing competition in the region, the benefits far outweigh the costs of operation.

Project Strategy

The project manager's strategy will include: researching other operations similar, researching economic viability, incorporating sponsor and personal experience, and iterative consultations with subject matter experts. This strategy shall enable the project manager to identify critical success factors, approval authority expectations and deliverable acceptance criteria.

Stakeholder Identification and Analysis

The stakeholder identification and analysis tool is designed to assist in the process of identifying stakeholders of whom which possess an interest in the outcome of the project and have the ability to impact the project in some way.

When soliciting responses from stakeholders it critical that the project manager incorporate four steps into the interviewing techniques. These techniques are:

1. Listen
2. Understand
3. Clarify Stakeholder Needs
4. Implement solutions

Information gathered through the use of stakeholder engagement includes, but is not limited to: stakeholder concerns, stakeholder expectations, project success and acceptance criteria, product success and acceptance criteria, and information pertinent to the development of project methodologies, tools and action plans to be utilized in the project.

The incorporation of the tactics listed above are what contributed to the information in the Stakeholder Analysis document. Refer to the Stakeholder Analysis document for more information.

Project:	Alaska Majestic Lodge Project	Back to Table of Contents			
Project Sponsor:	Brett, Lucy, Kelvin Goode				
Project Manager	Kelvin Goode				

Date:	2015.12.05						
Revision:	7						
AML Stakeholder Register and Analysis							
PID#Alaska Majestic Lodge Project	**Identification Information**						
Stakeholder	**Organization**	**Org. Position**	**Title**	**Location**	**Role**	**Contact Information**	**Website**
Internal Stakeholders (internal to performing organization)							
Roger Hull	University of Alaska Anchorage	Upwards	Acedemic Advisor (Primary)	Anchorage	MSPM Academic Advisor	rkhull@uaa.alaska.edu ; 907-786-1923	http://www.uaa.alaska.edu/collegeofengineering/programs/pm/index.cfm
LuAnn Piccard	University of Alaska Anchorage	Upwards	Acedemic Advisor	Anchorage	MSPM Academic Advisor	Lpiccard@uaa.alaska.edu ; (907) 786-1917	http://www.uaa.alaska.edu/collegeofengineering/programs/pm/index.cfm
Jim Bates	University of Alaska Anchorage	Upwards	Acedemic Advisor	Anchorage	MSPM Academic Advisor	jlbates@go-big.com	http://www.uaa.alaska.edu/collegeofengineering/programs/pm/index.cfm
Brett Goode	Alaska Majestic Lodge	Upwards	AML Director of Operations	King Salmon	Sponsor, Final Authority	blgalaska@yahoo.com	n/a
Lucy Goode	Alaska Majestic Lodge	Upwards	AML Director of Strategy and Marketing	King Salmon	Sponsor, Final Authority	lasg20@yahoo.com	n/a
Kelvin Goode	Alaska Majestic Lodge	Upwards	AML Project Manager and sponsor	3421 East 42nd Ave. Apt. 102 Anchorage, AK 99508	Final Authority	(907) 952-1805; kagoode@alaska.edu	n/a
Sharilyn Mumaw	UAA Institutional Revew Board (IRB)	Upwards	IRB Research Evaluation Director	UAA	Research Final Authority	simumaw@uaa.alaska.edu	http://www.uaa.alaska.edu/research/ric/irb/
External Stakeholders (external							

to performing organization)							
General Public	Public	Outwards	Customers	Anywhere	Clientele	n/a	n/a
Susan Alexander	Becharof National Wildlife Refuge	Upwards	Manager	Post Office Box 277 4 Bear Road King Salmon, Alaska 99613	Permit Authority	Phone: (907) 246-3339 Fax: (907) 246-6696	http://www.fws.gov/refuge/Becharof/About/Contact_Us.html
Antone Togiak	U.S. Department of the Interior, Bureau of Indian Affairs	Upwards	Realty Specialist	Real Estate Services Alaska Regional Office 3601 "C" Street, Suite 1100 Anchorage, AK 99503-5947	Native Realty Specialist	(907) 271-1621; Fax (907) 271-2998; Toll Free (800) 645-8465; antone.togiak@bia.gov	http://www.bia.gov/WhoWeAre/RegionalOffices/Alaska/index.htm
City of Egegik	City of Egegik	Outwards	Closest City	Egegik, AK	Local Governing Authority	907-233-2231	n/a
Bob Williams	Becharof Corporation	Outwards	President	Egegik, AK	Influential Local Native Corporation	egegikbob@hotmail.com	n/a
Alaska Department of Fish & Game	Alaska Department of Fish & Game	Upwards	Local Governing Authority	1255 W 8th St, Juneau, AK 99802	Federal Governing Authority	(907) 465-4100	http://www.adfg.alaska.gov/
Bryan Reid, Sr.	Pioneer Log Homes of B.C.	Outwards	President	351 Hodgson Road Williams Lake BC V2G 3P7 Canada	Log Home Contractor	(250) 392-5577; Fax (250) 392-5581; toll free 1-877-822-5647; sales@pioneerloghomesofbc.com	www.pioneerloghomesofbc.com
Gary Crosina	Pioneer Log Homes of B.C.	Outwards	Sales/Marketing Manager	351 Hodgson Road Williams Lake BC V2G 3P7 Canada	Log Home Contractor	(250) 392-5577; Fax (250) 392-5581; toll free 1-877-822-5647; cell (250) 398-0795 sales@pioneerloghomesofbc.com	www.pioneerloghomesofbc.com
Mr. TW Patch	Regulatory Commission of Alaska	Upwards	Construction Permit Approval Authority	701 West Eighth Avenue, Suite 300 Anchorage, Alaska 99501-3469	State Permit Approval Authority	Phone: (907) 276-6222 Fax: (907) 276-0160 Email: tw.patch@alaska.gov	http://rca.alaska.gov/RCAWeb/home.aspx
Alaska Communication	Alaska Communication	Outwards	Communication Provider	600 Telephone Ave. Anchorage,	Communication Vendor	http://www.alaskacommunications.com/About-ACS.aspx	http://www.alaskacommunications.com/

Service	Service			AK 99503			
Lake and Peninsula Borough	Lake and Peninsula Borough	Upwards	Construction Permit Approval Authority	P.O. Box 495, King Salmon, Alaska 99613	Local Governing Authority	(800) 764-3421	http://www.lakeandpen.com/
Paul Boskoffsky	Majestic Fishing	Outwards	Region Elder	P.O. Box 408 Naknek, AK 99633	Region Elder	(907) 246-4459; pnboskoffsky@hotmail.com	n/a
Potential Non-Profit Opportunities							
Katie's Krops	Katie's Krops	Outwards	Non-Profit Outreach	Nationally	Potential Non-Profit partner	Katie Stagliano Address: P.O. Box 1841 Summerville, SC 29484-1841 ; katie@katieskrops.com ; 843-327-3366	http://www.katieskrops.com/
Bristol Bay Native Corporation Education Foundation	BBEDC	Outwards	Non-Profit Outreach	Bristol Bay Building on C st.	Potential Non-Profit partner	111 West 16th Avenue, Suite 400 Anchorage, AK 99501	http://www.bbnc.net/index.php/our-education-foundation

Exhibit I. Stakeholder Register

Scope Statement

Opportunity Statement

An opportunity exists that allow for the business owners and project sponsors to deliver an Alaskan experience that prospective clientele will find memorable, exciting and unique. If the operation is conducted as planned, the owners may provide up to two hundred people unforgettable experiences that can be treasured and shared.

This lodge is located on Becharof Lake on the Alaskan Peninsula. The lodge establishment will be the only 100% Alaskan Native owned lodge in Southwest Alaska and the only establishment of its kind in the region. In the summer of 2011, over 48,000 people visited the southwest region. Not including travel, those tourists contributed nearly $84.8 million to the region's economy. AML's potential market share would amount to $1.8 million per year.

This project scope statement will define the boundaries of the AML Project. The project concerns the planning, development and delivery of the AML business plan. The project planning is expected to be completed by April 27, 2015. The business plan delivery date is expected to be December 2, 2015. It is estimated that no expenses shall be incurred during this project, however operational financial planning shall be incorporated into the project.

Product Description

AML will offer sport fishing, wildlife viewing, hiking, and educational teachings about the area, environment, and people. There will be six double occupancy rooms for visitors, two four-bed cabins for staff and a main lodge with

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the kitchen, lounge and office. The lodge manager will also act as winter man for the facility in the off-season. All labor will be seasonal.

Business Mission:

AML's mission is to promote goodwill, understanding and respect among the various cultural communities of the world.

Business Vision:

AML's vision is to preserve, protect and inspire humanities understanding of and respect for nature so as it remains intertwined in the fabric of modern society.

Business Goals include:

1. Provide product that promotes the Natural World and the betterment of human character.
2. Provide a product that exhibits first class resort sport fishing, wildlife viewing, and other recreational activities that utilize the regions resources and conform to Alaska Visitor Statistics Program most enjoyed activities experienced by tourists.
3. Provide product that educates clientele protecting and preserving of the natural environment.

Project Description

The AML Project is proposed to research sport fishing markets in Southwest Alaska. The output of the research will be a business plan with analysis which will deliver recommendations on how to approach establishing and operating a successful sport fishing lodge in Southwest Alaska. The business plan shall conform to the requirements and expectations set forth by project oversight approval authorities. Refer to the Project Charter for additional information regarding project oversight approval authorities.

Project Deliverables

The project scope shall deliver a 100% completed business plan no later than November 27, 2015. The AML project management plan shall consult of and incorporate Project Management Institute (PMI) methodologies throughout the project lifecycle. The AML project management plan shall address the following life cycle topic areas, management plans and documents:

Project Initiation

Project Charter
Stakeholder Assessment & Analysis
Project Success & Acceptance Criteria
Scope Statement & Initial Project Requirements

Project Planning

Project Document Integration
Scope Development & Change Management Planning
WBS Development
Schedule Planning
Quality Planning
Risk Identification, Analysis and Response Planning

Project Execution

Stakeholder Engagement

Metrics Utility and Accuracy Reporting

Business Plan must be ready to distribute. The information in the business plan shall address the following:
1. Executive Summary
2. Industry Analysis
   a. Industry overview
   b. Competitors
   c. Current Target market
3. Company
   a. Concept
   b. Product/Service
   c. Our Target Market
   d. Why we are unique
   e. Company Structure
4. Market & Sales
   a. Target market
   b. How will we attract our customers
   c. Marketing Channels
   d. Website and social media
5. Operations
   a. Service
   b. Company Capabilities
   c. Competitive Advantage
6. Management & Ownership
   a. Management Team
   b. Gaps in team
   c. Board of Advisors
7. Critical Risks
   a. Potential risks and risk responses
8. Financials
   a. Capital
   b. Overview of Financials
   c. Strategic Plan
9. Appendix
   a. Marketing Channels
   b. Financials
   c. Milestones
   d. Loan Entities-Anchorage Area

Project Monitoring & Controlling

KPI and PMP validation
Status, Forecast and Progress reporting
Change Management Verification and Assessment

Project Closure

Transition to Operations Planning
Project Records, Documentation Control and Administrative Closeout Implementation
Project Narrative and Final Project Report
Project Management Maturity Assessment and Application
Organizational Process Assets and Enterprise Environmental Factors Analysis

Project Debriefing
Lessons Learned & Root Cause Analysis
Research Methods, Surveys and Data Analysis
100% Project Delivery and Sponsor Acceptance Document

Project Includes
PM 686A -Development of Stakeholder Identification and Analysis -Development of Risk Identification and Analysis tool -Development of overall project schedule -Monitoring of Work Performance -Development of Project Management Plan -Development of Research Methods, Surveys and Research Data Analysis PM 686B -100% Complete Business Plan -Development of list of Approved Vendors and Funding Agencies -100% Complete Project Management Plan

Assumptions

- Proposed project is approved by Institutional Review Board (IRB).
- Business- future southwest state tourism revenues for sport fishing and tourism do not decline.
- Technology- Use of alternative technology will accommodate the mission of the lodge and contribute to long term cost savings.
- Resources- Project team working on project are qualified to do so.
- Schedules- Time allotted for business plan development in PM 686B is enough time to deliver product.

Constraints

- Time-the business planning timeframe:
  - Project Management Plan must be completed by April 10, 2015.
  - Business Plan must be completed by November 27, 2015.
- Budget-No capital is currently allotted for planning and executing project.
- Location-the location is remote. The site is only accessible by float plan or small skiff in the summer season. This will add difficulty in designing the business plane as operation logistics are complex.
- Requirements in PM 686A and 686B Syllabus must be completed within the allotted time frame.
- Human Resources-Limited number of resources to accomplish planning of the business plan.

Critical Success Factors

- Meet the deliverables in the allotted time as shown in the schedule.
- Report progress at milestones using selected performance metrics.
- Pass PM 686A with marks no less than a "B" grade as indicated in the Syllabus.
- Lessons learned incorporated in plan development
- Project manager performs effective stakeholder management
- Institutional Review Board (IRB) Approves Project

Acceptance Criteria

- Deliverables are posted on time.
- Deliverables posted are complete.

- Research package posted to IRB is complete.
- Deliverables posted meet quality requirements.
- Business Plan submissions are sponsor approved.

Project Milestones

PM 686A Milestone/Deliverable	Target Date
686A PPM #01 Required Deliverables Submitted	01/30/2015
686A PPM #02 Required Deliverables Submitted	02/20/2015
686A PPM #03 Required Deliverables Submitted	03/13/2015
686A PPM #04 Required Deliverables Submitted	04/10/2015
686A Research Proposal posted to IRB	04/10/2015
686A Oral Defense Presented	04/20/2015
686A Final Planning Required Deliverables & PMP Submitted	04/28/2015
PM 686B Milestone/Deliverable	**Target Date**
686B PPM #01 Required Deliverables Submitted	09/18/2015
686B PPM #02 Required Deliverables Submitted	10/10/2015
65% Business Plan Submitted	10/30/2015
686B PPM #03 Required Deliverables Submitted	11/07/2015
95% Business Plan Submitted	11/20/2015
686B PPM #04 Required Deliverables Submitted	11/27/2015
100% Business Plan Submitted	11/27/2015
686B Final Oral Defense Presented	12/02/2015
686B Project Final Required Deliverables Submitted	12/07/2015

Exhibit II. Milestone List

Project Technical Requirements

Alaska Majestic Lodge Project		Requirements Documentation		
Kelvin Goode				
PM 686A Spring 2015				
Stakeholder	**Requirement Description**	**Category**	**Priority**	**Acceptance Criteria**
Brett Goode	Project Plan must include a list of risks and risk response measures for business plan	Risk	1	Risk reporting includes controlled risks vs. uncontrolled risks and their impact on project scope, schedule or quality

Brett Goode	Business Plan must include sections that define who our target market is and strategies we will use to reach our target market	Scope	3	Research methods include market segmentation and at least three types of consumers and consumer markets
Brett Goode	Project Plan must include a lessons learned package that can be used when designing and constructing lodge	Quality	2	At least three lessons learned are reported at each milestone or phase gate with actions taken and recommendations on how to avoid repeating issue in future
Brett Goode	Business Plan must include sections that cover who we are, why we're unique, and how we aim to contribute a best value experience via services offered	Stakeholder	3	Sponsors require no less than bi-weekly engagements on this issue. Each engagement requires cataloging and reporting new information back to sponsors
Lucy Goode	Business Plan must include section for how AML will contribute to charity	Scope	3	Each milestone or phase gate requires reporting a new method of how AML can give back to community. If no methods are generated, explanation why is required.
Lucy Goode	Business Plan must include Strategic Initiative Plan that outlines our business goals and objectives	Integration	3	Sponsors require no less than bi-weekly engagements on this issue. Each engagement requires cataloging and reporting new information back to sponsors
Lucy Goode	Project must include quality plan that allows for Sponsor to view progress so that input/feedback may be provided on tangible outcomes and deliverables	Metrics	5	Metrics Management Plan shall include Key Performance Indicators that be included at project updates or sponsor meetings
Lucy Goode	The business plan must include a customer retention plan	Stakeholder	3	Sponsors require no less than bi-weekly engagements on this issue. Each engagement requires cataloging and reporting new information back to sponsors
MSPM Committee	Stakeholder outreach must be sufficient enough to produce a list of requirements that create tangible outcomes	Stakeholder	5	Stakeholder engagement iterations logged and resulting scope changes are captured via change management process
MSPM Committee	Deliverables are complete, on time and within scope	Quality	5	Number of work packages completed vs. work packages not completed with respect to planned completion and how non completion impacts project
MSPM Committee	Work Break down structure includes all of the work and only the work	Scope	5	WBS iterations with each PPM and
MSPM Committee	Fully automated schedule conforms to milestone and delivery dates	Time	5	SPI reporting with each PPM. Threshold set to .90 SPI

MSPM Committee	Must be able to demonstrate understanding of and traceability between selected knowledge areas	Metrics	5	Knowledge Area impact assessment with each PPM
MSPM Committee	Product must be able to contribute back to the body of knowledge	Integration	3	End product is a template for future business planners
Sharilyn Mumaw	Student Project must comply with IRB requirements as listed on UAA Institutional Review Board homepage.	Scope	5	IRB requirements met and approved by IRB before deadline indicated on IRB website

Exhibit III. Requirements Matrix

Project Limits & Exclusions

Anything else not mentioned in the scope statement is excluded from the project. The Project Manager is granted unilateral control over project activities and is approved to request, analyze and approve project changes.

Work Break-Down Structure

Alaska Majestic Lodge Project Plan

Initiating
- Submit MSPM
- Graduate Studies Plan
- Define Business Opportunity
- Develop Project Charter
- Update Project Charter
- Develop Project Plan Abstract
- Update Project Plan Abstract

Left margin milestones:
- 686A PPM #01 Required Deliverables Submitted
- 686A PPM #02 Required Deliverables Submitted
- 686A PPM #03 Required Deliverables Submitted
- Required Research Submitted to Institutional Review Board
- 686A PPM #04 Required Deliverables Submitted
- Milestone 686A Oral Defense Presented
- Milestone 686A Required Final Deliverables & PMP Submitted
- 686B PPM #01 Required Deliverables Submitted
- 686B PPM #02 Required Deliverables Submitted
- 686B PPM #03 Required Deliverables Submitted
- 686B PPM #04 Required Deliverables Submitted
- 686B Final Oral Defense Presented
- 686B Final Project Required Deliverables Submitted

Planning
- Create PMP Outline
- Create Final Project Report Outline

Develop Stakeholder Engagement Plan
- Gather Sponsor Support
- Gather Sponsor Expectations, Acceptance and Success Criteria
- Perform Sponsor Engagement
- Perform Sponsor Engagement
- Perform Sponsor Engagement
- Select MSPM Advisory Committee
- Gather Advisor Expectations, Success and Acceptance Criteria
- Perform Advisory Engagement
- Perform Advisory Engagement
- Perform Advisory Engagement
- Preliminary Stakeholder Analysis
- Update Stakeholder Analysis
- Update Stakeholder Analysis

Develop Scope Management Plan
- Preliminary Scope Statement
- Develop Initial Requirements Matrix
- Develop Preliminary Work Break Down Structure
- Update Work Break Down Structure
- Update Work Break Down Structure
- Create Deliverables List
- Create Change Management Plan

Develop Schedule Management Plan
- Develop Preliminary Schedule
- Develop Preliminary Milestone List
- Update Schedule
- Update and Finalize Schedule

Develop Metrics Management Plan
- Preliminary Knowledge Area Metrics Selection
- Update Knowledge Area Metrics
- Update Knowledge Area Metrics
- Create Metrics Management Plan
- Create Knowledge Area Metrics for Execution through Closing

Develop Communication Management Plan
- Establish Communication Protocols
- Create Communications Plan

Develop Financial Management Plan
- Conduct ROM Cost Analysis

Develop Human Resource Management Plan
- Preliminary Human Resource Analysis
- Develop Organization Chart(s)

Develop Risk Management Plan
- Create Risk Register
- Perform Risk Analysis
- Perform Risk Analysis

Develop Closeout Management Plan
- Revise Closeout Plan
- Draft PMP
- Revise PMP
- Finalize PMP and Submit for Approval
- Submit Final PMP and Project Narrative
- Create and Submit Project Presentation
- Conduct Oral Presentation

Research
- Establish UAA IRB Account & Create preliminary research methods
- Develop Preliminary Research Methods
- Complete IRB Training
- Update Research Methods
- Finalize Research Methods and Attain Advisor Approval
- Submit IRB Package for UAA Approval

Execution
- Verify Stakeholder Expectations, Acceptance and Success Criteria
- Executive Summary

Industry Analysis
- Industry overview
- Competitors
- Current Target market

Company
- Concept
- Product/Service
- Our Target Market
- Why we are unique
- Company Structure

Market & Sales
- Target market
- How will we attract our customers
- Marketing Channels
- Website and social media

Operations
- Service
- Company Capabilities
- Competitive Advantage

Management & Ownership
- Management Team
- Gaps in team
- Board of Advisors
- Critical Risks
- Potential risks and risk responses

Financials
- Capital
- Overview of Financials
- Strategic Plan

Appendix
- Marketing Channels
- Financials
- Milestones

Monitoring & Controlling
- Perform Change Control
- Verify & Control Scope
- Control Schedule
- Perform Quality Control
- Monitor & Control Risks
- Submit Performance Reports

Closing
- Draft Final Project Report
- Complete Final Project Report
- Log Lessons Learned
- Stakeholder Exit Interviews
- Administrative Close Out

Exhibit IV. Work Breakdown Structure

Refer to the WBS raw file for more information.

Time Management Plan

The time management plan is used to track, monitor and report on project progress as the project commences. Microsoft Project will be used as a software tool to produce a fully automated project schedule. The schedule possesses important dates for milestone deadlines, work task duration and task start dates, and actual work durations.

Refer to the schedule for more information.

Task Name	Duration	Work	Actual Work	Start	Finish	Actual Start	Predecessors	Resource Names	% Complete	Cost	Baseline Cost	Actual Cost	CPI	SPI

		k												
Alaska Majestic Lodge Project Plan	**231 days**	**427.2 hrs**	**427.2 hrs**	**Mon 1/19/15**	**Mon 12/7/15**	**Mon 1/19/15**			**100%**	**$427.19**	**$677.84**	**$427.19**	**1.03**	**0.65**
Initiating	**18 days**	**22 hrs**	**22 hrs**	**Mon 1/19/15**	**Wed 2/11/15**	**Mon 1/19/15**			**100%**	**$22.00**	**$22.00**	**$22.00**	**1**	**1**
Submit MSPM Graduate Studies Plan	1 day	2 hrs	2 hrs	Mon 1/19/15	Mon 1/19/15	Mon 1/19/15		KAG	100%	$2.00	$2.00	$2.00	1	1
Define Business Opportunity	3 days	4 hrs	4 hrs	Tue 1/20/15	Thu 1/22/15	Tue 1/20/15	16	KAG	100%	$4.00	$4.00	$4.00	1	1
Develop Project Charter	6 days	10 hrs	10 hrs	Fri 1/23/15	Fri 1/30/15	Fri 1/23/15	17	KAG	100%	$10.00	$10.00	$10.00	1	1
Update Project Charter	2 days	2 hrs	2 hrs	Tue 1/27/15	Wed 1/28/15	Tue 1/27/15	16	KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Project Plan Abstract	1 day	2 hrs	2 hrs	Fri 1/23/15	Fri 1/23/15	Fri 1/23/15	17	KAG	100%	$2.00	$2.00	$2.00	1	1
Update Project Plan Abstract	1 day	2 hrs	2 hrs	Wed 2/11/15	Wed 2/11/15	Wed 2/11/15	20	KAG	100%	$2.00	$2.00	$2.00	1	1
Planning	**71 days**	**189.37 hrs**	**189.37 hrs**	**Tue 1/20/15**	**Tue 4/28/15**	**Tue 1/20/15**			**100%**	**$189.36**	**$157.84**	**$189.36**	**0.83**	**1**
Create PMP Outline	4.13 days	2 hrs	2 hrs	Tue 1/27/15	Mon 2/2/15	Tue 1/27/15	18	KAG	100%	$2.00	$2.00	$2.00	1	1
Create Final Project Report Outline	1 day	2 hrs	2 hrs	Tue 1/27/15	Tue 1/27/15	Tue 1/27/15	18	KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Stakeholder Engagement Plan	**32 days**	**23.37 hrs**	**23.37 hrs**	**Tue 1/20/15**	**Wed 3/4/15**	**Tue 1/20/15**			**100%**	**$23.36**	**$23.36**	**$23.36**	**1**	**1**
Gather Sponsor Support	1 day	2 hrs	2 hrs	Tue 1/20/15	Tue 1/20/15	Tue 1/20/15	16	KAG	100%	$2.00	$2.00	$2.00	1	1
Gather Sponsor Expectations, Acceptance and Success Criteria	1 day	1.03 hrs	1.03 hrs	Wed 1/28/15	Wed 1/28/15	Wed 1/28/15	26	KAG	100%	$1.04	$1.04	$1.04	1	1
Perform Sponsor Engagement	1 day	1.03 hrs	1.03 hrs	Wed 2/4/15	Wed 2/4/15	Wed 2/4/15	27	KAG	100%	$1.04	$1.04	$1.04	1	1
Perform Sponsor Engagement	1 day	1.03 hrs	1.03 hrs	Wed 2/18/15	Wed 2/18/15	Wed 2/18/15	28	KAG	100%	$1.04	$1.04	$1.04	1	1

Task	Duration	Work	Actual Work	Start	Finish	Baseline Finish	Predecessors	Resource Names	% Comp.	Cost	Baseline Cost	Actual Cost		
Perform Sponsor Engagement	1 day	1.03 hrs	1.03 hrs	Wed 3/4/15	Wed 3/4/15	Wed 3/4/15	29	KAG	100%	$1.04	$1.04	$1.04	1	1
Select MSPM Advisory Committee	1 day	1.03 hrs	1.03 hrs	Fri 1/23/15	Fri 1/23/15	Fri 1/23/15	17	KAG	100%	$1.04	$1.04	$1.04	1	1
Gather Advisor Expectations, Success and Acceptance Criteria	1 day	1.03 hrs	1.03 hrs	Tue 1/27/15	Tue 1/27/15	Tue 1/27/15	31	KAG	100%	$1.04	$1.04	$1.04	1	1
Perform Advisory Engagement	1 day	1.03 hrs	1.03 hrs	Wed 1/28/15	Wed 1/28/15	Wed 1/28/15	32	KAG	100%	$1.04	$1.04	$1.04	1	1
Perform Advisory Engagement	1 day	1.03 hrs	1.03 hrs	Tue 2/10/15	Tue 2/10/15	Tue 2/10/15	33	KAG	100%	$1.04	$1.04	$1.04	1	1
Perform Advisory Engagement	1 day	2 hrs	2 hrs	Tue 2/24/15	Tue 2/24/15	Tue 2/24/15	34	KAG	100%	$2.00	$2.00	$2.00	1	1
Preliminary Stakeholder Analysis	3 days	8 hrs	8 hrs	Fri 1/23/15	Tue 1/27/15	Fri 1/23/15	17	KAG	100%	$8.00	$8.00	$8.00	1	1
Update Stakeholder Analysis	1 day	2 hrs	2 hrs	Wed 2/4/15	Wed 2/4/15	Wed 2/4/15	36	KAG	100%	$2.00	$2.00	$2.00	1	1
Update Stakeholder Analysis	1 day	1.03 hrs	1.03 hrs	Wed 2/18/15	Wed 2/18/15	Wed 2/18/15	37	KAG	100%	$1.04	$1.04	$1.04	1	1
Develop Scope Management Plan	**15 days**	**26.08 hrs**	**26.08 hrs**	**Fri 1/23/15**	**Thu 2/12/15**	**Fri 1/23/15**			**100%**	**$26.08**	**$26.08**	**$26.08**	**1**	**1**
Preliminary Scope Statement	2 days	6 hrs	6 hrs	Fri 1/23/15	Mon 1/26/15	Fri 1/23/15	17	KAG	100%	$6.00	$6.00	$6.00	1	1
Develop Initial Requirements Matrix	3 days	4 hrs	4 hrs	Tue 2/10/15	Thu 2/12/15	Tue 2/10/15	40	KAG	100%	$4.00	$4.00	$4.00	1	1
Develop Preliminary Work Break Down Structure	1 day	4 hrs	4 hrs	Fri 1/23/15	Fri 1/23/15	Fri 1/23/15	17	KAG	100%	$4.00	$4.00	$4.00	1	1
Update Work Break Down Structure	1 day	1.03 hrs	1.03 hrs	Wed 2/4/15	Wed 2/4/15	Wed 2/4/15	42	KAG	100%	$1.04	$1.04	$1.04	1	1
Update Work Break Down Structure	1 day	1.03 hrs	1.03 hrs	Thu 2/5/15	Thu 2/5/15	Thu 2/5/15	43	KAG	100%	$1.04	$1.04	$1.04	1	1

Task	Duration	Work1	Work2	Start	Finish	Baseline	Pred	Resource	%	Cost1	Cost2	Cost3	ID1	ID2
Create Deliverables List	1 day	2 hrs	2 hrs	Tue 2/3/15	Tue 2/3/15	Tue 2/3/15	42	KAG	100%	$2.00	$2.00	$2.00	1	1
Create Change Management Plan	3 days	8 hrs	8 hrs	Tue 1/27/15	Thu 1/29/15	Tue 1/27/15	40	KAG	100%	$8.00	$8.00	$8.00	1	1
Develop Schedule Management Plan	**8 days**	**7.03 hrs**	**7.03 hrs**	**Tue 1/27/15**	**Thu 2/5/15**	**Tue 1/27/15**			**100%**	**$7.04**	**$7.04**	**$7.04**	**1**	**1**
Develop Preliminary Schedule	1 day	2 hrs	2 hrs	Tue 1/27/15	Tue 1/27/15	Tue 1/27/15	18	KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Preliminary Milestone List	1 day	1.03 hrs	1.03 hrs	Tue 1/27/15	Tue 1/27/15	Tue 1/27/15	18	KAG	100%	$1.04	$1.04	$1.04	1	1
Update Schedule	1 day	2 hrs	2 hrs	Wed 2/4/15	Wed 2/4/15	Wed 2/4/15	48	KAG	100%	$2.00	$2.00	$2.00	1	1
Update and Finalize Schedule	1 day	2 hrs	2 hrs	Thu 2/5/15	Thu 2/5/15	Thu 2/5/15	50	KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Metrics Management Plan	**38 days**	**6.17 hrs**	**6.17 hrs**	**Tue 1/27/15**	**Thu 3/19/15**	**Tue 1/27/15**			**100%**	**$6.16**	**$6.16**	**$6.16**	**1**	**1**
Preliminary Knowledge Area Metrics Selection	1 day	1.03 hrs	1.03 hrs	Tue 1/27/15	Tue 1/27/15	Tue 1/27/15	18	KAG	100%	$1.04	$1.04	$1.04	1	1
Update Knowledge Area Metrics	1 day	1.03 hrs	1.03 hrs	Tue 2/3/15	Tue 2/3/15	Tue 2/3/15	53	KAG	100%	$1.04	$1.04	$1.04	1	1
Update Knowledge Area Metrics	1 day	1.03 hrs	1.03 hrs	Tue 2/24/15	Tue 2/24/15	Tue 2/24/15	54	KAG	100%	$1.04	$1.04	$1.04	1	1
Create Metrics Management Plan	1 day	1.03 hrs	1.03 hrs	Thu 2/5/15	Thu 2/5/15	Thu 2/5/15	53	KAG	100%	$1.04	$1.04	$1.04	1	1
Create Knowledge Area Metrics for Execution through Closing	1 day	2 hrs	2 hrs	Thu 3/19/15	Thu 3/19/15	Thu 3/19/15	56	KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Communication Management Plan	**14 days**	**2.08 hrs**	**2.08 hrs**	**Wed 1/28/15**	**Mon 2/16/15**	**Wed 1/28/15**			**100%**	**$2.08**	**$2.08**	**$2.08**	**1**	**1**
Establish Communication Protocols	1 day	1.03 hrs	1.03 hrs	Wed 1/28/15	Wed 1/28/15	Wed 1/28/15	32	KAG	100%	$1.04	$1.04	$1.04	1	1

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Task	Duration	Work	Work	Start	Finish	Baseline	#	Resource	%	Cost	Cost	Cost		
Create Communications Plan	2 days	1.03 hrs	1.03 hrs	Fri 2/13/15	Mon 2/16/15	Fri 2/13/15	59	KAG	100%	$1.04	$1.04	$1.04	1	1
Develop Financial Management Plan	**1 day**	**1.03 hrs**	**1.03 hrs**	**Mon 1/26/15**	**Mon 1/26/15**	**Mon 1/26/15**			**100%**	**$1.04**	**$1.04**	**$1.04**	**1**	**1**
Conduct ROM Cost Analysis	1 day	1.03 hrs	1.03 hrs	Mon 1/26/15	Mon 1/26/15	Mon 1/26/15	42	KAG	100%	$1.04	$1.04	$1.04	1	1
Develop Human Resource Management Plan	**4 days**	**3.03 hrs**	**3.03 hrs**	**Fri 1/23/15**	**Wed 1/28/15**	**Fri 1/23/15**			**100%**	**$3.04**	**$3.04**	**$3.04**	**1**	**1**
Preliminary Human Resource Analysis	1 day	1.03 hrs	1.03 hrs	Fri 1/23/15	Fri 1/23/15	Fri 1/23/15	17	KAG	100%	$1.04	$1.04	$1.04	1	1
Develop Organization Chart(s)	1 day	2 hrs	2 hrs	Wed 1/28/15	Wed 1/28/15	Wed 1/28/15		KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Risk Management Plan	**8 days**	**4.08 hrs**	**4.08 hrs**	**Fri 1/23/15**	**Tue 2/3/15**	**Fri 1/23/15**			**100%**	**$4.08**	**$4.08**	**$4.08**	**1**	**1**
Create Risk Register	1 day	2 hrs	2 hrs	Fri 1/23/15	Fri 1/23/15	Fri 1/23/15	17	KAG	100%	$2.00	$2.00	$2.00	1	1
Perform Risk Analysis	2 days	1.03 hrs	1.03 hrs	Mon 2/2/15	Tue 2/3/15	Mon 2/2/15	67	KAG	100%	$1.04	$1.04	$1.04	1	1
Perform Risk Analysis	1 day	1.03 hrs	1.03 hrs	Mon 2/2/15	Mon 2/2/15	Mon 2/2/15		KAG	100%	$1.04	$1.04	$1.04	1	1
Develop Closeout Management Plan	2 days	2 hrs	2 hrs	Wed 3/18/15	Thu 3/19/15	Wed 3/18/15	68	KAG	100%	$2.00	$2.00	$2.00	1	1
Revise Closeout Plan	2 days	1.03 hrs	1.03 hrs	Wed 3/25/15	Thu 3/26/15	Wed 3/25/15	70	KAG	100%	$1.04	$1.04	$1.04	1	1
Draft PMP	5 days	16 hrs	16 hrs	Mon 3/9/15	Fri 3/13/15	Mon 3/9/15	23	KAG	100%	$16.00	$16.00	$16.00	1	1
Revise PMP	3 days	8 hrs	8 hrs	Wed 3/25/15	Fri 3/27/15	Wed 3/25/15	72	KAG	100%	$8.00	$8.00	$8.00	1	1
Finalize PMP and Submit for Approval	3 days	24 hrs	24 hrs	Mon 3/30/15	Wed 4/1/15	Mon 3/30/15	73	KAG	100%	$24.00	$24.00	$24.00	1	1
Submit Final PMP and	1 day	1.03 hrs	1.03 hrs	Tue 4/28/1	Tue 4/28/1	Tue 4/28/1	74	KAG	100%	$1.04	$1.04	$1.04	1	1

Project Narrative				5	5	5								
Create and Submit Project Presentation	5 days	24 hrs	24 hrs	Thu 4/2/15	Wed 4/8/15	Thu 4/2/15	74	KAG	100%	$24.00	$24.00	$24.00	1	1
Conduct Oral Presentation	1 day	0.48 hrs	0.48 hrs	Mon 4/20/15	Mon 4/20/15	Mon 4/20/15	76	KAG	100%	$0.48	$0.48	$0.48	1	1
Research	**28 days**	**35.92 hrs**	**35.92 hrs**	**Wed 2/18/15**	**Fri 3/27/15**	**Wed 2/18/15**			100%	**$35.92**	**$4.40**	**$35.92**	**0.12**	**1**
Establish UAA IRB Account & Create preliminary research methods	3 days	0.48 hrs	0.48 hrs	Wed 2/18/15	Fri 2/20/15	Wed 2/18/15	46	KAG	100%	$0.48	$0.48	$0.48	1	1
Develop Preliminary Research Methods	5 days	2 hrs	2 hrs	Mon 2/23/15	Fri 2/27/15	Mon 2/23/15	79	KAG	100%	$2.00	$2.00	$2.00	1	1
Complete IRB Training	5 days	32 hrs	32 hrs	Mon 3/9/15	Fri 3/13/15	Mon 3/9/15	79	KAG	100%	$32.00	$0.48	$32.00	0.01	1
Update Research Methods	5 days	0.48 hrs	0.48 hrs	Mon 3/16/15	Fri 3/20/15	Mon 3/16/15	81	KAG	100%	$0.48	$0.48	$0.48	1	1
Finalize Research Methods and Attain Advisor Approval	0.06 days	0.48 hrs	0.48 hrs	Mon 3/23/15	Mon 3/23/15	Mon 3/23/15	82	KAG	100%	$0.48	$0.48	$0.48	1	1
Submit IRB Package for UAA Approval	1 day	0.48 hrs	0.48 hrs	Fri 3/27/15	Fri 3/27/15	Fri 3/27/15	83	KAG	100%	$0.48	$0.48	$0.48	1	1
Execution	**198 days**	**109.5 hrs**	**109.5 hrs**	**Tue 1/20/15**	**Thu 10/22/15**	**Tue 1/20/15**			100%	**$109.50**	**$240.00**	**$109.50**	**0.9**	**0.41**
Verify Stakeholder Expectations, Acceptance and Success Criteria	1 day	3 hrs	3 hrs	Fri 9/4/15	Fri 9/4/15	Fri 9/4/15	77FS+98 days	KAG	100%	$3.00	$3.00	$3.00	1	1
Status Update For Advisory Committee and Peers	1 day	2 hrs	2 hrs	Fri 9/4/15	Fri 9/4/15	Fri 9/4/15	84	KAG	100%	$2.00	$2.00	$2.00	1	1
Update Change Control Process	1 day	1 hr	1 hr	Tue 1/20/15	Tue 1/20/15	Tue 1/20/15	87	KAG	100%	$1.00	$1.00	$1.00	1	1
Update	1 day	2 hrs	2 hrs	Wed	Wed	Wed	88	KAG	100%	$2.00	$2.00	$2.00	1	1

Task Name	Duration	Work	Actual Work	Start	Finish	Baseline	ID	Resource	% Comp.	Cost	Baseline Cost	Actual Cost		
Project Management Plan				1/21/15	1/21/15	1/21/15								
Report Risk	1 day	1 hr	1 hr	Thu 1/22/15	Thu 1/22/15	Thu 1/22/15	89	KAG	100%	$1.00	$1.00	$1.00	1	1
Project Deliverables Status Update	1 day	1 hr	1 hr	Fri 1/23/15	Fri 1/23/15	Fri 1/23/15	90	KAG	100%	$1.00	$1.00	$1.00	1	1
Data Collection/Research Update	1 day	1 hr	1 hr	Mon 1/26/15	Mon 1/26/15	Mon 1/26/15	91	KAG	100%	$1.00	$1.00	$1.00	1	1
Draft Project Report	**4 days**	**5 hrs**	**5 hrs**	**Tue 1/27/15**	**Fri 1/30/15**	**Tue 1/27/15**	**92**		**100%**	**$5.00**	**$34.00**	**$5.00**	**0.4**	**0.06**
Update Abstract	1 day	2 hrs	2 hrs	Tue 1/27/15	Tue 1/27/15	Tue 1/27/15	92	KAG	100%	$2.00	$2.00	$2.00	1	1
Update Research Sources and Key Words	1 day	1 hr	1 hr	Wed 1/28/15	Wed 1/28/15	Wed 1/28/15	94	KAG	100%	$1.00	$0.00	$1.00	0	0
Update Table of Contents	1 day	1 hr	1 hr	Thu 1/29/15	Thu 1/29/15	Thu 1/29/15	95	KAG	100%	$1.00	$0.00	$1.00	0	0
Submit Project Progress Status Update	1 day	1 hr	1 hr	Fri 1/30/15	Fri 1/30/15	Fri 1/30/15	96	KAG	100%	$1.00	$0.00	$1.00	0	0
Update Project Management Plan	1 day	2 hrs	2 hrs	Mon 2/2/15	Mon 2/2/15	Mon 2/2/15	97	KAG	100%	$2.00	$2.00	$2.00	1	1
Develop Business Plan	**188 days**	**91.5 hrs**	**91.5 hrs**	**Tue 2/3/15**	**Thu 10/22/15**	**Tue 2/3/15**			**100%**	**$91.50**	**$193.00**	**$91.50**	**0.92**	**0.44**
Executive Summary	1 day	2.5 hrs	2.5 hrs	Tue 2/3/15	Tue 2/3/15	Tue 2/3/15	98	KAG	100%	$2.50	$1.00	$2.50	0.4	1
Industry Analysis	**5 days**	**12 hrs**	**12 hrs**	**Tue 9/8/15**	**Mon 9/14/15**	**Tue 9/8/15**			**100%**	**$12.00**	**$12.00**	**$12.00**	**1**	**1**
Industry overview	1 day	4 hrs	4 hrs	Tue 9/8/15	Tue 9/8/15	Tue 9/8/15	100	KAG	100%	$4.00	$4.00	$4.00	1	1
Competitors	2 days	4 hrs	4 hrs	Wed 9/9/15	Thu 9/10/15	Wed 9/9/15	102	KAG	100%	$4.00	$4.00	$4.00	1	1
Current Target market	2 days	4 hrs	4 hrs	Fri 9/11/15	Mon 9/14/15	Fri 9/11/15	103	KAG	100%	$4.00	$4.00	$4.00	1	1
Company	**7 days**	**19 hrs**	**19 hrs**	**Tue 9/15/15**	**Wed 9/23/15**	**Tue 9/15/15**			**100%**	**$19.00**	**$19.00**	**$19.00**	**1**	**1**
Concept	1 day	4 hrs	4 hrs	Tue 9/15/1	Tue 9/15/1	Tue 9/15/1	104	KAG	100%	$4.00	$4.00	$4.00	1	1

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				5	5	5								
Product/Service	2 days	6 hrs	6 hrs	Wed 9/16/15	Thu 9/17/15	Wed 9/16/15	106	KAG	100%	$6.00	$6.00	$6.00	1	1
Our Target Market	2 days	4 hrs	4 hrs	Fri 9/18/15	Mon 9/21/15	Fri 9/18/15	107	KAG	100%	$4.00	$4.00	$4.00	1	1
Why we are unique	1 day	2 hrs	2 hrs	Tue 9/22/15	Tue 9/22/15	Tue 9/22/15	108	KAG	100%	$2.00	$2.00	$2.00	1	1
Company Structure	1 day	3 hrs	3 hrs	Wed 9/23/15	Wed 9/23/15	Wed 9/23/15	109	KAG	100%	$3.00	$3.00	$3.00	1	1
Market & Sales	**5 days**	**14 hrs**	**14 hrs**	**Thu 9/24/15**	**Wed 9/30/15**	**Thu 9/24/15**			**100%**	**$14.00**	**$12.00**	**$14.00**	**0.86**	**1**
Target market	1 day	4 hrs	4 hrs	Thu 9/24/15	Thu 9/24/15	Thu 9/24/15	110	KAG	100%	$4.00	$3.00	$4.00	0.75	1
How will we attract our customers	2 days	4 hrs	4 hrs	Fri 9/25/15	Mon 9/28/15	Fri 9/25/15	112	KAG	100%	$4.00	$4.00	$4.00	1	1
Marketing Channels	1 day	3 hrs	3 hrs	Tue 9/29/15	Tue 9/29/15	Tue 9/29/15	113	KAG	100%	$3.00	$3.00	$3.00	1	1
Website and social media	1 day	3 hrs	3 hrs	Wed 9/30/15	Wed 9/30/15	Wed 9/30/15	114	KAG	100%	$3.00	$2.00	$3.00	0.67	1
Operations	**4 days**	**9 hrs**	9 hrs	**Thu 10/1/15**	**Tue 10/6/15**	Thu 10/1/15			**100%**	$9.00	$8.00	$9.00	0.89	1
Service	2 days	5 hrs	5 hrs	Thu 10/1/15	Fri 10/2/15	Thu 10/1/15	115	KAG	100%	$5.00	$4.00	$5.00	0.8	1
Company Capabilities	1 day	2 hrs	2 hrs	Mon 10/5/15	Mon 10/5/15	Mon 10/5/15	117	KAG	100%	$2.00	$2.00	$2.00	1	1
Competitive Advantage	1 day	2 hrs	2 hrs	Tue 10/6/15	Tue 10/6/15	Tue 10/6/15	118	KAG	100%	$2.00	$2.00	$2.00	1	1
Management & Ownership	**7 days**	**11 hrs**	11 hrs	**Wed 10/7/15**	**Thu 10/15/15**	Wed 10/7/15			**100%**	$11.00	$58.00	$11.00	0.91	0.17
Management Team	1 day	2 hrs	2 hrs	Wed 10/7/15	Wed 10/7/15	Wed 10/7/15	119	KAG	100%	$2.00	$2.00	$2.00	1	1
Gaps in team	1 day	2 hrs	2 hrs	Thu 10/8/15	Thu 10/8/15	Thu 10/8/15	121	KAG	100%	$2.00	$2.00	$2.00	1	1
Board of Advisors	1 day	1 hr	**1 hr**	Fri 10/9/15	Fri 10/9/15	**Fri 10/9/15**	122	KAG	100%	**$1.00**	**$0.00**	**$1.00**	**0**	**0**
Critical	2 days	4 hrs	4 hrs	Mon	Tue	Mon	123	KAG	100%	$4.00	$4.00	$4.00	1	1

Risks				10/12/15	10/13/15	10/12/15								
Potential risks and risk responses	2 days	2 hrs	2 hrs	Wed 10/14/15	Thu 10/15/15	Wed 10/14/15	124	KAG	100%	$2.00	$2.00	$2.00	1	1
Financials	2 days	**12 hrs**	12 hrs	**Fri 10/16/15**	**Mon 10/19/15**	Fri 10/16/15			100%	$12.00	$37.00	$12.00	0.83	0.27
Capital	1 day	4 hrs	4 hrs	Fri 10/16/15	Fri 10/16/15	Fri 10/16/15	125	KAG	100%	$4.00	$2.00	$4.00	0.5	1
Overview of Financials	1 day	8 hrs	8 hrs	Mon 10/19/15	Mon 10/19/15	Mon 10/19/15	127	KAG	100%	$8.00	$8.00	$8.00	1	1
Appendix	2 days	**12 hrs**	12 hrs	**Wed 10/21/15**	**Thu 10/22/15**	Wed 10/21/15			100%	$12.00	$46.00	$12.00	1	0.26
Marketing Channels	1 day	4 hrs	**4 hrs**	Wed 10/21/15	Wed 10/21/15	**Wed 10/21/15**	128	KAG	100%	**$4.00**	**$4.00**	**$4.00**	**1**	**1**
Financials	1 day	8 hrs	8 hrs	Thu 10/22/15	Thu 10/22/15	Thu 10/22/15	130	KAG	100%	$8.00	$8.00	$8.00	1	1
Closing	**30 days**	**106.33 hrs**	**106.33 hrs**	**Tue 10/27/15**	**Mon 12/7/15**	**Tue 10/27/15**			100%	$106.33	$258.00	$106.33	1.52	0.63
Draft Final Project Report	**18 days**	**91 hrs**	**91 hrs**	**Tue 10/27/15**	**Thu 11/19/15**	**Tue 10/27/15**			100%	$91.00	$176.00	$91.00	0.88	0.45
Abstract	1.44 days	6 hrs	6 hrs	Tue 10/27/15	Wed 10/28/15	Tue 10/27/15	131	KAG	100%	$6.00	$8.00	$6.00	1.33	1
Introduction	1 day	12 hrs	12 hrs	Wed 10/28/15	Wed 10/28/15	Wed 10/28/15	134	KAG	100%	$12.00	$8.00	$12.00	0.67	1
Literature Review Results	2 days	14 hrs	14 hrs	Thu 10/29/15	Fri 10/30/15	Thu 10/29/15	135	KAG	100%	$14.00	$8.00	$14.00	0.57	1
Research Method/Approach	1 day	9 hrs	9 hrs	Thu 11/5/15	Thu 11/5/15	Thu 11/5/15	136	KAG	100%	$9.00	$8.00	$9.00	0.89	1
Results	2 days	12 hrs	12 hrs	Wed 11/11/15	Thu 11/12/15	Wed 11/11/15	137	KAG	100%	$12.00	$8.00	$12.00	0.67	1
Research Analysis	4 days	16 hrs	16 hrs	Fri 11/6/15	Wed 11/11/15	Fri 11/6/15	138	KAG	100%	$16.00	$8.00	$16.00	0.5	1
Conclusions	1 day	8 hrs	8 hrs	Fri 11/13/15	Fri 11/13/15	Fri 11/13/15	139	KAG	100%	$8.00	$8.00	$8.00	1	1
Recommendations for Future	1 day	4 hrs	4 hrs	Mon 11/16/15	Mon 11/16/15	Mon 11/16/15	140	KAG	100%	$4.00	$8.00	$4.00	2	1

Research														
References	1.5 days	6 hrs	6 hrs	Tue 11/17/15	Wed 11/18/15	Tue 11/17/15	141	KAG	100%	$6.00	$8.00	$6.00	1.33	1
Appendicies	2 days	4 hrs	4 hrs	Wed 11/18/15	Thu 11/19/15	Wed 11/18/15	142	KAG	100%	$4.00	$8.00	$4.00	2	1
Draft Presentation	2 days	4 hrs	4 hrs	Mon 11/23/15	Tue 11/24/15	Mon 11/23/15	143	KAG	100%	$4.00	$32.00	$4.00	8	1
Presentation Conducted	1 day	1 hr	1 hr	Wed 12/2/15	Wed 12/2/15	Wed 12/2/15	144	KAG	100%	$1.00	$8.00	$1.00	8	1
Log Lessons Learned	1 day	3 hrs	3 hrs	Thu 12/3/15	Thu 12/3/15	Thu 12/3/15	145	KAG	100%	$3.00	$6.00	$3.00	2	1
Stakeholder Exit Interviews	1 day	4 hrs	4 hrs	Mon 12/7/15	Mon 12/7/15	Mon 12/7/15	146	KAG	100%	$4.00	$6.00	$4.00	1.5	1
Administrative Close Out	1 day	3 hrs	3 hrs	Mon 12/7/15	Mon 12/7/15	Mon 12/7/15	147	KAG	100%	$3.00	$6.00	$3.00	2	1
Final Project Deliverables Submitted	1 day	0.33 hrs	0.33 hrs	Mon 12/7/15	Mon 12/7/15	Mon 12/7/15	147	KAG	100%	$0.33	$24.00	$0.33	72	1

Exhibit V. Schedule

Cost Management Plan

Outside the design of the Financial Plan of the business plan no costs are associated with this project. The Financial Plan is to project revenues and is strictly used for funding purposed only.

The AML project does not require human resources. As there is no need for human resources it is excluded from this project management plan.

Communication Management Plan

The purpose of the communications management plan is to ensure that project information is accurately transmitted in a form that is both timely and effective to stakeholders. It is expected that active communication between stakeholders will commence once the project has been executed. Communication during the kick off and planning of the project will be as needed in the development of the project management plan.

Communication with stakeholders internal to the project shall be conveyed in a series of face to face stakeholder outreach iterations as well as in the form of status, progress and forecasting briefings at milestone reviews. Communication with stakeholders external will be either through email or telephone.

For more information regarding communication preferences and records refer to the Stakeholder Analysis & Engagement document and Status Reports. Refer to Appendix E for more information regarding status updates.

Human Resource Management Plan

The AML project does not require human resources. As there is no need for human resources it is excluded from this project management plan.

Quality Management Plan

The quality management plan is split into three sections per PMI PMBOK. These are quality planning (QP), quality assurance (QA) and quality control (QC). Quality management has been selected by the project manager to be one of the three selected knowledge areas to monitor and report project progress. The selected metric is lessons learned reporting. It has been decided to submit at least three lessons learned with each project milestone deadline. To review the project lessons learned refer to the project's lessons learned repository.

During the quality planning process it has been determined that the primary method to monitor quality throughout the project's life cycle shall be the method of Plan, Do, Check, Act. This method is ideal for the scale of the project and dovetails well with the selected metric for quality management.

The Plan, Do, Check, Act method is expected to work well with the quality assurance aspect of the project during project execution. Utilization of Plan, Do, Check, Act with periodic lessons learned reviews will aid in identifying any project issues or risks prior to them being realized. It will also help in maintaining alignment between the business and project mission.

It is anticipated that the combination of the periodic lessons learned and the Plan, Do, Check, Act method allow for the project manager to verify scope, schedule, the quality of project deliverables and perform integrated quality control where needed. As the business plan is developed, the owners have also requested a cost-benefit analysis upon the delivery of the 35% business plan. This request will help in identifying the long range cost implications of attempts to launch this business.

Metrics Management Plan

Scope Management
The metric selected to monitor and report scope performance shall be logging controlled changes vs. uncontrolled changes with listed impacts held against scope, time and quality. Monitoring controlled vs. uncontrolled change relate to risk, quality and time management and it is important to demonstrate that traceability of cause and effect between the selected metrics. The output of the change management plan is an accepted and approved change to the project. Any change request requires inputs from risk or quality to move forward with approval. This pertains to all project changes outside user requested changes.

Quality Management
The metric selected to monitor and report quality performance shall be the listing of at least three lessons learned. The lessons learned shall be broken down by knowledge area and recommendations for mitigation measures shall be supplied to prevent that issue from occurring in similar projects in the future. This metric was selected as it works well with the Plan, Do, Check, Act methodology. Thus far, nine lessons learned have been logged. Of those logged, several have impacted the project in ways that required the project manager to change project direction or management methods.

Time Management
The metric selected to monitor and report schedule performance shall be a work performance index (WPI) with a threshold set from 0.90 to 1.10. Slipped tasks shall be monitored and address impacts on scope, risk or quality. Thus far, the time management knowledge area has been the least used area. In using the lessons learned metric from the quality knowledge area, this was identified and SPI was changed to WPI. With the work performance index, an activity log was generated and any work conducted on the project is cataloged, allowing for accurate reporting with regards to time spent.

After the development of the activity log, more time was spent developing an approach used in determining the sequencing and duration of scheduled work. The largest issue identified with regards to time management concerns its relation to risk management. During the course of planning this project, a few uncontrolled risk events external to the project took place that aided in temporarily inhibiting project progress. The largest of which being the

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acceptance of a new position as a project engineer for an Anchorage construction firm. The act of balancing work and schooling deliverables proved more difficult than anticipated. Had more time been spent in delivering a time management plan of sufficient quality it is probable that the act of completing work tasks would have been timelier.
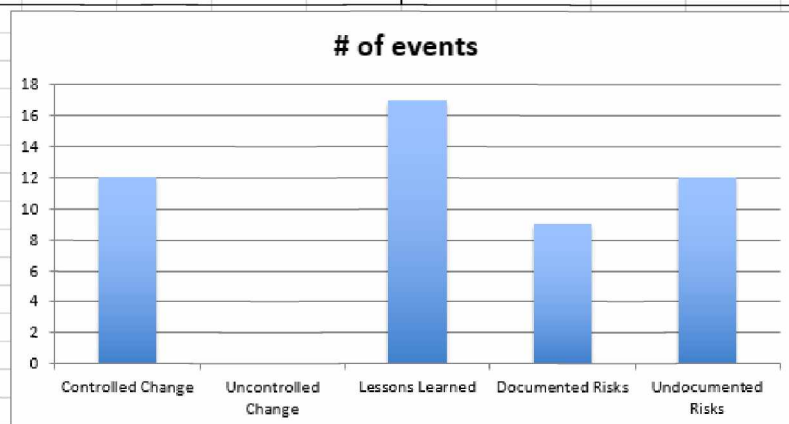
It is expected that the same knowledge areas will be utilized in the PM 686B portion of the project.

Alaska Majestic Lodge Project   **Performance Metrics Dashboard**   12/7/2015

Scope - # of Uncontrolled Changes vs. Controlled Changes	Risk - # of Uncontrolled Risks vs. Controlled Risks
0 vs. 12	12 vs. 9
Time - Work Performance Index	Quality - Lessons Learned Reporting
Soon to come	17

# of events

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Project Management Program, University of Alaska Anchorage   1

Exhibit VI. Metrics Dashboard

Alaska Majestic Lodge Project Lessons Learned Repository

Spring 2015, Kelvin Goode — Filter columns to capture data

Project Management Program, University of Alaska Anchorage

WBS #	Lesson Learned #	Life Cycle Process	Category Area of Knowledge	Issue Category	Problem/Success	Impact	Recommendation for Future	Performance Metric In Use for Lesson Category	Performance Metric Recommended in Future for Lesson Category	Response Method Elicited	Date of Occurance
	1	Planning	Risk Management	Equipment Difficency	Did not bring laptop equipped with MS Project or WBSChart Pro	Time - Could not work on Updating Schedule or Work Break Down Structure	Create List of Necessary Equipment and Software for Travel and incorporate into Travel	Work Performance Index	Continued use Work Performance Index	Work on task items outside Schedule	03/4/2015 to 3/9/2015
	2	Planning	Quality Management	Document Discrepancies	Did not ensure traceability between Scope Statement, Project Charter, and Project Management Plan	Time - Loss of at least 2 hours	Add column on Metrics Dashboard that queries if updates to corroberating documents have been executed	Lessons Learned Reporting	Continued use of Lessons Learned and incorporate weekly checklist of activities	Update Metrics Dashboard document	3/11/2015
	3	Planning	Time Management	Schedule Work Performance	Did not complete schedule until half way through semester	Quality - Work activities did not follow planned schedule and were adhoc, leaving incomplete or under quality work	Create schedule before work break down structure and convert schedule to WBS. Implement rule stating no work can be completed until schedule is completed.	Work Performance Index	Project Dependent. Work Performance Index or Schedule Performance Index	Update Schedule and Create Labor Analysis so that any time work is done hours are logged.	3/12/2015
	4	Planning	Communications Management	Questions.Clarifications.Request for Information (RFI) Tracking	Did not create a questions.clarifications.RFI repository early in project	Time, Quality - Lost track of some questions/clarifications and recommendations. Questions/Clarifications/RFI history could have helped in tracking project progress and changes	Create and use Questions/Clarifications/RFI repository earlier in project to help track communication and information flow	Lessons Learned Reporting	Continued use of lessons learned	Created Questions.Clarifications.RFI log	3/15/2015
	5	Planning	Time Management	Work Performance Index	Did not correlate actual hours worked to schedule until late in project.	Quality - Quality of workmanship and timely delivery of planned work tasks are not submitted in accordance to performance metrics	Use Labor Analysis Document to catalog any work and correlate those hours to the scheduled activities in the project schedule	Work Performance Index	Continued use of lessons learned and work performance index, use of this method shall allow for more accurate SPI reports	Continue with Labor analysis log	3/15/2015
	6	Planning	Risk Management	Lack of Applicability	Risk Management was not being used	Not much risk during project planning. Only two uncontrolled risks adversly affected either time or quality	Have Risk Management Plan aready created and integrated into documentation	Lessons Learned Reporting	Continued work with lessons learned and Risk Assessment and Analysis	Initiated change order to move Risk Management area of	3/23/2015
	7	Planning	Quality Management	Work Performance Index	Have not been identfying what PM Subsection is revised in PM Plan.	Proving how many hours were spent on each subsection is now impossible	When logging what document is worked on in WPI, list by subsection	Lessons Learned Reporting	Continued use of lessons learned and work performance index, use of this method shall allow for more accurate SPI	Continue with Labor analysis log and Lessons Learned Logging	4/7/2015
	8	Planning	Risk Management	Incident Reporting	Was not applying dates for when risks were realized.	Unknown when the risk was realized.	Apply a date section on the risk analysis document	Lessons Learned Reporting	Continued use of lessons learned	Continue with Risk Analysis and backdate	4/8/2015
	9	Planning	Time Management	Plan Effectiveness	Successful deomonstration of use of Quality Lesson Learned Reporting. Time Management Plan was not created until late in the project. After identifying this project methodology shifted	Positive & Negative, Activity Log was created and is being used as a motivation tactic and is used for actual work perfomed and for WPI calculation. There was substial time lost as a result of not creating the Time Management Plan early in the project.	Draft Project Management Plan First. Each subsidiary plan should be drafted in the project management plan and not in a separate location of the notebook, this leads to decentralization	Lessons Learned Reporting	Continue using Lessons learned, create metrics list template in future that allows for PM to identify acceptable progress metrics. Create time management metric that will actually be used by PM	Finish Project Schedule and continue with work on creating Time Management Plan	4/8/2015

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10	Executing	Time Management	Lost Time Outside Project	Was not able to secure lease for apartment or roommate before 09/01/2015.	Has had an impact of at minimum 3 hours per day.	N/A. Depends on future housing market.	Lessons Learned Reporting, Risk Tracking	n/a		Accept	9/1/2015
11	Executing	Time Management	Family Emergency	Close friend of family had a medical emergency.	Lost 4 days straight from 09/11-09/14. Also lost nearly 2 hrs per day 09/09 ,09/15, and 09/16.	Do not procrastinate on deliverables. Even though there may be more than enough time, risks can be realized that occupy all available time and energy.	Lessons Learned, Risk Tracking	n/a		Accept	9/9/2015
12	Executing	Time Management	Transportation Issue	Vehicle used for transportation from place of rest to school broke down.	Had nearly one week without vehicle, this lead to longer commutes by at least two hours per day.	n/a. Deal with as issues arise.	Lessons Learned, Risk Tracking	n/a		Accept	9/8/2015
13	Executing	Time Management	Technological Difficulties	Current Laptop is very slow and dies frequently.	Time lost is estimated at one to two hours per day.	Procure new equipment	Lessons Learned, Risk Tracking	n/a		Avoid, procured a new computer	9/17/2015
14	Executing	Stakeholder Management	Survey Interview	Did not cast net wide enough when selecting similar businesses to interview	Competition did not wish to engage. Did not capture data validating the literature review.	Cast net wide, select similar businesses outside their market that are in at least 4 regions	Risk Analysis, Lessons Learned	Risk Analysis, Lessons Learned		Accept	10/14/2015
15	Executing	Scope Management	Work Package Identification	Did not correctly estimate time requirements to complete work packages	The project report generation required three times the duration that was initially estimated	Spend more time on risk analysis and then work iteratively to ensure information is traced.	Lessons learned	Lessons learned, Risk Analysis		Accept	10/27/2015
16	Executing	Integration Management	Tardy Archival of information	Traceability of risk, work packages and lessons learned lost.	The wbs data that was corresponding the risk events and lessons learned has been lost resulting in quality reduction.	Incorporate PERT analysis into future schedules.	Risk Analysis, Lessons Learned	Risk Analysis, Lessons Learned		Accept	12/4/2015
17	Closing	Communications Management	Communication Log	Did not maintain an active communication log.	Lost data on number of stakeholder engagements	Create, use and maintain a communication log	Lessons Learned	Stakeholder Engagement requirement		Accept	12/5/2015

Exhibit VII. Lessons Learned Repository

Risk Management Plan

The purpose of the risk management plan is to document the processes tools and procedures that will be used to manage and respond to events that have positive or negative impacts on the AML project. This plan addresses the topics of:
- Risk Assessment & Analysis
- Risk Response Selection
- Risk Tracking & Reporting

Risks are identified as events that pose potential adverse impact to the projects planned activities from progressing as planned. Risks initially identified during the initiation process are known as the controlled risks. Risks identified during the project planning and executing process are to be added to the risk register as uncontrolled risks. Any risk added is to be evaluated regarding the potential for impact on the project. Refer to the AML Risk Analysis for more information regarding identifying and cataloging risk. The document allows for the cataloging of controlled and uncontrolled risks.

Risk assessment regards the determining of the probability that a risk will occur and the impact that the risk would have on the project, should it be realized. Selection of the probability and impact options that the risk will occur is measured on the Probability (1-5) and Impact (1-5) columns of the AML Risk Analysis document. The scoring follows as, 1 being least likely and 5 being most likely to occur. This provides the risk score and rating.

There are four risk responses:
1) Avoid
2) Accept
3) Mitigate

4) Transfer

It is expected that with each response selection a qualitative and, if required, quantitative analysis shall be performed. This analysis will help in assessing potential impacts on the project and also help in identifying a contingency response or action that occurs should that risk be realized.

The cataloging of planned and unplanned risks into the AML Risk Analysis document help in tracking and reporting on risks. It is expected that before PPM milestone deadlines the risks be reported in the status briefing. This is to occur in PM 686B. Refer to the Change Management Plan regarding the approved change of moving the risk knowledge area from the PM 686A timeline to the PM 686B timeline.

Project:	Alaska Majestic Lodge Project
Project Sponsor:	Brett, Lucy, Kelvin Goode
Project Manager	Kelvin Goode
Date:	2015.10.09
Revision:	4.0

Risk #	Risk Event	Consequence	Qualitative Analysis	Risk Respon	Contingency Response/Action	Probability (1-5)	Impact (1-5)	Score (Imp*Prob)	Ranking	Event	WBS ID#
					AML Risk Analysis						
				Documented/Accounted Risk							
1	Selected Metrics are not conducive to documenting actual performance.	May lead to not demonstrating a mastery of Project Management, lesser quality of deliverables submitted, more time spent delivering, and more costly.	The risk was realized in the Spring of 2015. The Risk analysis was not being used as much due to a minimized need.	Avoid	Change request was issued and approved to move the Risk management plan and area of knowledge to PM 686B. Refer to change management plan for more information.	4	5	20	1		
2	WBS does not encapsulate work required to complete project.	May lead to underperforming and submitting lower quality project deliverables and more time spent on corrective action.	This risk realized would require re-work and/or scope change.	Avoid	Meet with sponsors and discuss work packages and product requirements to receive clarification on project scope needs.	3	4	12	3		
3	Scope identified in beginning of project changes as project unfolds.	Consequence depends on elicited change. Some changes are necessary for project to be successful and valued by the end user.	This risk realized would require re-assessment of project direction and product requirement and a change request to the scope	Accept	Should a change be required, follow the procedures in the change management plan to accommodate the change.	5	1	5	5		
4	Projected Business ROI and profitability do not meet expectations of the project sponsors.	Could lead to re-working of business plan or delaying of projected business initiation timeline.	This risk realized possesses potential to terminate or delay the business launch.	Mitigate	Include Cost Benefit Analysis in business plan and report feasibility with each business plan submission for approval.	1	5	5	5		
5	Information gathered from similar businesses does not help project effort.	Could lead to re-focusing on some different aspect of the research, such as published reports and/or data, rather than interviewing.	This risk realized would impact the project with several hours of lost time. Add all hours used to talk wit sponsors, draft	Mitigate	Draft questions that addresses their vast knowledge of lessons learned and risks associated with an operation of their magnetude.	1	3	3	6		
6	Information to be gathered from similar businesses was gathered at a delayed date.	This may mitigate any solid data validating what's been reported with tourism agencies and state visitor statistics programs.	This risk realized would impact an opportunity to validate the research conducted via the internet and library search.	Avoid	Front load extra hours to ensure stakeholder outreach takes place.	5	3	15	2	######	
7	Data goals from verbal surveys were not able to be gathered.	The prospect of the business opportunity was validated due to the guarded or non-existent responses from lodge owners.	This risk entailed not receiving as much data as possible. Only one lodge owner of the five from the region was willing to respond, and	Accept	Catalog data, analyze and supply conclusions for the final report.	3	3	9	4	######	

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Risk Score & Urgency Matrix Waterfall

Prob	Threats				
5	3C		6C		1U, 12U
4		14U			1C
3			2C, 7C	2C, 10U	4U
2			5U, 6U		7U
1				3U	4C, 8U, 9U, 13U
	1	2	3	4	5
	Impact				

Exhibit VIII. Documented Risks & Waterfall Chart

Risk #	Risk Event	Consequence	Qualitative Analysis	Risk Response	Contingency Response/Action	Probability (1-5)	Impact (1-5)	Score (Imp*Prob)	Ranking	WBS ID#
					AML Risk Analysis					
					Undocumented/Unaccounted Risks					
1	Project Scope is not realistic with time alloted to complete work tasks.	Derail project progress and has adverse effects on schedule, scope, cost or quality of project deliverables.	This risk was realized in Fall 2014. It derailed the project's progress and required the PM to perform scope assessment and set realistic objectives to overcome risk realization.	Mitigate	De-scope using the change management plan and pursue project with added time in the next semester.	5	5	25	1	
2	Project Management Plan does not convey information conducive to the objectives set for the project.	Wordy PMP's consume PM's time and may convey as much information as a less wordy PMP.	This risk was realized in Fall 2014. The PMP had too much information and required more time to put together. The product of efforts were underquality and unfinished.	Avoid	Future Response is set to Avoid. Avoid by assessing what the end objective is, what information is required to meet that objective, and how delivering a plan that encapsulates that information so that persons unfamilar with the project can understand the project purpose and methods that will be used to meet deliverables set in the project's scope.	3	3	9	6	
3	Passing of Family Relative	Loss of time and focus on project deliverables	The risk was realized with the passing of the Project Manager's Great-Grandfather in the second week of February.	Accept	Scheduled work package tasks must be delayed. Time to work on project is expected to delay a minimum of 4-6 days during the week(s) of March 2/March 8	1	4	4	14	
4	Acceptance of New Job Position	Loss of momentum on meeting project deliverables.	Schedule to work on project will be changed due to learning curve for new position.	Accept	Shift daily schedule to accommodate new schedule.	3	5	15	3	
5	Traveling without proper software	Loss of time on meeting deliverables	Depending on duration of travel, impact on project activities vary.	Mitigate	Set work requiring software or equipment aside and work on other project activities	2	3	6	7	
6	Updated info document is not transferred to corroberating documents	Loss of time and re-work required	Extent of work depends on number of associated documents.	Mitigate	Create a column in Metrics Dashboard labor analysis that queries if corresponding documents are updated	2	3	6	8	
7	09/01/15. Not able to lease apartment or roommate before school	Loss of time	Lost 3 hours per day minimum.	Accept	Shift priorities to locate a home.	2	5	10	5	
8	09/09/15. Family Friend Health Emergency	Loss of time	Lost 4 days (11-14) and nearly 2 hours per day from September 9, 15-16	Accept	Shift priorities to be present at location for support	1	5	5	10	
9	09/08/15. No vehicle or transporation	Loss of time	Lost nearly one week of transportation before vehicle fixed	Accept	Ride bicycle or bus to school and apartments	1	5	5	11	
10	09/17/2015. Technological Difficulty	Loss of time	Current laptop being used is slow and dies frequently. Time lost is estimated to an hour per day.	Mitigate	Procured new computer Thursday.	3	4	12	4	
12	10/19/2015. Family Emergency	Loss of time	Grandma has congestive heart failure. Loses nearly 3 hours per day for four days.	Accept	Spend extra time working on weekends and how ever many hours are required to complete the work.	5	5	25	2	
13	11/05/2015. Injured Right Hand	Loss of time	Suffered symptoms similar to carpletunnel for nearly 4 days.	Accept	Ice and compression, spend time working on activities that do not require hands for work completion.	1	5	5	12	
14	11/13/2015. Friend in Paris Attacks	Reduction in quality of work and loss of time	She survived. Could not focus on school for three days. Missed November 13th class.	Accept	No response. Shift priority to health and wellness over deliverables until decompressed.	1	5	5	9	
15	12/04/2015. WBS ID# mixed up in Risk Analysis Tool	Loss of Quality	As the work packages did not match and it was unknown how long prior the error occurred.	Accept	Delete WBS ID#s and ensure future projects have risk incorporated PERT Analysis.	1	5	5	13	

Exhibit IX. Undocumented Risks

Procurement Management Plan

The AML project does not require procurement management. As there is no need for procurement it is excluded from this project management plan.

Project Closure Plan

The project closure plan is the final sequence of the project lifecycle. This is the stage where the project manager begins the process of conducting project stakeholder exit interviews and briefings and assesses the effectiveness of the project methodologies chosen for the project. This process occurs after 100% project delivery and sponsor acceptance. The general acceptance of the business plan is the trigger to initiate the process of project and administrative closeout.

Transition to Operations Planning

It is expected that the final product will be complete and professional enough to apply for funding. The hand off shall be a turn-key hand off.

Project Records, Documentation Control and Administrative Closeout Implementation

The project notebook has been created to catalog and archive documents generated though out the course of the project lifecycle. Once the Sponsor Acceptance Document is signed the administrative closeout and project records archival process shall be initiated.

Project Narrative and Final Project Report

The project narrative will be a characterize the size, complexity, technical challenge, environment, business drivers, assumptions, constraints, and other relevant aspects of the project that would be of benefit to teams considering adoption of the template for future projects. The narrative will include a set of searchable keywords, and a brief overview or "executive summary".

Project Management Maturity Assessment and Application

Project management maturity is to be evaluated at the conclusion of the project. Refer to the project management maturity document in Appendix for more information.

Organizational Process Assets and Enterprise Environmental Factors Analysis

A review of the OPA's and EEF's shall initiate during the closeout process. These can be found in Appendix with the project management maturity assessment.

Project Debriefing

The final stakeholder briefing shall take place in form of several briefing iterations with the sponsors and project advisors. Discussion items include: project successes, failures, lessons learned and any recommendations thereof, and reviews of the knowledge areas used in reporting progress. These briefings are to be cataloged in the communications folder after the information gathered is disseminated and implemented in form of recommendations within the lessons learned repository.

The discussions should include the following regarding success factors:

- Compare what you planned to accomplish to what you actually accomplished.
- Compare the planned duration to the actual duration.
- Compare the risk plan to the risk events.
- Compare the expected benefit to the actual benefit.
- Compare the original project plan to the processes actually needed to execute the project.
- Measures of Success
    - Were the metrics useful? Which ones would do better?
    - Did the project deliver the value expected?
    - Were relationships managed to the expectations of the stakeholders?
    - Was risk managed effectively?

Lessons Learned & Root Cause Analysis

- What worked?
- What didn't work?
- What was overlooked?
- What "course corrections" were needed?
- What should have been done differently?
- What would you do differently next time?

There are two components that form the lessons learned section:

1. The lessons learned template, which will be consulted at each meeting once project execution has kicked off. It is preferable and beneficial for a review of lessons learned at least conducted once per week.
2. The lessons learned repository is a database that encapsulates the project's lessons learned. This filterable database is equipped with searchable features for keywords and phrases. At the end of the project, all lessons learned that impacted the success or failure of the project shall be cataloged in the lessons learned repository.

The lessons learned narrative will be presented at the end of the project after several round table discussions about the project's successes, failures and recommendations for future action.

Research Methods, Surveys and Data Analysis

Were the research methods, surveys and data analysis adequate in terms of aiding in delivering a product of sufficient quality standards as set forth by the sponsors? Does the product and methods in delivering the product meet their expectations? Research methods shall be scrutinized in round table discussions regarding their effectiveness and applicability to the requirements set forth in the scope. Recommendations and lessons learned from this round table discussions shall be included in the project narrative at the end of the project. These documents shall be archived in the research folder of the project notebook.

100% Project Delivery and Sponsor Acceptance Document

Refer to Appendix C upon project completion for more information regarding sponsor acceptance.

Schedule Closeout

The project manager is to save and archive, via screen snapshot, the following actions regarding the MS Project schedule prior to final closeout:

Validate Changes
The project manager is to validate that all approved changes to the project schedule are reflected in the Performance Management Baseline (PMB)

Note Use Of

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Custom Fields, Calculated Fields, Modified Views, Modified Reports, Timeline Set-up, use of Add-In's, or other modifications and adaptations to MS Project.

Verify
All work packages in the schedule marked as complete are completed

Baseline
Identify the most recently established baseline (interim or original) to be used as the basis for a Tracking Gantt
Verify all resource assignments against actual resource usage

Final Gantt Chart
Create a final tracking Gantt Chart and produce a formatted, readable printed version of the data table, Timeline(s) and a properly scaled, complete Gantt Chart graphic
Document the basis for every start variance, task duration variance, and task cost variance in the Task Notes. Include reference to every realized risk and opportunity to ensure consistency with Risk Traceability

MS Project Configuration and Application
Identify and document the Backstage Options used in the MS Project Schedule during planning and execution of the project

Identify and Document
The use of Custom Fields, Calculated Fields, Modified Views, Modified Reports, Timeline Set-up, use of Add-In's, or other modifications and adaptations to MS Project. Include as assessment of the effectiveness and utility of those changes to the project file used to manage the project.

Note
File tab and options are backstage options.

Reports and Views
Create a Final Project Summary Report, Final Completed Tasks Report, Final Cash Flow Report, Final Earned Value Report, Final Resource Usage Report
Create the following Views and Graphics: Cash Flow Report, Earned Value Over Time Report, Resource Work Summary Report

Schedule Template
Create a MS Project template from the completed project schedule
Convert all identifiable resources to generic resource titles, normalize all labor rates, and delete all actual cost and actual progress data. Adjust all task durations to the most recent baseline or to original planned durations, depending upon the cause of any variances that occurred during execution.

Consolidated Schedule Closeout Document
Create a single, consolidated document containing all of the previously described elements as a MS Word file. Additional files may be embedded and linked; e.g., a MS Project file or template, Excel file, etc.

Process Improvement
Separately, create additions and improvements to this guideline for creating a closeout project schedule in MS Project.

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Document Edit History
Note: The contents of this plan are a "living document" and should be updated frequently

Creation or Modification Date	Creator/Editor (surname, given name)	Plan Section(s) Modified	Location of Saved File
12/09/2013	Goode, Kelvin	Created Document	Controlled Hard Drive
10/09/2014	Goode, Kelvin	Changed document from Project Life Cycle Process oriented to Management Area oriented	Controlled Hard Drive
04/10/2015	Goode, Kelvin	Document submitted for Advisory Approval	Controlled Hard Drive
12/05/2015	Goode, Kelvin	Document Submitted for Advisory Approval	Controlled Hard Drive

Exhibit X. Document Edit History

Project Change Management Plan
Alaska Majestic Lodge Project

January 26, 2015

Table of Contents

Introduction

This Change Management Plan was created for the Alaska Majestic Lodge (AML) Project in order to set expectations for what defines a change, how changes will be managed, the purpose and role of the change control board and the change management process. All stakeholders will be required to request or submit changes to the AML Project in accordance with this Change Management Plan. All requests and change submissions shall follow the process detailed herein.

Change Management Approach

The Change Management approach for the AML Project shall ensure that all proposed changes are properly defined, reviewed and agreed upon such that they are able to be properly implemented and communicated to all stakeholders. This process will ensure that the only changes to the project will be approved and cleared for implementation.

The Change Management approach consists of three areas:
- Ensure changes are within scope and beneficial to the project
- Determine how the change will be implemented
- Manage the change as it is implemented

The Change Management process has been created to ensure the Change Management approach is followed for all changes. By using this approach methodology, the AML Project Team will be able to prevent unnecessary change(s) from occurring and focus resources only on beneficial changes within the project scope.

Definitions of Change

There are several types of changes which may be requested and considered for the AML Project. Changes to project documentation shall be dependent on the extent and type of the proposed changes. Approved changes shall be communicated to all stakeholders. Types of changes include:

- Scheduling Changes: any changes that will impact the currently approved project schedule. These changes may require fast tracking, crashing, or re-baselining the schedule depending on the significance of the impact.
- Budget Changes: any changes which will impact the currently approved project budget. These changes may require requests for additional funding or adding to project or management reserves. May require changes to the cost baseline.
- Scope Changes: any changes which are necessary and impact the project's scope. These changes may also budget, schedule and quality. These changes may require revision to WBS, project scope statement, and other project documentation as necessary.

The project manager must ensure that any approved changes are communicated to the project stakeholders. As changes are approved, the project manager must ensure that the changes are recorded in the project documentation where necessary. These document updates must be communicated to the project team and stakeholders as well.

Change Control Board

The Change Control Board (CCB) is the approval authority for all proposed change requests pertaining to the AML Project. The purpose of the CCB is to review all change requests, determine their impacts on the project risk, scope, cost, schedule, quality and to approve or deny each change request. The following chart provides a list of the CCB members for the AML Project:

Name	Position	CCB Role
Lucy Goode	Owner, Vice President	CCB Chair
Brett Goode	Director of Facilities and Operations	CCB Co-Chair
Kelvin Goode	Owner, President	Project Manager, CCB Member

As change requests are submitted to the AML Project Manager by the project team/stakeholders, the Project Manager shall log the requests in the change log and the CCB will convene to review all change requests every Friday. For a change request to be approved, all CCB members must vote in favor. In the event more information is needed for a particular change request, the request will be deferred and sent back to the requestor for more information or clarification. If a change is deemed critical, an ad hoc CCB meeting can be called in order to review the change prior to the next scheduled weekly CCB meeting.

Roles and Responsibilities

The following are the roles and responsibilities for all change management efforts related to the AML Project:

Project Sponsor:
- Approve all changes to budget/funding allocations
- Approve all changes to schedule baseline
- Approve any changes in project scope
- Chair the CCB

Project Manager:
- Receive and log all change requests from project stakeholders
- Conduct preliminary risk, cost, schedule, scope analysis of change prior to CCB
- Seek clarification from change requestors on any open issues or concerns
- Make documentation revisions/edits as necessary for all approved changes
- Participate on CCB

Project Team/Stakeholders:
- Submit all change requests on standard change request forms
- Provide all applicable information and detail on change request forms
- Be prepared to address questions regarding any submitted change requests
- Provide feedback as necessary on impact of proposed changes
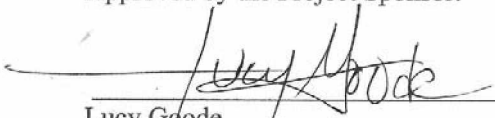
Change Control Process

The Change Control Process for the AML Project will follow the standard change process for all project activities. The project manager has overall responsibility for executing the change management process for each change request.

1) Identify the need for a change (Stakeholders) – Change requestor will submit a completed change request form to the project manager.
2) Log change in the change request log (Project Manager) – The project manager will keep a log of all submitted change requests throughout the project's lifecycle.
3) Evaluate the change (Project Manager, Team, Requestor) – The project manager will conduct a preliminary analysis on the impact of the change to risk, cost, schedule, and scope and seek clarification from team members and the change requestor.
4) Submit change request to CCB (Project Manager) – The project manager will submit the change request, as well as the preliminary analysis, to the CCB for review.
5) Obtain Decision on change request (CCB) – The CCB will discuss the proposed change and decide whether it will be approved or denied based on all submitted information.
6) Implement change (Project Manager) – If a change is approved by the CCB, the project manager will update and re-baseline project documentation as necessary.
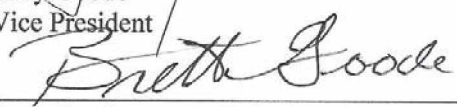
SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

_____   Date: 1-26-2015

Lucy Goode
Vice President
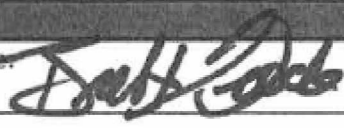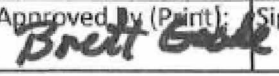
_____   Date: 1-26-2015
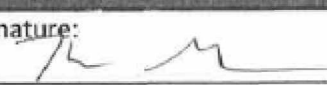
Brett Goode
Director of Facilities and Operations
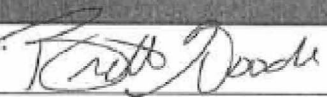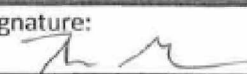
Appendix A

Change Request Form		
Project Information		
Project Title: Alaska Majestic Lodge Project		Project Number: 001
Project Manager: Kelvin Goode		

Section 1: Change Request		
Requester Name: Kelvin Goode	Date of Request:	Change Request Number: 01
Requester Phone: 907-952-1805	2014.10.10	
Item to be Changed: Scope, Cost		Priority(1-5): 4

Description of Change: The change involves adding an additional Juniper Duplex and at the same time, combining all the duplexes such that the four duplexes share a deck and crawlspace under a conjoined and contiguous roof.

Estimated Cost & Time: 2 hours and $0

Section 2: Change Evaluation	
Evaluated by: Brett Goode	Work Required: Adds work in coordination effort during phase II design and phase III construction.
What is Affect: Overall Savings of material. We received an additional duplex for free in the log savings by combining. Also de-complicates the fire protection strategy	

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost is not likely to increase. Hours will added to stakeholder engagement. No impact to overall schedule. Change ensures better quality and saves foot print in tundra. No added risks, added opportunity for socializing amonst guests and greater chance for safe wildlife viewing.

Section 3: Change Resolution			
Accepted ✗ Rejected	Approved By (Print): *Brett Goode*	Signature: *Brett Goode*	Date: 10/14/19
Comments:			

Section 4: Change Tracking			
Completion Date 10/15/14	Completed by (Print): KELVIN GOODE	Signature: 7L	Date: 10/15/14

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

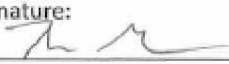## Change Request Form

Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request:	Change Request Number: 02
Requester Phone: 907-952-1805	2014.10.29	
Item to be Changed: Scope, Deletion of Owners Cabin and Elders Cabin		Priority(1-5): 4

Description of Change: The change involves deleting the owners cabin and the elders cabin.

Estimated Cost & Time: 1 hours and $0 (unrealized costs of thousands of dollars)

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required: None.
What is Affect: Overall Savings of material. There is also an overall savings in time, and the cost of that material saved. Also decreases footprint of site	

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost is is likely to decrease. Hours will added to stakeholder engagement. No impact to overall schedule, possibly one to two weeks of time saved. Change ensures better quality and saves foot print in tundra. No added risks.

Section 3: Change Resolution

Accepted	X	Approved by (Print):	Signature:	Date: 1/12:14
Rejected		Brett Goode	*Brett Goode*	

Comments:

Section 4: Change Tracking

Completion Date	Completed by (Print):	Signature:	Date:
11-4-14	KELVIN GOODE		11-4-14

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.
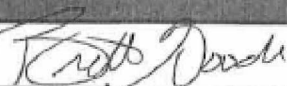
Change Request Form			
Project Information			
Project Title: Alaska Majestic Lodge Project		Project Number: 001	
Project Manager: Kelvin Goode			
Section 1: Change Request			
Requester Name: Kelvin Goode	Date of Request: 2014.10.29	Change Request Number: 03	
Requester Phone: 907-952-1805			
Item to be Changed: Metrics Selection and use.		Priority(1-5): 5	

Description of Change: The change involves re-evaluating the effectivness of the selected metrics. Stakeholder Engagement, Cost, Communications and Risk are not sufficient metrics to track and manage in the planning stage. Qualitative metrics are more ideal in planning process with a mixture of both qualitative and quantitiative metrics during the execution through closing process of the project life cycle. New metrics for planning are : risk, Scope, Stakeholder engagement and Quality.

Estimated Cost & Time: 8 hours and $0

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required: 8 Hours re-designing metrics management plan.
What is Affect: Changes how the streamlines work flow .	

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost is may be impacted in unrealized cost savings. At least 8 Hours will added in addressing the metrics change during the planning stage, but the hours saved during design and construction may be more. No impact to overall schedule, possibly one to two weeks of time saved. Change shows evaluation step "Check" in "Plan, Do, Check Act" is being used. No added risks.

Section 3: Change Resolution

Accepted ✗ Rejected	Approved by (Print): *Brett Goode*	Signature: *Brett Goode*	Date: *4/1/19*
Comments:			

Section 4: Change Tracking

Completion Date 11-5-14	Completed by (Print): KELVIN GOODE	Signature:	Date: 11-5-14

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Change Request Form			
Project Information			
Project Title: Alaska Majestic Lodge Project		Project Number: 001	
Project Manager: Kelvin Goode			
Section 1: Change Request			
Requester Name: Kelvin Goode	Date of Request:	Change Request Number: 04	
Requester Phone: 907-952-1805	2014.11.15		
Item to be Changed: Business Plan Service Options		Priority(1-5): 3	
Description of Change: Deleted 3 day, single day, boat surcharge. Only offering 6 day packages.			
Estimated Cost & Time: 3 hours and $0			

Section 2: Change Evaluation	
Evaluated by: Brett Goode	Work Required: Update change log, impliment in
What is Affect: May streamline overall operation efficency and save revenue in unrealized transportation costs.	business plan and account for cost change in financial sheets.
Impact to Cost, Schedule, Scope, Quality, and Risk: Saves up to two additional flight time days, allows for better quality of service, reduces complexity of packages offered. Reduces risk of overbooking and empty beds.	

Section 3: Change Resolution				
Accepted X	Approved by (Print): Bret Goode	Signature:		Date: 11-17-14
Rejected				
Comments: *This makes it less complacated for now.*				

Section 4: Change Tracking				
Completion Date 11-19-14	Completed by (Print): KELVIN GOODE	Signature:		Date: 11-19-14
Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.				

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Change Request Form		
Project Information		
Project Title: Alaska Majestic Lodge Project		Project Number: 001
Project Manager: Kelvin Goode		

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request: 11/15/2014	Change Request Number: 005
Requester Phone: 907-952-1805		
Item to be Changed: Cost of project		Priority(1-5): 5

Description of Change: After conducting a more in depth Rough Order of Magnetude Estimate the anticipated cost will increase.

Estimated Cost & Time: The anticipated costs go from $680,000 to $2,350,000

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required: Perform a more detailed cost estimate.
What is Affect: Overall cost increase, decrease in risk exposure	

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost increase of $1,670,000. Schedule, scope, quality did not change. Cost related risk exposure went way down.

Section 3: Change Resolution

Accepted X	Approved by (Print): Brett Goode	Signature: *Brett Goode*	Date: 11-17-14
Rejected			

Comments:

Section 4: Change Tracking

Completion Date 11-19-14	Completed by (Print): KEWNGOODE	Signature:	Date: 11-19-14

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Change Request Form

Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request:	Change Request Number: 007
Requester Phone: 907-952-1805	01/26/2015	
Item to be Changed: Scope of project		Priority(1-5): 5

Description of Change: Analysis of the deliverables set in the project indicates that the project scope must be reduced so that the business plan may maintain alignment between the business vision and sponsor values and customer/stakeholder relations.

Estimated Cost & Time: $0 and estimated time savings of 4 months.

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required: Re-development of scope and
What is Affect: Project duration shall not increase, but the quality of the business plan and lodge design will increase.	schedule. Additional research required for business planning.

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost-$0, Schedule- 4 month time savings, Scope-Reduced scope by eliminated construction management plan, Risk-decrease in cost and scope related risk exposure, Quality- Overall product quality will be more in line with anticipated service delivery

Section 3: Change Resolution

Accepted	X	Approved by (Print):	Signature:	Date:
Rejected		Brett Goode		1-27-15

Comments:

Section 4: Change Tracking

Completion Date	Completed by Kelvin	Signature:	Date:
1-30-15	(Print): KAG Goode		1-30-15

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Change Request Form		
Project Information		
Project Title: Alaska Majestic Lodge Project		Project Number: 001
Project Manager: Kelvin Goode		
Section 1: Change Request		

Requester Name: Kelvin Goode	Date of Request: 11/21/2014	Change Request Number: 005
Requester Phone: 907-952-1805		
Item to be Changed: Duration of Project		Priority(1-5): 6

Description of Change: Analysis of the deliverables set in the project and actual work completed it is apparent that more time is needed to deliver a product that meets the standards of the University and the project. Self assessment has indicated that more work is required to meet the PPM 4 deliverable milestone.

Estimated Cost & Time: $0 and and additional 4 month delay.

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required: Fulfill the Phase I sequence of the scope
What is Affect: Overall project duration increase, decrease in risk exposure	

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost-$0, Schedule- 4 month increase, Scope-No change, Risk-decrease in cost and scope related risk exposure

Section 3: Change Resolution

Accepted X	Approved by (Print): Brett Goode	Signature: *Brett Goode*	Date: 11-21-14
Rejected			

Comments:

Section 4: Change Tracking

Completion Date 11-22-14	Completed by (Print): Kelvin Goode	Signature:	Date: 11-22-14

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Change Request Form

Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001

Project Manager: Kelvin Goode

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request:	Change Request Number: 007
Requester Phone: 907-952-1805	01/26/2015	
Item to be Changed: Scope of project		Priority(1-5): 5

Description of Change: Analysis of the deliverables set in the project indicates that the project scope must be reduced so that the business plan may maintain alignment between the business vision and sponsor values and customer/stakeholder relations.

Estimated Cost & Time: $0 and estimated time savings of 4 months.

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required: Re-development of scope and schedule. Additional research required for business planning.
What is Affect: Project duration shall not increase, but the quality of the business plan and lodge design will increase.	

Impact to Cost, Schedule, Scope, Quality, and Risk: Cost-$0, Schedule- 4 month time savings, Scope-Reduced scope by eliminated construction management plan, Risk-decrease in cost and scope related risk exposure, Quality- Overall product quality will be more in line with anticipated service delivery

Section 3: Change Resolution

Accepted X	Approved by (Print): Brett Goode	Signature:	Date: 1-27-15
Rejected			

Comments:

Section 4: Change Tracking

Completion Date 1-30-15	Completed by (Print): KELVIN GOODE	Signature:	Date: 1-30-15

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Change Request Form
Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request:	Change Request Number:
Requester Phone:	02/09/2015	008
Item to be Changed: Authority of Project Manager		Priority(1-5): 5

Description of Change:
Project manager Authority is increased to propose and approve scope changes
that do not impact costs.

Estimated Cost & Time:
Will Save time for the sponsors in revewing proposed changes. The project manager is still
required to debrief the sponsors on the impacts of the project changes.

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required:
What is Affect: Increase in effeciency and savings of the sponsors time.	Propose and approve Change order 008 through the change process.

Impact to Cost, Schedule, Scope, Quality, and Risk:
None

Section 3: Change Resolution

Accepted X	Approved by (Print):	Signature:	Date:
Rejected	Brett Goode		02/09/15

Comments:
The project manager is required to brief the sponsors on any changes made since the
last status update.

Section 4: Change Tracking

Completion Date 02/09/2015	Completed by (Print): Kelvin Goode	Signature:	Date: 02/09/15

Signed Document indicates that the project documentation has been updated to reflect the
approved changes made to the project.

Change Request Form
Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request:	Change Request Number:
Requester Phone:	03/03/2015	009
Item to be Changed: Bi-Weekly Meeting		Priority(1-5): 5

Description of Change:
The scheduled bi-weekly impromptu discussions with the sponsors is to be changed to an as needed basis.

Estimated Cost & Time:
Will Save time for the sponsors and eliminates the need for a scheduled interview as there are so many discussions between meetings.

Section 2: Change Evaluation

Evaluated by: Brett Goode	Work Required:
What is Affect: Increase in effeciency and savings of the sponsors time.	Propose and approve Change order 009 through the change process.

Impact to Cost, Schedule, Scope, Quality, and Risk:
None

Section 3: Change Resolution

Accepted X	Approved by (Print)	Signature:		Date:
Rejected	: Kelvin Goode			03/03/15

Comments:
The project manager is required to brief the sponsors on any changes made since the last status update.

Section 4: Change Tracking

Completion Date 03/03/2015	Completed by (Print): Kelvin Goode	Signature:		Date: 03/03/15

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Change Request Form				
Project Information				
Project Title: Alaska Majestic Lodge Project			Project Number: 001	
Project Manager: Kelvin Goode				
Section 1: Change Request				
Requester Name: Kelvin Goode Requester Phone:		Date of Request: 03/12/2015	Change Request Number: 010	
Item to be Changed: Performance metric			Priority(1-5): 5	
Description of Change: The risk metric shall be transferred to the scope of PM 686B and deleted from PM 686A as risk was not being used during the planning process.				
Estimated Cost & Time: Will allow for a more controlled setting during the execution process of the project.				
Section 2: Change Evaluation				
Evaluated by: Kelvin Goode What is Affect: reporting risk will be postponed until execution		Work Required: Propose and approve Change order 010 through the change process.		
Impact to Cost, Schedule, Scope, Quality, and Risk: May see reduced clarity on the traceability between risk, time, scope and quality.				
Section 3: Change Resolution				
Accepted X Rejected	Approved by (Print) : Kelvin Goode	Signature:		Date: 03/12/15
Comments: The project manager is required to brief the sponsors on any changes made since the last status update.				
Section 4: Change Tracking				
Completion Date 03/12/2015	Completed by (Print): Kelvin Goode	Signature:		Date: 03/12/15
Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.				

Change Request Form	
Project Information	
Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Change Request		
Requester Name: Kelvin Goode	Date of Request:	Change Request Number:
Requester Phone:	10/14/2015	011
Item to be Changed: Product Deliverables		Priority(1-5): 4

Description of Change:
The competitive analysis tool creation is not required. the competition for the industry is listed as marginal and the creation of the tool would not aid this project's scope.

Estimated Cost & Time:
Will save an estimated 4 hours of work in not creating the tool.

Section 2: Change Evaluation	
Evaluated by: Kelvin Goode	Work Required:
What is Affect: N/A	Propose and approve Change order 011 through the change process.

Impact to Cost, Schedule, Scope, Quality, and Risk:

Positively impacts schedule, scope and quality.

Section 3: Change Resolution				
Accepted X	Approved by (Print)	Signature:		Date:
Rejected	: Kelvin Goode			10/14/15

Comments:
The project manager is required to brief the sponsors on any changes made since the last status update.

Section 4: Change Tracking				
Completion Date 10/14/2015	Completed by (Print): Kelvin Goode	Signature:		Date: 10/14/15

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Project Management Department, University of Alaska Anchorage

Change Request Form
Project Information

Project Title: Alaska Majestic Lodge Project	Project Number: 001
Project Manager: Kelvin Goode	

Section 1: Change Request

Requester Name: Kelvin Goode	Date of Request:	Change Request Number:
Requester Phone:	10/14/2015	011
Item to be Changed: Product Deliverables		Priority(1-5): 4

Description of Change:
The competitive analysis tool creation is not required. the competition for the industry is listed as marginal and the creation of the tool would not aid this project's scope.

Estimated Cost & Time:
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Section 2: Change Evaluation

Evaluated by: Kelvin Goode	Work Required:
What is Affect: N/A	Propose and approve Change order 011 through the change process.

Impact to Cost, Schedule, Scope, Quality, and Risk:

Positively impacts schedule, scope and quality.

Section 3: Change Resolution

Accepted X	Approved by (Print)	Signature:	Date:
Rejected	: Kelvin Goode		10/14/15

Comments:
The project manager is required to brief the sponsors on any changes made since the last status update.

Section 4: Change Tracking

Completion Date 10/14/2015	Completed by (Print): Kelvin Goode	Signature:	Date: 10/14/15

Signed Document indicates that the project documentation has been updated to reflect the approved changes made to the project.

Appendix A

Alaska Majestic Lodge Project Abstract

The Alaska Majestic Lodge (AML) Project is proposed to deliver a wilderness lodge business plan. The business opportunity will allow for the owners to deliver an authentic Alaskan experience that prospective clientele will find memorable, unique and enjoyable. When in operation, the business may provide services for up to two hundred people seasonally.

The lodge will be located on the Alaskan Peninsula is expected to be the only 100% Alaskan Native owned lodge in Southwest Alaska. Preliminary market analysis shows that in the summer of 2011, over 48,000 people visited the southwest region. Not including travel costs, nearly $84.8 million was contributed to the region's economy. AML's potential market share amounts to $1.8 million per year.

Further analysis of Alaska's tourist volumes and market data will help in determining a road map for the business design. Some publications to be consulted in delivering the business plan are:

- Alaska Visitor Statistics Program
- Alaska Small Business Development Program
- University of Alaska Center for Economic Development

This business opportunity will help stimulate the region's economy. No costs are anticipated in delivering the business plan. The delivery date deadline for the 100% completed business plan is November 27, 2015.

APPENDIX B
PROJECT CHARTER

Alaska Majestic Lodge

VERSION: 08

REVISION DATE: 12/05/2015

Approval of the Project Charter indicates an understanding of the purpose and content described in this document. By signing this document, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Kelvin Goode	51% Owners, President & Project Manager	*[signature]*	12-5-15
Lucy Goode	49% Owner, Vice President	*[signature]*	12-5-15
Brett Goode	Director of Facilities and Operations	*[signature]*	12-5-15

Contents

Project Scope Statement

Opportunity Statement

An opportunity exists that allow for the business owners and project sponsors to deliver an Alaskan experience that prospective clientele will find memorable, exciting and unique. If the operation is conducted as planned, the owners may provide up to two hundred people unforgettable experiences that can be treasured and shared.

This lodge is located on Becharof Lake on the Alaskan Peninsula. The lodge establishment will be the only 100% Alaskan Native owned lodge in Southwest Alaska and the only establishment of its kind in the region. In the summer of 2011, over 48,000 people visited the southwest region. Not including travel, those tourists contributed nearly $84.8 million to the region's economy. AML's potential market share would amount to $1.8 million per year.

This project scope statement will define the boundaries of the AML Project. The project concerns the planning, development and delivery of the AML business plan. The project planning is expected to be completed by April 27, 2015. The business plan delivery date is expected to be November 20, 2015. It is estimated that no expenses shall be incurred during this project, however operational financial planning shall be incorporated into the project.

Product Description

AML will offer sport fishing, wildlife viewing, hiking, and educational teachings about the area, environment, and people. There will be six double occupancy rooms for visitors, two four-bed cabins for staff and a main lodge with the kitchen, lounge and office. The lodge manager will also act as winter man for the facility in the off-season. All labor will be seasonal.

Business Mission:

AML's mission is to promote goodwill, understanding and respect among the various cultural communities of the world.

Business Vision:

AML's vision is to preserve, protect and inspire humanities understanding of and respect for nature so as it remains intertwined in the fabric of modern society.

Business Goals include:

4. Provide product that promotes the Natural World and the betterment of human character.
5. Provide a product that exhibits first class resort sport fishing, wildlife viewing, and other recreational activities that utilize the regions resources and conform to Alaska Visitor Statistics Program most enjoyed activities experienced by tourists.
6. Provide product that educates clientele protecting and preserving of the natural environment.

Project Description

The AML Project is proposed to research sport fishing markets in Southwest Alaska. The output of the research will be a business plan with analysis which will deliver recommendations on how to approach establishing and operating a successful sport fishing lodge in Southwest Alaska. The business plan shall conform to the requirements and expectations set forth by project oversight approval authorities. Refer to the Project Charter for additional information regarding project oversight approval authorities.

Project Objective

The objective of the project is to deliver a final business plan of the proposed Alaska Majestic Lodge business. The business plan should provide the steps necessary to successfully saturate the market for sport fishing and tour

guiding in the Becharof National Wildlife Refuge. Through this endeavor, the Project Manager shall demonstrate his knowledge and mastery of project management principles via demonstration of understanding the project management knowledge areas of Scope Management, Time Management, Risk Management and Quality Management.

Project Justification

The Alaska Visitor Statistics program has shown that since 2012 a 7% increase in tourist volume has been realized in Southwest Alaska. The increase in added volume contributed an additional $4 million to total the visitor industry spending impact, which came to $120 million. Considering most villages in southwest Alaska do not possess the infrastructure to support tourism, the majority of the economic impact was seen in the lodging industry.

The area of interest for the proposed project is in the Becharof National Wildlife Refuge. There are no wilderness resorts in the refuge, ensuring a competitive edge in the market. The sponsors have conducted preliminary evaluation and found that lending institutions for a project of this stature are willing to provide funding after the property is procured. Comparing competition in the region, the benefits far outweigh the costs of operation.

Project Strategy

The project manager's strategy will include: researching other operations similar, researching economic viability, incorporating sponsor and personal experience, and iterative consultations with subject matter experts. This strategy shall enable the project manager to identify critical success factors, approval authority expectations and deliverable acceptance criteria.

Project Deliverables

The project scope shall deliver a 100% completed business plan no later than November 27, 2015. The AML project management plan shall consult of and incorporate Project Management Institute (PMI) methodologies throughout the project lifecycle. The AML project management plan shall address the following life cycle topic areas, management plans and documents:

Project Initiation

Project Charter
Stakeholder Assessment & Analysis
Project Success & Acceptance Criteria
Scope Statement & Initial Project Requirements

Project Planning

Project Document Integration
Scope Development & Change Management Planning
WBS Development
Schedule Planning
Quality Planning
Risk Identification, Analysis and Response Planning

Project Execution

Stakeholder Engagement
Metrics Utility and Accuracy Reporting

Business Plan must be ready to distribute. The information in the business plan shall address the following:
    10. Executive Summary
    11. Industry Analysis

        a. Industry overview
        b. Competitors
        c. Current Target market
12. Company
        a. Concept
        b. Product/Service
        c. Our Target Market
        d. Why we are unique
        e. Company Structure
13. Market & Sales
        a. Target market
        b. How will we attract our customers
        c. Marketing Channels
        d. Website and social media
14. Operations
        a. Service
        b. Company Capabilities
        c. Competitive Advantage
15. Management & Ownership
        a. Management Team
        b. Gaps in team
        c. Board of Advisors
16. Critical Risks
        a. Potential risks and risk responses
17. Financials
        a. Capital
        b. Overview of Financials
        c. Strategic Plan
18. Appendix
        a. Marketing Channels
        b. Financials
        c. Milestones
        d. Loan Entities-Anchorage Area

Project Monitoring & Controlling

KPI and PMP validation
Status, Forecast and Progress reporting
Change Management Verification and Assessment

Project Closure

Transition to Operations Planning
Project Records, Documentation Control and Administrative Closeout Implementation
Project Narrative and Final Project Report
Project Management Maturity Assessment and Application
Organizational Process Assets and Enterprise Environmental Factors Analysis
Project Debriefing
Lessons Learned & Root Cause Analysis
Research Methods, Surveys and Data Analysis
100% Project Delivery and Sponsor Acceptance Document

Project Limits & Exclusions

All else not mentioned in the scope statement is excluded from the project. The Project Manager is granted unilateral control over project activities and is approved to request, issue and approve project changes.

Critical Success Factors

- Meet the deliverables in the allotted time as shown in the schedule.
- Report progress at milestones using selected performance metrics.
- Pass PM 686A with marks no less than a "B" grade as indicated in the Syllabus.
- Lessons learned incorporated in plan development
- Project manager performs effective stakeholder management
- Institutional Review Board (IRB) Approves Project

1.6 Assumptions

- Proposed project is approved by Institutional Review Board (IRB).
- Business- future southwest state tourism revenues for sport fishing and tourism do not decline.
- Technology- Use of alternative technology will accommodate the mission of the lodge and contribute to long term cost savings.
- Resources- Project team working on the project are certified with credentials appropriate for planned work.
- Schedules- Time allotted for business plan development in PM 686B is enough time to deliver product.

1.7 Constraints

- Time-the business planning timeframe:
    - Project Management Plan must be completed by April 10, 2015.
    - Business Plan completion must be completed by November 27, 2015.
- Budget-No capital is currently allotted for planning and executing project.
- Location-the location is remote. The site is only accessible by float plan or small skiff in the summer season. This will add difficulty in designing the business plane as operation logistics are complex.
- Requirements in PM 686A and 686B Syllabus must be completed within the allotted time frame.
- Human Resources-Limited number of resources to accomplish planning of the business plan.

Acceptance Criteria

- Deliverables are posted on time.
- Deliverables posted are complete.
- Research package posted to IRB is complete.
- Deliverables posted meet quality requirements.
- Business Plan submissions are sponsor approved.

Major Project Milestones

PM 686A Milestone/Deliverable	Target Date
686A PPM #01 Required Deliverables Submitted	01/30/2015
686A PPM #02 Required Deliverables Submitted	02/20/2015
686A PPM #03 Required Deliverables Submitted	03/13/2015
686A PPM #04 Required Deliverables Submitted	04/10/2015
686A Research Proposal posted to IRB	04/10/2015
686A Oral Defense Presented	04/20/2015
686A Final Planning Required Deliverables & PMP Submitted	04/28/2015
PM 686B Milestone/Deliverable	**Target Date**
686B PPM #01 Required Deliverables Submitted	09/18/2015
686B PPM #02 Required Deliverables Submitted	10/10/2015
65% Business Plan Submitted	10/30/2015
686B PPM #03 Required Deliverables Submitted	11/07/2015
95% Business Plan Submitted	11/20/2015
686B PPM #04 Required Deliverables Submitted	11/27/2015
100% Business Plan Submitted	11/27/2015
686B Final Oral Defense Presented	12/02/2015
686B Project Final Required Deliverables Submitted	12/08/2015

Exhibit I: Project Milestones

1.8 Project Risks

Internal Risks

Positive

Opportunity: Sponsor Board members possess equally vested interests in the success of the business
Response: Quick to mobilize and act in sequence with each other

Opportunity: Business will be the only 100% native owned lodge in southwest Alaska
Response: Include in marketing plan and use to attain funding opportunities through minority owned business loans

Negative

Risk: Schedule compression
Response: Mitigate, identify all non-critical tasks and complete when able

Risk: Project design does not conform to product requirements
Response: Hold several stakeholder meetings for requirements gathering

External Risks

Positive

Opportunity: Business Plan completed earlier than deadline
Response: Re-assess work performance and hold stakeholder briefings to gather input regarding substandard work

Negative

Risk: Alaskan Southwest Tourism market trends decline
Response: Accept, market business at trade show conventions and gather clients directly

Funding Authority

No costs are anticipated in delivering the business plan.

Project Oversight Authority

Business Oversight Authorities:

Becharof National Wildlife Refuge (BNWR)
Alaska Department of Fish & Game (ADFG)
Alaska Department of Fish & Wildlife (ADFW)
Alaska Department of Environmental Conservation (DEC)
Department of Natural Resources (DNR)
Division of Environmental Health/Food Safety and Sanitation Program
Chapter 31 of the Alaska Administrative Code (AAC)
Alaska Department of Public Safety, Division of Fire and Life Safety (ADPS)
Lake and Peninsula Borough (LPB)
Internal Revenue Service (IRS)

Project Oversight Authorities:

Lucy Goode, Sponsor
Brett Goode, Sponsor
Kelvin Goode, Project Manager
LuAnn Piccard, PM Advisor
Roger Hull, PM Advisor
Jim Bates, PM Advisor
Sharilyn Mumaw, IRB Approval Authority

Relevant Policies:

The control of the project resides with the two sponsors. The project manager maintains unilateral authority to submit and approve changes that do not impose on the product requirements. The project manager is to provide progress report briefings and stakeholder meeting sessions to the sponsors to maintain project and product alignment.

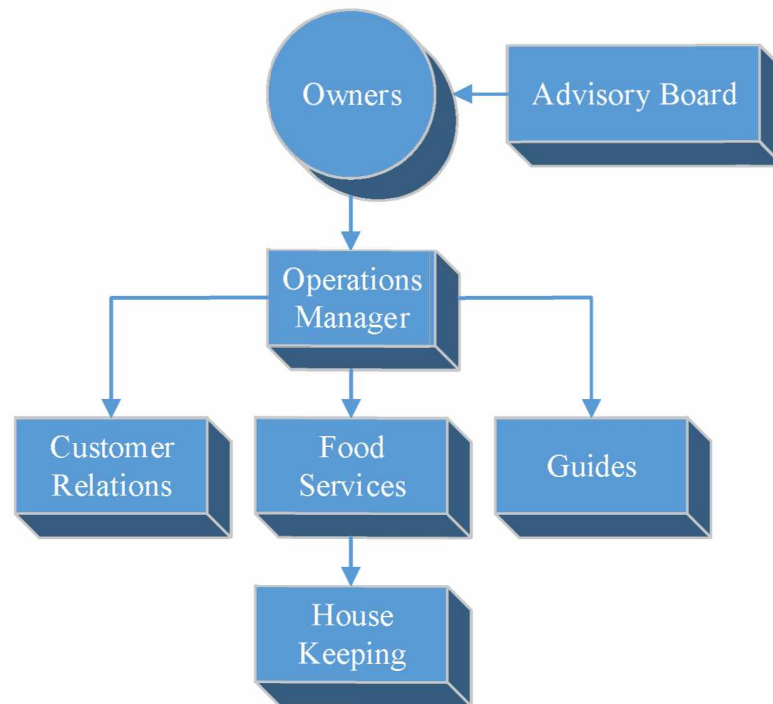**Business and Project Organization Charts**

```
                    Owners  ◀────  Advisory Board
                      │
                      ▼
                 Operations
                  Manager
        ┌─────────────┼─────────────┐
        ▼             ▼             ▼
    Customer        Food          Guides
    Relations      Services
                      │
                      ▼
                    House
                   Keeping
```

Exhibit II: Business Organizational Chart

```
                      Sponsors
                         │
                         ▼
  Region Elder  ────▶  Project  ◀────  MSPM Advisory
   Advisor             Manager           Committee
                  ┌──────┴──────┐
                  ▼             ▼
              Designer       Marketing
                             Consultant
```

Exhibit III: Project Organizational Chart
Roles and Responsibilities

Role	Responsibility
Kelvin Goode, Project Manager	Acts as liaison between the sponsors and project team, all project issues are reported to PM
Lucy Goode, Sponsor	Provides oversight and ensures alignment between project scope and business mission.
Brett Goode, Sponsor/Director of Operations	Provides support in oversight and planning. Will play crucial role in design of project
MSPM Advisors	Provide insights and advising to PM and act as final approval authorities for MSPM project related deliverables
Sharilyn Mumaw	Institutional Review Board (IRB) Approval Authority. Responsible for determining whether student research is acceptable according to IRB requirements

Exhibit IV: Project Roles Register

Responsibility Matrix

Alaska Majestic Lodge Resource Assignment Matrix (RAM)

Major Milestone	Kelvin Goode	Lucy Goode (Sponsor)	Brett Goode (Sponsor)	Roger Hull (Primary Advisor)	LuAnn Piccard (Advisor)	Jim Bates (Advisor)	Sharilyn Mumaw (IRB)
PM 686A Milestone/Deliverable							
686A PPM # 01 Required Deliverables Submitted	E	A	A	A	A	I	
686A PPM # 02 Required Deliverables Submitted	E	I	I	A	A	I	
686A PPM # 03 Required Deliverables Submitted	E	I	I	A	A	I	C
686A PPM # 04 Required Deliverables Submitted	E	I	I	A	A	I	C
686A Research Proposal Submitted to IRB	E	I	I	A	A	I	A
686A Final Oral Defense Presented	E	I	I	A	A	I	
686A Final Required Project Deliverables Submitted	E	A	A	A	A	A	A
PM 686B Milestone/Deliverable							
686B PPM #01 Required Deliverables Submitted	E	I	I	A	A	C	
686B PPM #02 Required Deliverables Submitted	E	I	I	A	A	C	
65% Business Plan Submitted	E	C	C	C	C	C	
686B PPM #03 Required Deliverables Submitted	E	I	I	A	A	C	
95% Business Plan Submitted	E	C	C	C	C	C	
686B PPM #04 Required Deliverables Submitted	E	I	I	A	A	C	
100% Business Plan Submitted	E	A	A	C	C	C	
686B Final Oral Defense Presented	E	I	I	A	A	A	
686B Final Required Project Deliverables and Business Plan Submitted	E	A	A	A	A	A	

Legend

E = responsible for execution (may be shared)

A = final approval for authority

C = must be consulted

I = must be informed

Exhibit V: Resource Assignment Matrix for Summary Milestones

Points of Contact

Role	Name/Title/Organization	Phone	Email
Kelvin Goode	Project Manager	907-952-1805	kgchugiaker@hotmail.com
Lucy Goode	Project Sponsor	907-764-0063	lasg20@yahoo.com
Brett Goode	Project Sponsor	907-246-3778	lakebecharof@gmail.com

Exhibit VI: Contact List Table

Revision History

Version	Date	Name	Description
01	09/03/2014	Kelvin Goode	Document Created
02	10/10/2014	Kelvin Goode	Document Updated
03	10/29/2014	Kelvin Goode	Document Updated
04	01/25/2015	Kelvin Goode	Document Updated
05	02/20/2015	Kelvin Goode	Document Updated
06	03/15/2015	Kelvin Goode	Document Updated
08	04/07/2015	Kelvin Goode	Document Updated
09	12/05/2015	Kelvin Goode	Document Updated

Exhibit VII: Revision History Table

Appendix C

True Natives of Alaska Corporation
P.O. Box 296
King Salmon, AK 99613
Email Address: info@truenativesofalaska.com

9/9/14

Attn: Ms. LuAnn Piccard
Project Management Department (MSPM)
University of Alaska, Anchorage
University Center, Room 155
3901 Old Seward Highway
Anchorage, Ak 99503

Re: Letter of Support for Kelvin Goode's Majestic Lodge Project

Dear Madam,

It is with pleasure that I write this letter to express our support for our son Kelvin Goode's Majestic Lodge Project.
This project has been in the planning for many years in the family. We are very happy to have Kelvin take an important lead role in accomplishing that goal for the family business.
We are happy that his training and certification in project management at the University of Alaska has provided him the insight and knowledge to successfully manage a project of this caliber.
We have witnessed the education he has attained while attending the MSPM has provided him with the tools needed to accomplish this project.
He has a creative, intelligent mind with a positive attitude and a drive that are critical for success. We are confident the tools he has learned from the MSPM training will be used to successfully put this project together and run this business afterwards.

If you have any questions, please feel free to contact me at 907-764-0063 my cell or work number at Paug-Vik Inc. Ltd. 907-246-4278 ext. 4 General Manager, Lucy Goode.

Best Regards,

Lucy Goode
President of True Native of Alaska Corporation (TNAC)

Research Methodologies
Alaska Majestic Lodge Project

Project Background

The project idea is set in rural Alaska. The level of difficulty with respect to logistics of design and construction, relationship development, and marketing will be high. Successfully developing a wilderness fishing resort come with high risk. The opportunity identified by the sponsors is high risk, should the appropriate level of planning not take place. However, should the project be a success, the rewards will be well worth the effort.

Project Purpose

The purpose of the project is to design a business plan and corresponding project management plan for the planning of a wilderness fishing resort start-up business in rural Alaska. The business drivers in the planning effort allow for several things thing happen: the owners' will be able to give back to the region, capitalization of a niche in the market they've mapped and identified will become a reality, potential for research and future partnerships to help conduct that research, opportunities for education will increase, etc.. For purposes such as those listed above the lodge concept is profitable, both economically and sociologically.

Project Literature

A substantial amount of literature regarding business development is available in all categories of information searches. The statistics will be called from state programs that catalog Alaskan tourism statistics annually. The state has developed resources that outline, step by step, the essentials in developing rural based tourism businesses.

Project Question & Hypotheses

Can the requirements to initiate and operate a remote fishing lodge in southwest Alaska be planned, measured and approved using a project management methodologies?

A project is defined as a temporary endeavor that produces a unique product, service or result. The design, construction, and operations planning for the proposed business fits the definition of a project and can thus utilize concepts derived from learnings as taught by the Project Management Institute.

Project Research and Design

Many individuals whom wish to start a business encounter the monumental task of researching the requirements to start and operate a business. The purpose of this research is to gather information required to successfully create a business plan and corresponding project management plan that are tailored to the project location and anticipated services provided. Research in this project includes:
Internet Search:
- Industry research, search of statistics for the proposed business's industry
- Requirements Identification and Analysis for business planning and project management planning
- Research of similar businesses, operation & services offered
- Research of funding agencies for low income minority owned businesses and programs similar
- Project management tools and templates (project charter, procurement plan, other tools etc.)
- Business plan outlines
- Risks and responses

Verbal Survey Interview with subject matter expert, researcher to attain input on:
- Logistics assessment
- Costs assessment
- Risk & Risk Response assessment

- Schedule assessment/Work Break Down Structure
- Scope assessment
- Regulatory assessment
- Operations assessment

Verbal Survey Interview with Vendors, researcher to attain input on:
- Product/Service information
- Shipping information
- Cost information
- Value engineering, are there better systems that can be substituted

Expected Results

The anticipated results are that the business shall be unique to its industry, location, services offered, and ambience. Utilization of research findings shall help to develop a business plan appropriate to the mission and vision as defined by the owners'. The business plan and corresponding project management are expected to look something like the outline below:

Business Plan

- Executive Summary
- Industry Analysis
- Company Concept
- Market and Sales
- Operations
- Management & Ownership
- Critical Business Risks
- High Level Financials
- Appendix

Project Management Plan

- Initiating & Planning Project Lifecycle
    - Project Initiation and Integration
    - Scope Development and Change Management Planning
    - Critical Success Factors (CSFs) and Key Performance Indicators (KPIs)
    - Work Break Down Structure Development
    - Schedule Planning, Estimation and Optimization
    - Budget Planning and Cost Estimation
    - Quality Planning
    - Risk Identification, Analysis and Response Planning
    - Stakeholder Assessment and Planning
- Executing, Monitoring & Controlling Project Lifecycle
    - Project Measurement, Metrics and Earned Value Management
    - Status, Forecast and Progress reporting
    - KPI, DIPP, and PMP validation
    - Stakeholder management
    - Metrics Utility and Accuracy
    - Change management Plan and Procurement Management Plan
- Operation Integration and Project Closure
    - Project Closure Plan
    - Cost-Benefit Analysis
    - Contract Closeout and Termination
    - Claims and Disputes
    - Project Closeout and Courses of Action
    - Transition to Operations

- o Project Records, Documentation Control and Administrative Closeout
- o Creating the project narrative and Final Project Report
- o Project Troubleshooting and Recovery
- o Project Management Maturity Assessment and Application
- o Contributions to Organizational Process Assets and Enterprise Environmental Factors
- o Project Debriefing
- o Inputs and Outputs to Project Closure and Procurement Closure
- o Research Methods, Surveys and Data Analysis
- o Ethics and Professional Responsibility

Discussion and Conclusions

In conclusion, research into the viability of the planning and design of a wilderness fishing resort is expected to conclude that a vast potential of positive impact may occur should the appropriate level of planning ensue for this project.

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Terry L. Johnson, A. S. (2008). *Steps to Success for Rural Entrepreneurs: Starting an Ecotoursim Business in Alaska.* Anchorage: U.S. Department of Commerce Economic Development Adminstration.

INFORMED CONSENT DOCUMENT
EXPERT OPINION AND PRODUCT OR SERVICE INFORMATION REQUEST

Researcher(s):
Kelvin A. Goode – Principal Investigator (Project Manager)
(907) 952-1805

WHAT IS THE REASON FOR THIS SURVEY?

This survey is purposed to attain information regarding a prospective product/service for sale or expert advice regarding the sequence of project activities and their corresponding timelines. The goal of the survey is to attain enough quality information regarding the project such that the implementation of the project unfolds with minimized risk. Findings will be used for the planning and development of the business and will be kept confidential under lock and key or a personal external hard drive.

WHAT WILL I BE ASKED TO DO?

Individuals that choose to participate will complete a telephonic interview with the Researcher, Kelvin Goode. The interview will focus on a particular product or service that is being offered and information associated with its functionality. The participant may be asked to send product information or cost and shipping information. Subject Matter Experts will be asked to advise on work tasks, identify potential risks and offer any suggestions for alternative routes of action.

IS THERE ANY COMPENSATION?

No, however the choice to participate may win future business with the researcher's project.

WHO CAN PARTICIPATE?

You are invited if you are a sales or procurement representative for the company of your employ or if you are a subject matter expert with intimate understanding of the business idea and project site location.

WHAT ARE THE POTENTIAL BENEFITS AND RISKS?

There are no personal benefits, however there is potential for benefits to the organization of your employ. There are no risks.

WHAT ABOUT CONFIDENTIALITY?

The answers will be kept completely private stored on a personal external hard drive (if electronic) and under lock and key in my home (if hard copy). No personal identifiable information will be used when recorded. Random identifiers will be assigned and kept on a sheet of paper, which is set for destruction three years after the interview.

WHAT IF YOU DON'T WANT TO PARTICIPATE IN THE SURVEY?

Participation is completely voluntary. Should you start, you may stop at any time without reason and may elect to pass and move to the next question without providing an answer.

WHAT IF I HAVE QUESTIONS?

If there are questions or concerns regarding participant rights, please contact Sharilyn Mumaw, (UAA Research Compliance Officer) at (907) 786-1099. If there are questions regarding the research, please contact Kelvin Goode, (Principle Investigator) at (907) 952-1805 or Roger Hull, (Faculty Advisor) at (907) 786-1923.

I have read and understand the above and agree to participate in this study:

☒ YES
○ NO

Name: (Print) _Brett Goode Sr._ Date: _11-21-2014_

Name: (Sign-electronic works as well) _Brett Goode Sr._ Date: _11-21-2014_

All Questions will be asked verbally. The participant may choose to sign the consent form or not participate.

Mechanical Vendors
What are the optimal operating temperature(s) for the requested equipment?
What is the thermal footprint of the material used to build the facilities?
What system(s) is ideal for our project and how much would they cost?

Electrical Vendors
Are these systems compatible with 480 V 3 Phase?
What types of bad weather are the solar roofing tiles able to withstand?
What is the energy production per square foot on the solar tiles?

Shipping Vendors
How much does it cost per pound to ship?
Is there Freight On Board to Jobsite?
Are there advantages to using this type of shipping method?
Are there dangers to using this type of shipping method?
What is the lead time associated with shipping the said item?

Business Competition
What services does the lodge offer?
Where is the lodge located?
How much do those service packages cost?
What sorts of risks are associated with services offered?
How many facilities does the said company have? Dining, Housing, Other?
Are there extra costs at the lodge site when I get there?
Will I experience a high volume of foot traffic in the lodge while I'm there?
Is there a benefit to locals from the services offered?
What benefit will I expect to receive from the stay at this lodge versus another?

Subject Matter Expert
Do you feel the shipping methods are feasible for that geographical region?
What provisions might we need for that specific location?
What sorts of wildlife protection would be advisable for that specific location?
Are these logistics plans feasible? If not, might there be suggestions for alternative approaches?

INTERVIEW PROTOCOL FORM
   EXPERT OPINION AND PRODUCT OR SERVICE INFORMATION REQUEST

INTERVIEW DATE:
ORGANIZATION:
PARTICIPANT AND ROLE:

OTHER DISCUSSION:

REFERENCES DISCUSSED:

ADDITIONAL COMMENTS:

UAA Project Management Department
UNIVERSITY of ALASKA ANCHORAGE

INTERVIEW INTRODUCTION

You have been selected as either a subject matter expert or preferred vendor to help provide input for a Thesis Capstone Project that I am working on to graduate from the University of Alaska Anchorage. The project is the business design and construction planning effort. Please review, sign and send the consent form to me electronically so that we can get started with the information request.

Firstly, thank you for choosing to take part in this project. This interview is expected to take no less than 15 minutes, however this depends on the product/service in discussion. The following paragraph is a summary of the project to which the research is concerned.

> An opportunity has risen to design and construct a wilderness fishing lodge that caters first class service to customers willing to tour remote regions of the Alaskan Peninsula. The proposed lodge site is nestled off the grid in a region known as the Becharof National Wildlife Refuge. The lodge, located on the shores among the thickest salmon runs in the world, will be prime real estate for a fishing operation.

The purpose of the research is to gather data concerning the requirements for business planning, construction planning, execution and operation.

All Survey Questions will be conducted verbally.
The participant may choose to sign the consent form or not participate.
All questions asked with responses provided will be archived for three years.
The following are not all of the questions as each vendor or participant possesses and sells a unique service or product. Questions not on here will be added and archived to the individual's survey.

MECHANICAL VENDORS
What are the optimal operating temperature(s) for the requested equipment?
What is the thermal footprint of the material used to build the facilities?
What system(s) is ideal for our project and how much would they cost?

ELECTRICAL VENDORS
Are these systems compatible with 480 V 3 Phase?
What types of bad weather are the solar roofing tiles able to withstand?
What is the energy production per square foot on the solar tiles?

EQUIPMENT VENDORS
How heavy is this piece of equipment?
How much does this piece of equipment cost?
Is there Freight On Board (FOB) to the Jobsite?
Is cost of shipping included?
What are the lead times associated with receiving the piece of equipment to the jobsite?
How efficient on fuel is this piece of equipment?

SHIPPING VENDORS
How much does it cost per pound to ship?
Are there advantages to using this type of shipping method?
Are there dangers to using this type of shipping method?
What is the lead time associated with shipping the said item?

BUSINESS COMPETITION
What services does the lodge offer?
Where is the lodge located?
How much do those service packages cost?
What sorts of risks are associated with services offered?
How many facilities does the said company have? Dining, Housing, Other?
Are there extra costs at the lodge site when I get there?
Will I experience a high volume of foot traffic in the lodge while I'm there?
Is there a benefit to locals from the services offered?
What benefit will I expect to receive from the stay at this lodge versus another?

SUBJECT MATTER EXPERT
Do you feel the shipping methods are feasible for that geographical region?
What provisions might we need for that specific location?
What sorts of wildlife protection would be advisable for that specific location?
Are these logistics plans feasible? If not, might there be suggestions for alternative approaches?

COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI)
BASIC/REFRESHER COURSE IN HUMAN SUBJECTS RESEARCH CURRICULUM COMPLETION REPORT
Printed on 11/04/2014
LEARNER Kelvin Goode (ID: 4482228)
DEPARTMENT Project Management Program
PHONE 907-952-1805
EMAIL kagoode@alaska.edu
INSTITUTION University of Alaska Anchorage
EXPIRATION DATE 10/23/2017
UNIVERSITY OF ALASKA ANCHORAGE FACULTY, STAFF AND STUDENTS
COURSE/STAGE: Basic Course/1
PASSED ON: 10/24/2014
REFERENCE ID: 14400045
REQUIRED MODULES DATE COMPLETED SCORE
Introduction 10/23/14 No Quiz
History and Ethical Principles - SBE 10/24/14 5/5 (100%)
Defining Research with Human Subjects - SBE 10/24/14 5/5 (100%)
Basic Institutional Review Board (IRB) Regulations and Review Process 10/24/14 4/5 (80%)
Assessing Risk - SBE 10/24/14 4/5 (80%)
Informed Consent - SBE 10/24/14 4/5 (80%)
Privacy and Confidentiality - SBE 10/24/14 5/5 (100%)
Records-Based Research 10/24/14 2/2 (100%)
Genetic Research in Human Populations 10/24/14 2/2 (100%)
Research With Protected Populations - Vulnerable Subjects: An Overview 10/24/14 4/4 (100%)
Research with Prisoners - SBE 10/24/14 4/5 (80%)
Vulnerable Subjects - Research Involving Children 10/24/14 3/3 (100%)
Research in Public Elementary and Secondary Schools - SBE 10/24/14 4/5 (80%)
Vulnerable Subjects - Research Involving Pregnant Women, Human Fetuses, and Neonates 10/24/14 3/3 (100%)
International Research - SBE 10/24/14 4/5 (80%)
Internet-Based Research - SBE 10/24/14 4/5 (80%)
Research and HIPAA Privacy Protections 10/24/14 4/5 (80%)
Conflicts of Interest in Research Involving Human Subjects 10/24/14 5/5 (100%)
University of Alaska Anchorage 10/24/14 No Quiz
For this Completion Report to be valid, the learner listed above must be affiliated with a CITI Program participating institution or be a paid
Independent Learner. Falsified information and unauthorized use of the CITI Program course site is unethical, and may be considered
research misconduct by your institution.
Paul Braunschweiger Ph.D.
Professor, University of Miami
Director Office of Research Education
CITI Program Course Coordinator

Appendix E

One Page PM 686A Project Status Report Dashboard
Name:_Kelvin Goode_____ Date:___01/06/2015_____
Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts and knowledge to help define critical elements of the business plan delivery. Delivery of Business Plan Delivering Project Management Plan and Corresponding Project Notebook Selection of four Metric Areas to demonstrate a mastery of understanding Project Management by means of selecting appropriate Key Performance Indicators and how they will assist in monitoring project progress and forecasting. A tool to help in contributing to the PM Body of Knowledge.	*Key tasks completed and key tasks started.* **Completed:** Project Charter Preliminary Schedule Preliminary WBS Initial Stakeholder Register Initial Knowledge Area Selections **Started:** Risk Identification Requirements Identification Scope Definition Metrics Research and Selection Updates to WBS Updates to Knowledge Area Selection Project Management Plan Outline Forms and Checklists Selection

Current Status	[red] [yellow] [X green]	Forecast

Current Status	Forecast
Where am I now? Am I on track to meet next PPM deliverables? -In process of developing rigid WBS which will help deliver schedule. -In process of identifying business plan research areas and corresponding WBS work packages, activities and tasks -In process of identifying suitable requirements identification matrix -In process of developing scope statement -Developed scope management plan (Change plan) -In process of identifying structure for research methods Currently on track for meeting PPM Deliverables	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* Big picture: -Mind Mapping for Project WBS has been ongoing -Research into appropriate KPI's and Critical Success Factors is ongoing -Assessing the business opportunity and developing key milestones and gate reviews for project management plan -Will try to attain IRB approval -Creation of PM Plan Checklist will enable high level forecast and completion view Still in process of assessing how project will best contribute to PM Body of Knowledge

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. May see change in Metric/KPI selection. Risk Planning is still underway -Immediate risk: WBS structure does not meet PPM	*Wrap up with key items and where help needed from stakeholders.* Discussed issues with selecting KPI's and have received texts on how to address selection of appropriate KPI's. Defining and implementing Business Opportunity has

| deliverable resulting in schedule completion delay
    -Corrective action: Additional time spent on WBS development. Conceptual view of how scope will be identified is well into development. | been discussed. Stakeholder engagement has been highlighted as a critical performance area to address the business opportunity. May continue to need support as work unfolds. |

One Page PM 686A Project Status Report Dashboard
Name:_Kelvin Goode_____ Date:___02/27/2015_____
Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan. Selection of four knowledge areas to be used. Project Progress to be determined using knowledge areas A tool or template to help in contributing to the PM Body of Knowledge shall be developed. (Still in progress)	*Key tasks completed and key tasks started.* **Completed:** Updated Project Charter Updated Schedule Updated WBS Updated Stakeholder Analysis Updated Knowledge Area Selections Metrics Research and Selection Forms and Checklists Selection (Ongoing) Project Management Plan Outline Updated Scope Statement **Started:** Risk Identification (ongoing) Requirements Identification (ongoing) Scope Definition
Current Status 🟥 🟨 X🟩	**Forecast**
Where am I now? Am I on track to meet next PPM deliverables? -Resource loading WBS and schedule -Developing Lessons learned repository and integrating lessons learned into project communication structure. -Updated scope management plan (Change plan) -Structuring research methods and analysis Currently on track for meeting PPM Deliverables	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* Big picture: -Will try to attain IRB approval -Creation of PM Plan Checklist will enable high level forecast and completion view -Integration of selected progress metrics into project management plan and weekly activities -Schedule update -PMP Draft
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. Risk Planning is still underway -Immediate risk: none -Corrective action: WBS development will see change	*Wrap up with key items and where help needed from stakeholders.* Identifying how project will contribute back to the body of knowledge. May continue to need support as work unfolds.

One Page PM 686A Project Status Report Dashboard
Name:_Kelvin Goode_____ Date:___03/20/2015_____
Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver?	*Key tasks completed and key tasks started.*

Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan. Selection of four knowledge areas to be used. Project Progress to be determined using knowledge areas A tool or template to help in contributing to the PM Body of Knowledge shall be developed. (Still in progress)	**Completed:** All required PPM's submitted **Metrics:** **Lessons Learned: 5-risk, quality, time, communication** *Equipment deficiency*-no project on trip *Lacked consistency btwn documents*-Ensured Traceability btwn scope, charter, PMP with new saving method *Late in completing schedule*-created WPI *RFI's, lost a few responses*-Created RFI Log *No reporting of WPI*-Did not correlate actual work to schedule-created Labor analysis log. Controlled Changes vs. uncontrolled changes 0 uncontrolled since past PPM 1 controlled in progress since last PPM
Current Status 🟥 🟨 X 🟩	**Forecast**
Where am I now? Am I on track to meet next PPM deliverables? -Updating schedule for PM 686B -adding to lessons learned -Change request to transfer risk metrics to next semester -IRB NOT RESEARCH Letter Currently on track for meeting PPM Deliverables	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Schedule update -Finalize PMP -Drafting Presentation -Cleaning up loose ends -finalize change log and change plan
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. Risks -Immediate risk: work remotely in point hope -prioritized tasks that require internet -Moving Risk as knowledge area to PM686B, will issue change order -New Job-working around schedule.	*Wrap up with key items and where help needed from stakeholders.* -Identifying how project will contribute back to the body of knowledge. -Presentation, how to integrate overall understanding of PM knowledge into oral presentation -(for 686B) were metrics different for B vs. A & why? If you could have re-done it what metrics would u have used? -(for 686B) what top 2 or 3 parts of your PMP did you find required re-work in B? -(for 686B) what was your largest undocumented risk near the end of 686B & if you could do over how would you respond? -(for 686B) if you could have spent more time on something, which area/document would that be & why? -(for 686B) lessons learned on the presentation?

One Page PM 686A Project Status Report Dashboard
Name:_Kelvin Goode_____ Date:___03/20/2015_____
Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	**Progress Since Last Report**
What it's about and what it will deliver? Project regards defining a business opportunity and	*Key tasks completed and key tasks started.* **Completed:**

utilizing project management concepts define elements to deliver project management plan. Selection of four knowledge areas to be used. Project Progress to be determined using knowledge areas A tool or template to help in contributing to the PM Body of Knowledge shall be developed. (Still in progress)	All required PPM's submitted **Metrics:** **Lessons Learned: 5-risk, quality, time, communication** *Equipment deficiency*-no project on trip *Lacked consistency btwn documents*-Ensured Traceability btwn scope, charter, PMP with new saving method *Late in completing schedule*-created WPI *RFI's, lost a few responses*-Created RFI Log *No reporting of WPI*-Did not correlate actual work to schedule-created Labor analysis log. Controlled Changes vs. uncontrolled changes 0 uncontrolled since past PPM 1 controlled in progress since last PPM

Current Status 🟥 🟨 X 🟩	Forecast
Where am I now? Am I on track to meet next PPM deliverables? -Updating schedule for PM 686B -adding to lessons learned -Change request to transfer risk metrics to next semester -IRB NOT RESEARCH Letter Currently on track for meeting PPM Deliverables	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Schedule update -Finalize PMP -Drafting Presentation -Cleaning up loose ends -finalize change log and change plan

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. Risks -Immediate risk: work remotely in point hope -prioritized tasks that require internet -Moving Risk as knowledge area to PM686B, will issue change order -New Job-working around schedule.	*Wrap up with key items and where help needed from stakeholders.* -Identifying how project will contribute back to the body of knowledge. -Presentation, how to integrate overall understanding of PM knowledge into oral presentation -(for 686B) were metrics different for B vs. A & why? If you could have re-done it what metrics would u have used? -(for 686B) what top 2 or 3 parts of your PMP did you find required re-work in B? -(for 686B) what was your largest undocumented risk near the end of 686B & if you could do over how would you respond? -(for 686B) if you could have spent more time on something, which area/document would that be & why? -(for 686B) lessons learned on the presentation?

One Page PM 686A Project Status Report Dashboard

Name:_Kelvin Goode_____ Date:___03/20/2015_____

Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan. Selection of four knowledge areas to be used. Project Progress to be determined using knowledge areas A tool or template to help in contributing to the PM Body of Knowledge shall be developed. (Still in progress)	*Key tasks completed and key tasks started.* **Completed:** All required PPM's submitted **Metrics:** **Lessons Learned: 5-risk, quality, time, communication** *Equipment deficiency-*no project on trip *Lacked consistency btwn documents-*Ensured Traceability btwn scope, charter, PMP with new saving method *Late in completing schedule-*created WPI *RFI's, lost a few responses-*Created RFI Log *No reporting of WPI-*Did not correlate actual work to schedule-created Labor analysis log. Controlled Changes vs. uncontrolled changes 0 uncontrolled since past PPM 1 controlled in progress since last PPM

Current Status	█ █ X █	Forecast

Current Status	Forecast
Where am I now? Am I on track to meet next PPM deliverables? -Updating schedule for PM 686B -adding to lessons learned -Change request to transfer risk metrics to next semester -IRB NOT RESEARCH Letter Currently on track for meeting PPM Deliverables	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Schedule update -Finalize PMP -Drafting Presentation -Cleaning up loose ends -finalize change log and change plan

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. Risks -Immediate risk: work remotely in point hope -prioritized tasks that require internet -Moving Risk as knowledge area to PM686B, will issue change order -New Job-working around schedule.	*Wrap up with key items and where help needed from stakeholders.* -Identifying how project will contribute back to the body of knowledge. -Presentation, how to integrate overall understanding of PM knowledge into oral presentation -(for 686B) were metrics different for B vs. A & why? If you could have re-done it what metrics would u have used? -(for 686B) what top 2 or 3 parts of your PMP did you find required re-work in B? -(for 686B) what was your largest undocumented risk near the end of 686B & if you could do over how would you respond? -(for 686B) if you could have spent more time on something, which area/document would that be & why? -(for 686B) lessons learned on the presentation?

One Page PM 686B Project Status Report Dashboard

Name:_Kelvin Goode_____ Date:___09/04/2015_____

Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan and completed business plan following the steps outlined in the project management plan.	*Key tasks completed and key tasks started.* **Completed:** No Progress since last report. **-Future Progress will be cataloged via Lessons learned reporting and work performance index.**

Current Status	🟥 X 🟩	Forecast
Where am I now? Am I on track to meet next PPM deliverables? -in process of assessing project alignment to business strategy. Length of time away from project requires a fresh look from a high level view. -in process of finalizing questions for five remote off-grid lodges. -updates to project management plan and associated knowledge area plans.		*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Interview off grid lodges and analyze data. -review PMP and update where necessary -Review WBS/Schedule and update where necessary. -Submit approved Change Control Process -Final GSP approval -Advisor/Student agreement

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. -Risk that lodge interviews don't gather information/data required to impact cost and scope analysis.	*Wrap up with key items and where help needed from stakeholders.* -May require assistance with crafting the lodge questions so as to best fit IRB requirements.

One Page PM 686B Project Status Report Dashboard

Name:_Kelvin Goode_____ Date:___09/18/2015_____

Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan and completed business plan following the steps outlined in the project management plan.	*Key tasks completed and key tasks started.* **Completed:** No Progress since last report. **-Future Progress will be cataloged via Lessons learned reporting and work performance index.**

Current Status		X		Forecast
Where am I now? Am I on track to meet next PPM deliverables? -in process of assessing project alignment to business strategy. Length of time away from project requires a fresh look from a high level view. -in process of finalizing questions for five remote off-grid lodges. -updates to project management plan and associated knowledge area plans.				*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Interview off grid lodges and analyze data. -review PMP and update where necessary -Review WBS/Schedule and update where necessary. -Submit approved Change Control Process -Final GSP approval -Advisor/Student agreement

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. -Risk that lodge interviews don't gather information/data required to impact cost and scope analysis.	*Wrap up with key items and where help needed from stakeholders.* -May require assistance with crafting the lodge questions so as to best fit IRB requirements.

One Page PM 686B Project Status Report Dashboard
Name:_Kelvin Goode_____ Date:___09/25/2015_____
Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan and completed business plan following the steps outlined in the project management plan.	*Key tasks completed and key tasks started.* **Completed:** -Completed the list of questions and identified the top four similar businesses to interview. -Started draft outline for final report. -Started segregating research to match each section of the business plan. -Hosted lengthy discussions with sponsors and have assessed project is still green, contingent that I set more time aside for this project. -Updates to schedule/WBS (ongoing) **-Future Progress will be cataloged via Lessons learned reporting and work performance index.**

Current Status	Forecast

Current Status legend: Red | X | Yellow | Green

Where am I now? Am I on track to meet next PPM deliverables? Lesson Learned 11-Importance of being up to date with deliverables. Friend of family had medical emergency and 4 days were lost with several hours outside those days. Lesson Learned 13-Always have reliable equipment, computer was really slow and would shut down often, would lose at minimum two hours a day to computer ques. -WPI, in process of being calculated, requires complete schedule. Actual hours worked are being logged. -Started working on story boarding for business plan. -Working on updating schedule, WBS, PMP, other deliverables not 100% complete submitted with PPM1	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Interview off grid lodges and analyze data. (next 7 days) -PMP shall be updated -Schedule/WBS shall be updated and WPI shall be calculated. -Drafts for the report and business plan shall be created. -Risk realizations and lessons learned shall be added to the metrics dashboard.

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. -Documented Risk #5 that lodge interviews don't gather information/data required to impact cost and scope analysis. -Undocumented Risk #7 of not securing apartment was realized. Moved in 09/22/2015 and attained internet 09/24/2015. Was without home nearly three weeks. -Undocumented Risk #8 Close Family Friend has health emergency. Lost nearly 4 days and about 2 hours a day outside those days for nearly 1 week. -Undocumented Risk #9 Vehicle broke down. Lost nearly one week of transportation. -Undocumented Risk #10 Current laptop being used is slow and dies frequently. Time lost was enough to require a procurement of a new laptop.	*Wrap up with key items and where help needed from stakeholders.* -May require assistance with how to pursue the report. -Need to spend much more time on project so that a quality deliverable will be submitted. With apartment secured it is not anticipated to be a monumental task. -Will submit completed PPM 01 Deliverables prior to PPM 02.

One Page PM 686B Project Status Report Dashboard

Name:_Kelvin Goode_____ Date:___10/23/2015_____

Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan and completed business plan following the steps outlined in the project management plan.	*Key tasks completed and key tasks started.* **Completed:** -Completed the list of questions and identified the top four similar businesses to interview. -Complete draft final report within two weeks. -Business plan 82% complete -Updates to schedule/WBS (iterative)

Current Status 🟥 🟨 X 🟩	Forecast
Where am I now? Am I on track to meet next PPM deliverables? -WPI ~ 0.96 -business plan 82% complete, per schedule. -Continuous updating of schedule, WBS, PMP, other deliverables to be continued. -Lesson Learned 11-Interview Sample population for interviews was too close to home. No interaction or received vague guarded answers. Learned to spread basket wide in future.	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* -Interview on grid lodge, Saturday (10/24/2015) -PMP shall be updated -Schedule/WBS shall be updated and WPI shall be calculated. -business plan draft submission (Monday) -Risk realizations and lessons learned shall be added to the metrics dashboard.

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. -Undocumented Risk #12 Close Family (grama) has health emergency. Lost nearly 4 days and about 3 hours a day. Occurred 10/19/2015. -Documented Risk #08 Started new job 10/05/2015.	*Wrap up with key items and where help needed from stakeholders.* -will button up and distribute draft business plan Monday 10/26 no later than 3:30 PM. -request comments/recommendations with business plan draft.

One Page PM 686B Project Status Report Dashboard
Name:_Kelvin Goode_____ Date:___11/13/2015_____
Project Title:__Alaska Majestic Lodge Project_____

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? Project regards defining a business opportunity and utilizing project management concepts define elements to deliver project management plan and completed business plan following the steps outlined in the project management plan.	*Key tasks completed and key tasks started.* **Completed:** -Attempted to interview all 7 lodges -only one answered, did not sign consent form yet. -Report revised -Business plan 100% complete -Updates to schedule/WBS (iterative) -

Current Status	🟥 X 🟨 🟩	Forecast

Where am I now? Am I on track to meet next PPM deliverables? -WPI ~ 0.96 - Lessons learned, incorporate PERT analysis to maximize the value of risk as a knowledge area.	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* - Presentation brainstorming -Presentation drafting -Continued work on the project report -Updates to project management plan

Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
Imminent change, risks/responses, and corrective actions/timing required to keep project on track. -Undocumented Risk #12 Close Family (grama) has health emergency. Lost nearly 4 days and about 3 hours a day. Occurred 10/19/2015. - Risks realized, Friend in paris attack (she made it out at the end of the attack), Injured right hand 11/05, work package estimates not correct	*Wrap up with key items and where help needed from stakeholders.* -will button up and distribute draft report by Monday 11/16. -may need help with the project report…specifically how the flow of information carries through the document.

Appendix F

**Research &
Graduate Studies**
UNIVERSITY of ALASKA ANCHORAGE

DATE: November 19, 2014

TO: Kelvin Goode, MSPM
FROM: University of Alaska Anchorage IRB

PROJECT TITLE: [682066-2] PM 686A-B Capstone Project
SUBMISSION TYPE: New Project

ACTION: DETERMINATION OF NOT RESEARCH
DECISION DATE: November 19, 2014

Thank you for your submission of New Project materials for this research study. The University of Alaska Anchorage IRB has determined this project does not meet the definition of human subject research under the purview of the IRB according to federal regulations.

The IRB reviews research projects with human subjects that focus on the opinions, characteristics, or behavior of the individual subjects, but your questions focus on information about a product or business. Your questions are 'about what' the subjects can tell you about the products/businesses, they are not about the subjects themselves.

You have also indicated that there will be other questions. When submitting a project to the IRB, all questions should be stated in the proposal. If any of these other questions are about the subjects themselves, please provide a complete list of questions with a new project package.

Your new submission, if any, should focus on the human subjects research you plan to conduct, so all responses on your proposal refer to your planned interactions rather than to your external library, background, or business plan related efforts.

The number of participants should be the number of individuals you plan to interview or ask to attend a focus group, not the number of groups or categories of people you want to attract. This number was unclear in your project documents.

You should also be consistent and careful with your terminology when describing the time needed to complete the interview. In your proposal you state "less than one hour to two hours total" which refers to both a minimum and a maximum time in a confusing manner. In your Interview Introduction you state that the time commitment is "no less than 15 minutes" and your Consent Form has no time commitment. All documents must be identical.

At the end of the Consent Form, you state that Roger Hull is the research advisor. He should be correctly identified as the faculty advisor and the project should be identified as a student project.

We will retain a copy of this correspondence within our records.

If you have any questions, please contact Sharilyn Mumaw at (907) 786-1099 or simumaw@uaa.alaska.edu. Please include your project title and reference number in all correspondence with this office.

Sharilyn Mumaw, M.P.A.

Research Integrity & Compliance Officer
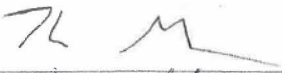
PROJECT CHARTER

Alaska Majestic Lodge

VERSION: 08   REVISION DATE: 12/05/2015

Approval of the Project Charter indicates an understanding of the purpose and content described in this document. By signing this document, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Kelvin Goode	51% Owners, President & Project Manager		12-5-15
Lucy Goode	49% Owner, Vice President		12-5-15
Brett Goode	Director of Facilities and Operations		12-5-15

Contents

Project Scope Statement

Opportunity Statement

An opportunity exists that allow for the business owners and project sponsors to deliver an Alaskan experience that prospective clientele will find memorable, exciting and unique. If the operation is conducted as planned, the owners may provide up to two hundred people unforgettable experiences that can be treasured and shared.

This lodge is located on Becharof Lake on the Alaskan Peninsula. The lodge establishment will be the only 100% Alaskan Native owned lodge in Southwest Alaska and the only establishment of its kind in the region. In the summer of 2011, over 48,000 people visited the southwest region. Not including travel, those tourists contributed nearly $84.8 million to the region's economy. AML's potential market share would amount to $1.8 million per year.

This project scope statement will define the boundaries of the AML Project. The project concerns the planning, development and delivery of the AML business plan. The project planning is expected to be completed by April 27, 2015. The business plan delivery date is expected to be November 20, 2015. It is estimated that no expenses shall be incurred during this project, however operational financial planning shall be incorporated into the project.

Product Description

AML will offer sport fishing, wildlife viewing, hiking, and educational teachings about the area, environment, and people. There will be six double occupancy rooms for visitors, two four-bed cabins for staff and a main lodge with the kitchen, lounge and office. The lodge manager will also act as winter man for the facility in the off-season. All labor will be seasonal.

Business Mission:

AML's mission is to promote goodwill, understanding and respect among the various cultural communities of the world.

Business Vision:

AML's vision is to preserve, protect and inspire humanities understanding of and respect for nature so as it remains intertwined in the fabric of modern society.

Business Goals include:

1. Provide product that promotes the Natural World and the betterment of human character.
2. Provide a product that exhibits first class resort sport fishing, wildlife viewing, and other recreational activities that utilize the regions resources and conform to Alaska Visitor Statistics Program most enjoyed activities experienced by tourists.
3. Provide product that educates clientele protecting and preserving of the natural environment.

Project Description

The AML Project is proposed to research sport fishing markets in Southwest Alaska. The output of the research will be a business plan with analysis which will deliver recommendations on how to approach establishing and operating a successful sport fishing lodge in Southwest Alaska. The business plan shall conform to the requirements and expectations set forth by project oversight approval authorities. Refer to the Project Charter for additional information regarding project oversight approval authorities.

Project Objective

The objective of the project is to deliver a final business plan of the proposed Alaska Majestic Lodge business. The business plan should provide the steps necessary to successfully saturate the market for sport fishing and tour

guiding in the Becharof National Wildlife Refuge. Through this endeavor, the Project Manager shall demonstrate his knowledge and mastery of project management principles via demonstration of understanding the project management knowledge areas of Scope Management, Time Management, Risk Management and Quality Management.

Project Justification

The Alaska Visitor Statistics program has shown that since 2012 a 7% increase in tourist volume has been realized in Southwest Alaska. The increase in added volume contributed an additional $4 million to total the visitor industry spending impact, which came to $120 million. Considering most villages in southwest Alaska do not possess the infrastructure to support tourism, the majority of the economic impact was seen in the lodging industry.

The area of interest for the proposed project is in the Becharof National Wildlife Refuge. There are no wilderness resorts in the refuge, ensuring a competitive edge in the market. The sponsors have conducted preliminary evaluation and found that lending institutions for a project of this stature are willing to provide funding after the property is procured. Comparing competition in the region, the benefits far outweigh the costs of operation.

Project Strategy

The project manager's strategy will include: researching other operations similar, researching economic viability, incorporating sponsor and personal experience, and iterative consultations with subject matter experts. This strategy shall enable the project manager to identify critical success factors, approval authority expectations and deliverable acceptance criteria.

Project Deliverables

The project scope shall deliver a 100% completed business plan no later than November 27, 2015. The AML project management plan shall consult of and incorporate Project Management Institute (PMI) methodologies throughout the project lifecycle. The AML project management plan shall address the following life cycle topic areas, management plans and documents:

Project Initiation

Project Charter
Stakeholder Assessment & Analysis
Project Success & Acceptance Criteria
Scope Statement & Initial Project Requirements

Project Planning

Project Document Integration
Scope Development & Change Management Planning
WBS Development
Schedule Planning
Quality Planning
Risk Identification, Analysis and Response Planning

Project Execution

Stakeholder Engagement
Metrics Utility and Accuracy Reporting

Business Plan must be ready to distribute. The information in the business plan shall address the following:
1. Executive Summary
2. Industry Analysis

        a.   Industry overview
        b.   Competitors
        c.   Current Target market

3. Company
    a. Concept
    b. Product/Service
    c. Our Target Market
    d. Why we are unique
    e. Company Structure
4. Market & Sales
    a. Target market
    b. How will we attract our customers
    c. Marketing Channels
    d. Website and social media
5. Operations
    a. Service
    b. Company Capabilities
    c. Competitive Advantage
6. Management & Ownership
    a. Management Team
    b. Gaps in team
    c. Board of Advisors
7. Critical Risks
    a. Potential risks and risk responses
8. Financials
    a. Capital
    b. Overview of Financials
    c. Strategic Plan
9. Appendix
    a. Marketing Channels
    b. Financials
    c. Milestones
    d. Loan Entities-Anchorage Area

Project Monitoring & Controlling

KPI and PMP validation
Status, Forecast and Progress reporting
Change Management Verification and Assessment

Project Closure

Transition to Operations Planning
Project Records, Documentation Control and Administrative Closeout Implementation
Project Narrative and Final Project Report
Project Management Maturity Assessment and Application
Organizational Process Assets and Enterprise Environmental Factors Analysis
Project Debriefing
Lessons Learned & Root Cause Analysis
Research Methods, Surveys and Data Analysis
100% Project Delivery and Sponsor Acceptance Document

Project Scope Includes
Initiating and Planning Deliverables -Development of Stakeholder Identification and Analysis -Development of Risk Identification and Analysis tool -Development of overall project schedule -Monitoring of Work Performance -Development of Project Management Plan -Development of Research Methods, Surveys and Research Data Analysis Executing, Monitoring and Controlling, and Closing Deliverables -100% Complete Business Plan -Development of list of Approved Vendors and Funding Agencies -100% Complete Project Management Plan

Project Limits & Exclusions

All else not mentioned in the scope statement is excluded from the project. The Project Manager is granted unilateral control over project activities and is approved to request, issue and approve project changes.

Critical Success Factors

- Meet the deliverables in the allotted time as shown in the schedule.
- Report progress at milestones using selected performance metrics.
- Pass PM 686A with marks no less than a "B" grade as indicated in the Syllabus.
- Lessons learned incorporated in plan development
- Project manager performs effective stakeholder management
- Institutional Review Board (IRB) Approves Project

1.6 Assumptions

- Proposed project is approved by Institutional Review Board (IRB).
- Business- future southwest state tourism revenues for sport fishing and tourism do not decline.
- Technology- Use of alternative technology will accommodate the mission of the lodge and contribute to long term cost savings.
- Resources- Project team working on the project are certified with credentials appropriate for planned work.
- Schedules- Time allotted for business plan development in PM 686B is enough time to deliver product.

1.7 Constraints

- Time-the business planning timeframe:
  - o Project Management Plan must be completed by April 10, 2015.
  - o Business Plan completion must be completed by November 27, 2015.
- Budget-No capital is currently allotted for planning and executing project.
- Location-the location is remote. The site is only accessible by float plan or small skiff in the summer season. This will add difficulty in designing the business plane as operation logistics are complex.
- Requirements in PM 686A and 686B Syllabus must be completed within the allotted time frame.
- Human Resources-Limited number of resources to accomplish planning of the business plan.

Acceptance Criteria

- Deliverables are posted on time.
- Deliverables posted are complete.
- Research package posted to IRB is complete.
- Deliverables posted meet quality requirements.
- Business Plan submissions are sponsor approved.

Major Project Milestones

PM 686A Milestone/Deliverable	Target Date
686A PPM #01 Required Deliverables Submitted	01/30/2015
686A PPM #02 Required Deliverables Submitted	02/20/2015
686A PPM #03 Required Deliverables Submitted	03/13/2015
686A PPM #04 Required Deliverables Submitted	04/10/2015
686A Research Proposal posted to IRB	04/10/2015
686A Oral Defense Presented	04/20/2015
686A Final Planning Required Deliverables & PMP Submitted	04/28/2015
PM 686B Milestone/Deliverable	**Target Date**
686B PPM #01 Required Deliverables Submitted	09/18/2015
686B PPM #02 Required Deliverables Submitted	10/10/2015
65% Business Plan Submitted	10/30/2015
686B PPM #03 Required Deliverables Submitted	11/07/2015
95% Business Plan Submitted	11/20/2015
686B PPM #04 Required Deliverables Submitted	11/27/2015
100% Business Plan Submitted	11/27/2015
686B Final Oral Defense Presented	12/02/2015
686B Project Final Required Deliverables Submitted	12/08/2015

Exhibit I: Project Milestones

1.8 Project Risks

Internal Risks

Positive

Opportunity: Sponsor Board members possess equally vested interests in the success of the business
Response: Quick to mobilize and act in sequence with each other

Opportunity: Business will be the only 100% native owned lodge in southwest Alaska

Response: Include in marketing plan and use to attain funding opportunities through minority owned business loans

Negative

Risk: Schedule compression
Response: Mitigate, identify all non-critical tasks and complete when able

Risk: Project design does not conform to product requirements
Response: Hold several stakeholder meetings for requirements gathering

External Risks

Positive

Opportunity: Business Plan completed earlier than deadline
Response: Re-assess work performance and hold stakeholder briefings to gather input regarding substandard work

Negative

Risk: Alaskan Southwest Tourism market trends decline
Response: Accept, market business at trade show conventions and gather clients directly

Funding Authority

No costs are anticipated in delivering the business plan.

Project Oversight Authority

Business Oversight Authorities:

Becharof National Wildlife Refuge (BNWR)
Alaska Department of Fish & Game (ADFG)
Alaska Department of Fish & Wildlife (ADFW)
Alaska Department of Environmental Conservation (DEC)
Department of Natural Resources (DNR)
Division of Environmental Health/Food Safety and Sanitation Program
Chapter 31 of the Alaska Administrative Code (AAC)
Alaska Department of Public Safety, Division of Fire and Life Safety (ADPS)
Lake and Peninsula Borough (LPB)
Internal Revenue Service (IRS)

Project Oversight Authorities:

Lucy Goode, Sponsor
Brett Goode, Sponsor
Kelvin Goode, Project Manager
LuAnn Piccard, PM Advisor
Roger Hull, PM Advisor
Jim Bates, PM Advisor
Sharilyn Mumaw, IRB Approval Authority

Relevant Policies:

The control of the project resides with the two sponsors. The project manager maintains unilateral authority to submit and approve changes that do not impose on the product requirements. The project manager is to provide progress report briefings and stakeholder meeting sessions to the sponsors to maintain project and product alignment.

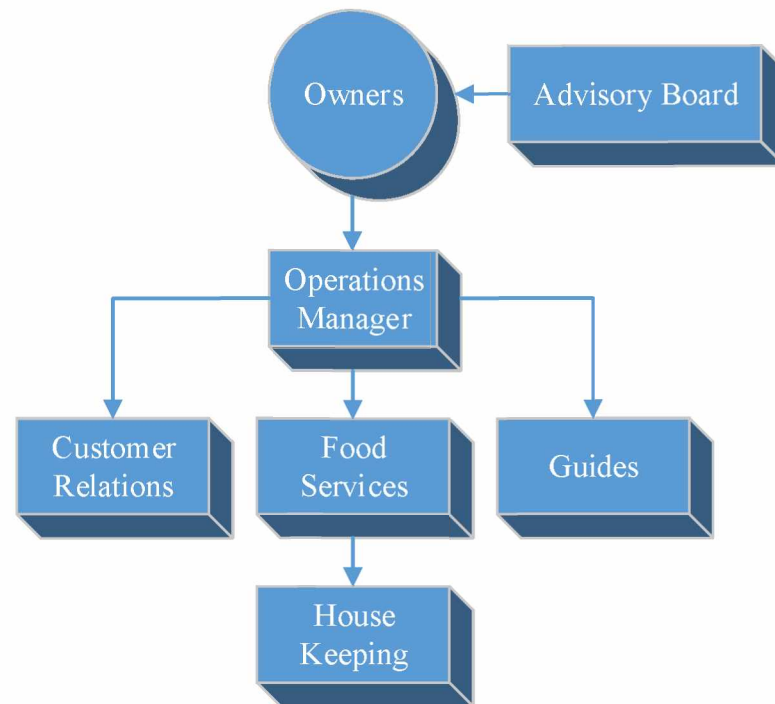**Business and Project Organization Charts**
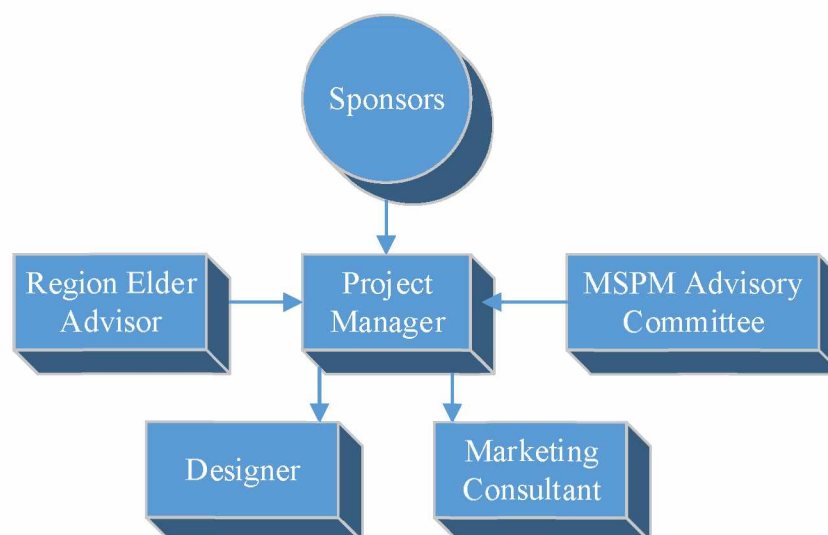

Exhibit II: Business Organizational Chart

Exhibit III: Project Organizational Chart

Roles and Responsibilities

Role	Responsibility
Kelvin Goode, Project Manager	Acts as liaison between the sponsors and project team, all project issues are reported to PM
Lucy Goode, Sponsor	Provides oversight and ensures alignment between project scope and business mission.
Brett Goode, Sponsor/Director of Operations	Provides support in oversight and planning. Will play crucial role in design of project
MSPM Advisors	Provide insights and advising to PM and act as final approval authorities for MSPM project related deliverables
Sharilyn Mumaw	Institutional Review Board (IRB) Approval Authority. Responsible for determining whether student research is acceptable according to IRB requirements

Exhibit IV: Project Roles Register

Responsibility Matrix

Alaska Majestic Lodge Resource Assignment Matrix (RAM)							
Major Milestone	Kelvin Goode	Lucy Goode (Sponsor)	Brett Goode (Sponsor)	Roger Hull (Primary Advisor)	LuAnn Piccard (Advisor)	Jim Bates (Advisor)	Sharilyn Mumaw (IRB)
PM 686A Milestone/Deliverable							
686A PPM # 01 Required Deliverables Submitted	E	A	A	A	A	I	
686A PPM # 02 Required Deliverables Submitted	E	I	I	A	A	I	
686A PPM # 03 Required Deliverables Submitted	E	I	I	A	A	I	C
686A PPM # 04 Required Deliverables Submitted	E	I	I	A	A	I	C
686A Research Proposal Submitted to IRB	E	I	I	A	A	I	A
686A Final Oral Defense Presented	E	I	I	A	A	I	
686A Final Required Project Deliverables Submitted	E	A	A	A	A	A	A
PM 686B Milestone/Deliverable							
686B PPM #01 Required Deliverables Submitted	E	I	I	A	A	C	
686B PPM #02 Required Deliverables Submitted	E	I	I	A	A	C	
65% Business Plan Submitted	E	C	C	C	C	C	
686B PPM #03 Required Deliverables Submitted	E	I	I	A	A	C	
95% Business Plan Submitted	E	C	C	C	C	C	
686B PPM #04 Required Deliverables Submitted	E	I	I	A	A	C	
100% Business Plan Submitted	E	A	A	C	C	C	
686B Final Oral Defense Presented	E	I	I	A	A	A	
686B Final Required Project Deliverables and Business Plan Submitted	E	A	A	A	A	A	

Legend

E = responsible for execution (may be shared)

A = final approval for authority

C = must be consulted

I = must be informed

Exhibit V: Resource Assignment Matrix for Summary Milestones

Points of Contact

Role	Name/Title/Organization	Phone	Email
Kelvin Goode	Project Manager	907-952-1805	kgchugiaker@hotmail.com
Lucy Goode	Project Sponsor	907-764-0063	lasg20@yahoo.com
Brett Goode	Project Sponsor	907-246-3778	lakebecharof@gmail.com

Exhibit VI: Contact List Table

Revision History

Version	Date	Name	Description
01	09/03/2014	Kelvin Goode	Document Created
02	10/10/2014	Kelvin Goode	Document Updated
03	10/29/2014	Kelvin Goode	Document Updated
04	01/25/2015	Kelvin Goode	Document Updated
05	02/20/2015	Kelvin Goode	Document Updated
06	03/15/2015	Kelvin Goode	Document Updated
08	04/07/2015	Kelvin Goode	Document Updated
09	12/05/2015	Kelvin Goode	Document Updated

Exhibit VII: Revision History Table

True Natives of Alaska Corporation
P.O. Box 296
King Salmon, AK 99613
Email Address: info@truenativesofalaska.com
1/28/15

Attn: Ms. LuAnn Piccard
Project Management Department (MSPM)
University of Alaska, Anchorage
University Center, Room 155
3901 Old Seward Highway
Anchorage, Ak 99503

Re: Letter of Support for Kelvin Goode's Majestic Lodge Project

Dear Madam,

It is with pleasure that I write this letter to express our support for our son Kelvin Goode's Majestic Lodge Project.

This project has been in the planning for many years in the family. We are very happy to have Kelvin take an important lead role in accomplishing that goal for the family business.

We are happy that his training and certification in project management at the University of Alaska has provided him the insight and knowledge to successfully manage a project of this caliber.

We have witnessed the education he has attained while attending the MSPM has provided him with the tools needed to accomplish this project.

He has a creative, intelligent mind with a positive attitude and a drive that are critical for success. We are confident the tools he has learned from the MSPM training will be used to successfully put this project together and run this business afterwards.

If you have any questions, please feel free to contact me at 907-764-0063 my cell or work number at Paug-Vik Inc. Ltd. 907-246-4278 ext. 4 General Manager, Lucy Goode.

Best Regards,

Lucy Goode
President of True Native of Alaska Corporation (TNAC)